



## 2022 NC CHARTER APPLICATION



NC Public Charters

### Organization Information

Organization Name \*

High Point Preparatory Academy

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Telephone

3364717236

Fax

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Address

3415 Langdale Drive

Unit/Suite

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Zip Code

27265

City

High point

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State

North Carolina

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**2022 NC CHARTER APPLICATION**  
NC Public Charters





2022 NC CHARTER APPLICATION  
NC Public Charters



Primary Contact Name \*

Kellie Jackson

Opening Year \*

2024

Is Management Organization Used

Yes  No

Management Organization Name

National Heritage Academies

Primary Contact Relation To Board \*

Chair

Primary Contact Email \*

kellie780@gmail.com

Management Organization Contact Name

Jeff Ichesco

Management Organization Phone

6162851588

Primary Contact Phone \*

3364717236

Management Organization Email

jichesco@nhaschools.com

Primary Contact Address \*

3415 Langdale Drive

Unit/Suite \*

Zip Code \*

27265

City \*

High point

State \*

North Carolina



## 1. Application Contact Information

### Q1. Name of Proposed Charter School

High Point Preparatory Academy (High Point Prep).



Constance Cuttino

Comments :

The applicant describes the school name as High Point Preparatory Academy.

### 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

616-285-1588.



Constance Cuttino

Comments :

The applicant has provided the alternate telephone number as 616 0285-1588.

### Q3. Geographic County in which charter school will reside

Guilford County.



Constance Cuttino

Comments :

The Geographic County is described as Guilford County.

### Q4. LEA/District Name

Guilford County Schools.



Constance Cuttino

Comments :

The LEA/District Name is Guilford County Schools.

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

TBD.



Constance Cuttino

Comments :

The applicant has not provided, it is listed as TBD.

**Q6.Was this application prepared with the assistance of a third party such as a consultant or Charter Support Organization (CSO) (<https://simbli.eboardsolutions.com/Policy/ViewPolicy.aspx?S=10399&revid=hejlsish9el7BC8rRkMVLthGg%3d%3d&ptid=amlgTZiB9plushNjl6WXhfiOQ%3d%3d&secid=lyc2NIZPsdzgEk6V6aj45g%3d%3d&PG=6&IRP=0>)?**

Yes

No



Constance Cuttino

Comments :

Yes.

**Q7.Give the name of the third-party consultant or CSO:**

National Heritage Academies (NHA).



Constance Cuttino

Comments :

The third party is identified as National Heritage Academies (NHA).

Q8. Describe any fees provided to the third-party person or CSO as reflected in the budget.

N/A.



Constance Cuttino

Comments :

N/A

Q9. Provide a full detailed response of the assistance provided by the third-party consultant or group while preparing this application and when the assistance will end:



Our founding Board is proposing High Point Preparatory Academy as a school that will serve all students, from all backgrounds, at all learning levels. The school will address multiple community needs, offering families a high-quality school choice beyond the traditional district, and a new school facility at no cost to the local taxpayers. Our founding group was formed in 2020 and intended to apply in the 2021 charter application cycle. Unfortunately, we did not have the necessary pieces in place to apply at that time. We sought a partnership with NHA to ensure we were prepared for the 2022 application cycle and our school will have the necessary supports to be successful.

NHA's work with nearly 100 partner schools across the country, including 15 in North Carolina, has resulted in a documented record of success. This success leads us to believe our community will benefit from a school like High Point Prep. We are confident in NHA's documented history of success in North Carolina.

Our school will utilize the innovative NHA model in place at 99 other schools who partner with the organization. NHA professionals have ensured that our application appropriately describes key facets of the model, including:

- The educational plan, including the curriculum and the tools and methods of instruction;
- Educational opportunities for at-risk students, English learners (EL), and exceptional children (EC);
- Discipline;
- Administration and staffing;
- Professional development for teachers and administrators; and,
- Marketing and enrollment.

Although we benefit from the support and collaboration provided by NHA, it is our Board submitting this proposal for High Point Preparatory Academy. Our mission and vision were developed by our Board, and we understand the need to increase learning opportunities for all students in High Point. The information contained in this submission makes clear our intentions for our proposed school. Our Board approached NHA to assist in developing our goals regarding academic success and points of operational importance. NHA's experience with setting and pursuing goals for our school, and for other North Carolina charter schools, has proven to be effective. As a result, the alignment of our shared priorities and the organization's track record lead us to believe a partnership is in the best interest of families.

We know that other nonprofit Boards have partnered with NHA in recent years to submit proposals for new charter schools in North Carolina. We understand that sections of our application may be similar to other boards partnering with NHA. Our Board makes clear that our application replicating the NHA model is ours. Our independent legal counsel is familiar with NHA and has reviewed portions of our application, including sections on governance and annual independent financial audits.



Constance Cuttino

**Comments :**

The applicant presents a reasonable description, of the charter school received from the third-party consultant, National Heritage Academies (NHA). . The services included creating a model that included the educational plan and the curriculum and the tools and methods of instruction; educational opportunities for at-risk students, English learners (EL), and exceptional children (EC); discipline, administration and staffing, professional development for teachers and administrators; and, marketing and enrollment. Weakness: The applicant does not describe when the assistance will end.

**Q10. Projected School Opening Month**

August.



Constance Cuttino

**Comments :**

The opening month is identified as August.

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

Yes (Year-Round)

No



Constance Cuttino

**Comments :**

The applicant does not propose to operate year-round.

**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



**Applicant Comments :**

Our projected student enrollment for Years 1-5 can be found in the attached table.

**Resources**

Enrollment Summary ...

**Applicant Evidence :**

High Point Preparator...

Uploaded on **4/27/2022**

by **Kellie Jackson**



Constance Cuttino

**Comments :**

As required, the applicant has presented information detailing the projected enrollment within the enrollment Summary Table. For example, Year 2's enrollment is projected at 604 K-6 students with a total enrollment of 772, K-8 students. In Year 1, the applicant proposes to enroll 520 K through 5 students and increase the number of students by 84 and the grade of students by Year 5.

**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

**Applicant Comments :**

High Point Preparatory Academy will not have a target population. Our plan is to serve a student population very similar to Guilford County Schools, specifically the schools in the High Point area. Our Enrollment Demographics table can be found in the attached table.



Resources



Enrollment Demograp...

Applicant Evidence :



High Point Preparator...

Uploaded on **4/27/2022**

by **Kellie Jackson**



Constance Cuttino

Comments :

The enrollment demographics are described and are as follows: White (68.2%), Hispanic (17.8%), Black (41.9%), Mixed (4.9%), American Indian (0.3%), Asian (6.8%), Islander Pacifier (0.2%) and two or more races (4.8%). Additionally, 47.9% are disadvantaged, 13.4% have disabilities, and ESL 10.0%.

**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.**

Our Board understands the need in the High Point area for additional high-quality educational choices. School choice offerings are limited within the county. There are currently 12 charter schools operating within Guilford County, five of which are NHA-partner schools (Gate City Charter Academy, Greensboro Academy, Summerfield Charter Academy, Summit Creek Academy, and a new partnership with Phoenix Academy). Combined, these schools serve nearly 4,000 students with over 4,500 students on the wait lists.

High Point Preparatory Academy will open serving 520 students in grades K-5. We will grow by one grade a year until we offer a full K-8 program serving 772 students.



Constance Cuttino

**Comments :**

The rationale is reasonable as the charter will help to alleviate the waiting list of 4,500 that may need to serve within the county.

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



Constance Cuttino

**Comments :**

The applicant certifies that this subsection has not been copied, pasted, or otherwise.

Q16. **Explanation (optional)**

Our Board has had the opportunity to review and consider this proposal. We also voted to submit the application as written. Our Board acknowledges many components could be similar to other NHA-partner schools with regard to operations. As such, significant portions of this proposal are similar to others submitted in previous years.



Constance Cuttino

**Comments :**

The applicant states that the Board is aware of their proposal being similar to other NHA-partner schools with regard to operations.

## Section



Constance Cuttino

Ratings

Meets the  
Standard

The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The applicant provides responses that are reasonable and answer the criteria overall except when the third-party assistance will end.



## 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



Constance Cuttino

Comments :

The applicant has selected a non-profit corporation.

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

- Yes
- No



Constance Cuttino

Comments :

The organization has not applied for 502(c)(3) non-profit status.

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

- 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

No



Constance Cuttino

Comments :

The organization does not have 501 (c)(3) status.

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

Kellie J. Jackson, 3415 Langdale Dr., High Point, NC 27265.



Constance Cuttino

Comments :

The applicant presents the Registered Agent as Kellie J. Jackson and the address as 3415 Langdale Dr., High Point, NC 27265.

**Q22. Federal Tax ID**

88-2006896.



Constance Cuttino

Comments :

The Federal ID number is listed as 88-2006896

## Section



Constance Cuttino

Ratings

Meets the  
Standard

The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The applicant has provided all information for this criteria as required.



### 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?

- Yes
- No



Constance Cuttino

Comments :

The applicant does not want to be considered for acceleration.



## Section



Constance Cuttino

### Ratings

**Meets the  
Standard**

The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

### Comments :

The applicant has provided the appropriate response as required.



## 4. Conversion

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

Yes

No



Constance Cuttino

Comments :

The application is not a Conversion from a traditional public or private school.

## Section



Constance Cuttino

Ratings

Meets the  
Standard

The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Comments :

The applicant has provided a response for the criteria as required.



## 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. **Is this application being submitted as a replication of a current charter school model?**

- Yes
- No



Constance Cuttino

**Comments :**

The applicant states that the application is being submitted as a replication of a current school model.

Q56. **Please provide the name of the charter school being replicated.**



We plan to replicate Greensboro Academy, another NHA-partner school in Guilford County that opened in 1999. The school currently serves over 760 students in grades K-8, with more than 2,100 additional students on its wait list. This school contracts with our proposed management partner, National Heritage Academies (NHA).

Greensboro Academy received an 'A' letter grade in each of the past two years with publicly available accountability data, and an 'A+NG' in the 2016-17 school year. Additionally, Greensboro Academy has exceeded growth in the five last school years with publicly available academic growth data.

In addition to academic success, Greensboro Academy has received clean independent financial audits, remains in operational compliance with all statutes and regulations, and regularly achieves parent survey results expressing more than 90 percent overall satisfaction.



**Constance Cuttino**

**Comments :**

The applicant states that they will replicate the Greensboro Academy which opened in 1999 in Guilford County.

**Q57. Please provide the state that the charter school being replicated has been authorized to operate in.**

North Carolina.



**Constance Cuttino**

**Comments :**

North Carolina is identified as the state where the school will be replicated.

**Q58. Are you a board of directors currently operating a charter school in NC and applying to replicate its currently existing model?**

Yes

No



Constance Cuttino

Comments :

The board of directors does not currently operate a charter school in North Carolina.

Q69.Are you a board of directors that does not currently operate a school but is partnering to replicate an existing model operated by an EMO/CMO?

Yes

No



Constance Cuttino

Comments :

The board of directors does not currently operate a school but is partnering with an existing model operated by EMO/CMO.

Q70.**Eligibility Criteria** Does the EMO/CMO partnering with the board meet the criteria listed below? A board of directors partnering to replicate an existing model operated by an EMO/CMO must demonstrate that each of the schools being managed by the EMO/CMO in North Carolina...

1. Has an academic proficiency comparable to the LEAs in which the current schools are located, or meets or exceeds growth for the three years immediately preceding the application at issue.
2. If the EMO/CMO does not manage any schools in NC or the schools it manages in NC do not yet have the data listed above, the board must demonstrate to the SBE that the schools operated in other states by the EMO/CMO meet similarly rigorous standards for academic performance. The EMO/CMO must continue to meet these standards throughout the application period.
3. The board must demonstrate that each of the schools in North Carolina managed by the EMO/CMO has unqualified audits without fiscal compliance issues for three years immediately preceding the application.
4. If the EMO/CMO does not currently manage any schools in NC or the schools in NC it manages do not yet have the data listed above, the board of directors must demonstrate to



the SBE that the schools operated in other states by the EMO/CMO meet similarly rigorous standards for financial performance. The board of directors must maintain this standard through the application period.

Yes

No



Constance Cuttino

**Comments :**

The applicant answers yes, however, no specific information is provided regarding the EMO/CMO and specifics for each of the 3 sub-criterion describes. For example, no information is provided indicating that each of the schools in North Carolina managed by the EMO/CMO has unqualified audits without fiscal compliance issues for three years immediately preceding the application.

**Q71. Attach as Appendix A3.1 Replication Educational Outcomes - for the replicated school for the last three academic years**

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 6

**Applicant Comments :**

Please see attached Appendix A3.1 Replication Educational Outcomes for Greensboro Academy, the school we intend to replicate.

**Applicant Evidence :**


Appendix A3.1 - Replic...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

**Q72. Describe which academic qualifications schools managed by the EMO/CMO have met that make them suitable for replication.**



Our founding Board intends to partner with NHA in part due to the comprehensive educational program it provides. While we understand many organizations have the capability to assist us in opening a new school, NHA's successful track record of doing so (including in Guilford County) was attractive to our Board. High Point Prep will benefit from NHA's personalized curriculum, professional development, and competitive staffing – plus a new school facility. NHA has a documented record of success in serving students from all backgrounds and needs. Additionally, its program and approach to education – including the four pillars High Point Prep will embody (academic excellence, student responsibility, parental partnerships, and moral focus) – will serve our mission well.

Since 2013, NHA has partnered to open, on average, one school annually in North Carolina. NHA takes a careful and measured approach to growth. All schools up for renewal have been renewed, and all charter contracts remain in place. This trend is expected to continue. NHA's growth has also been primarily in states in which the organization currently serves other schools. The resources needed to develop systems to support new schools have been more modest than they would be in a new state, allowing NHA to maintain its focus on improving instruction.

NHA has successfully partnered in the development of 14 North Carolina charter schools since 1999. For more details on these schools, please see Appendix A3.1. Additionally, in March 2022 NHA was hired to assume the management of an existing school in Guilford County, Phoenix Academy. These NHA-partner schools consistently deliver better results than neighboring district schools.

In 2018-19, 11 of NHA's 13 operating partner schools met or exceeded growth and earned a 'C' or above on the state's accountability system (one new school opened in 2021-22). Consider the following outcomes achieved by NHA-partner schools in 2018-19:

- Seven of 13 NHA-partner schools outperformed their local districts in both reading and math.
- Ten NHA-partner schools outperformed their local districts in reading.
- Nine schools outperformed the state average in reading, while eight did so in math.
- All but three NHA-partner schools in North Carolina achieved math and reading proficiencies compared to local districts that were within five percentage points or better.
  - Forsyth Academy serves an at-risk student population much greater than its local district. It outperformed the five nearest schools in both math and reading, and met growth twice between 2016-17 and 2018-19.
  - Gate City Charter Academy's serves an at-risk student population much greater than its local district. The school outperformed the five nearest schools in both math and reading, and met or exceeded growth twice between 2016-17 and 2018-19.
  - PreEminent Charter School serves an at-risk student population significantly greater than its local district. The school outperformed the five nearest schools in both math and reading, increased its overall accountability score each in each of the past three years with publicly available data (also letter grades in two of three years: 'D', 'C', 'C'), and met or exceeded expected growth annually during the same timeframe.

Additionally, schools partnering with NHA maintain high levels of success with regard to fiscal and legal



compliance. All schools have a longstanding record of clean independent audits of finances and remain compliant with all charter, state, and federal requirements.

We plan to replicate Greensboro Academy, another NHA-partner school in Guilford County that opened in 1999. The school currently serves over 760 students in grades K-8, with more than 2,100 additional students on its wait list.

As noted, in 2018-19 Greensboro Academy outperformed its closest schools, Guilford County Schools, and state averages in both math and reading. It exceeded growth and has consistently received audits without significant findings. Please see Appendix A3.1 for further evidence of Greensboro Academy's strong academic, organizational, and financial performance.

**Q73. Financial History** In the following questions, outline the 3-year financial history of the proposed replicated charter school as evidenced in either financial statements or the IRS Form 990. (You will attach the related documents after answering these questions.) **1) Financial History 1 Year Prior**

Please see included as Appendix A3.2 Replication Financial Evidences the IRS Form 990s for Greensboro Academy. This school remains in a strong fiscal position, has received an annual unqualified audit without significant findings, and approves a budget at multiple points of the year during public board meetings.

**Q74.2) Financial History 2 Years Prior**

Please see included as Appendix A3.2 Replication Financial Evidences the IRS Form 990s for Greensboro Academy. This school remains in a strong fiscal position, has received an annual unqualified audit without significant findings, and approves a budget at multiple points of the year during public board meetings.

**Q75.3) Financial History 3 Years Prior**

Please see included as Appendix A3.2 Replication Financial Evidences the IRS Form 990s for Greensboro Academy. This school remains in a strong fiscal position, has received an annual unqualified audit without significant findings, and approves a budget at multiple points of the year during public board meetings.

**Q76. Attach the Financial History supporting documents as "Appendix A3.2 Replication Financial Evidences."**

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 10



Applicant Evidence :



Appendix A3.2 - Replic...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

Q77. Do you want your application to be considered for Fast-Track Replication?

- Yes
- No



## 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



## 7. EMO/CMO

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

- Yes  
 No

Q87. EMO/CMO Mailing Address City, State, Zip

National Heritage Academies.

3850 Broadmoor Ave. SE, Grand Rapids, MI 49512.

Q88. EMO/CMO Website

<http://www.nhaschools.com> (<http://www.nhaschools.com>).

Q89. Explain how the contract with the specified EMO or CMO will be in the best educational and financial interest of the charter school.



NHA's work with nearly 100 partner schools across the country, including 15 in North Carolina, has resulted in a documented record of success with students from all backgrounds. The organization has extensive experience in the charter school sector, serving nearly 66,000 students, with nearly 14,000 students on the waiting lists. Specific to North Carolina, NHA-partner schools enroll over 11,000 students in 15 schools (over 11,000 students are on waiting lists). North Carolina charter schools partnering with NHA have replicated the success of partnerships nationwide, achieving academic results that lead to substantial outcomes for students. This success has been recognized by other charter schools operating in the state. For the first time in the organization's history, NHA partnered with an existing school, Phoenix Academy, in Guilford County. High Point Prep will benefit from the proximity of Phoenix Academy to our intended search area. This partnership provides our staff the opportunity to gain and share best practices. Our staff will also participate in regional professional development that will reinforce material from earlier development sessions, while adding emphasis on new aspects of the model offered by NHA, such as interim assessments. High Point Prep's relationship with NHA will offer our school a comprehensive educational program. This includes, but is not limited to, curriculum and instruction, ongoing professional development, and staffing.

Our driving motivation for High Point Prep is to provide high-quality school choice beyond the traditional district, and a new school facility at no cost to local taxpayers. Partnering with NHA for a new K-8 school choice will provide families in our community the educational model they desire as demonstrated through the wait lists at current NHA-partner schools in Guilford County.

### **Best educational interest**

Partner schools working with NHA have yielded strong academic records and successful partnerships. Consider the following:

- No partner board has ever terminated its services agreement with NHA.
- Six NHA-partner schools in North Carolina going through renewal in recent years received 10-year renewals, evidencing the strong success of the NHA model.
- Since 1995, all NHA-partner schools up for renewal were successfully renewed by their authorizer, with the exception of one instance. Rochester Leadership Academy Charter School (Rochester, NY) was not renewed in 2005 for not meeting the goals outlined in its charter contract.
- Research by Stanford University's Center for Research on Education Outcomes shows NHA students receive the equivalent of an extra 80 days in math each year and receive an extra 63 days in reading over the same timeframe (CREDO, 2017).

### **Best financial interest**

NHA has committed to make considerable investments to High Point Prep, and we are excited about what that means for families in our area.

- As part of our delegation of daily operations to NHA, NHA is obligated to provide start-up funds for the



development of curriculum and a technology system, selecting, hiring, and training staff, and for ensuring that our facility is clean and appropriately equipped. These are start-up investments by NHA and deemed to be contributions to our Board, with no expectations of repayment.

- Once a charter is awarded, NHA commits to purchase real estate and build or renovate a building at no cost to the partner school board. NHA provides private capital to finance the facilities and provides these funds as a contribution, not a loan. This is typically a multi-million-dollar up-front investment to cover site plan reviews, permits, construction, and construction related costs.

As outlined throughout this application, our Board has come together to establish a new public school choice beyond the traditional school district and a new school facility at no cost to local taxpayers. In the High Point area, there is only one district school utilizing the K-8 structure. Additionally, an independent study funded jointly by the Guilford County Commission and Guilford County Schools found that more than 50 percent of district schools were rated as being in poor or unsatisfactory condition. Of the 21 schools within a 5-mile radius of High Point, the study recommended that nine of these schools should be replaced or renovated.

While Guilford County Schools has attempted to secure the necessary funds for facility updates, they have not been successful. In 2020, the district asked voters to approve a \$300 million school bond and a quarter cent sales and use tax (expected to produce \$19 million in revenue). While voters approved the \$300 million school bond referendum, they did not approve the quarter cent sales and use tax. Our community is struggling to keep up.

On the May 17, 2022 ballot, voters will consider a \$1.7 billion school bond as well as a fraction of a penny (0.25 percent) sales and use tax. This bond would help fund over \$363 million in critical safety and technology upgrades at all district schools; fund construction of three new schools on their current sites; fund the rebuilding of 18 existing schools on their current sites; fund full renovations of 13 schools that require top-to-bottom improvements; and fund major repairs to additional schools with failing roofs, heat, air conditioning, and plumbing. Four schools in our intended search area are included in Phase 1 of the district's facilities master plan, which would be funded by the proposed bond. Two are planned to be rebuilt on their current sites and two schools are included to be renovated. Our community will benefit from a faster response to the need of a new school facility at no cost to local taxpayers.

#### Q90. [Attach Appendix A4.1: Executed Management Contract](#)

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

#### Applicant Comments :

Please see attached Appendix A4.1 for our executed management contract with National Heritage Academies.



Applicant Evidence :



Appendix A4.1 - Execut...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

Q91. What other EMO/CMOs were pursued and why did the applicant select this one? Please include information regarding other management organizations' fees and financial/academic records that led to the selection of the proposed EMO/CMO as the best fit for this proposed school.



Our founding Board intends to partner with National Heritage Academies (NHA) in part due to the comprehensive educational program it provides. This includes a personalized curriculum, professional development, staffing, and more, plus a school facility. Additionally, its program and approach to education – including the four pillars – will benefit High Point Prep. We believe this partnership is in the best interest of families who will choose to enroll their students with our school.

NHA has extensive experience in the charter school sector, serving nearly 66,000 students in nearly 100 partner schools, with nearly 14,000 students on waiting lists in the 2021-22 school year. This includes 15 partner schools in North Carolina governed by local Boards serving over 11,000 students with over 11,000 students on waiting lists. In Guilford County, NHA partners with 5 schools (Gate City Charter Academy, Greensboro Academy, Summerfield Charter Academy, Summit Creek Academy, and Phoenix Academy) to serve nearly 4,000 students with over 4,500 students on waiting lists.

High Point Preparatory Academy will meet the needs of our community. In the 2018-19 school year, Guilford County Schools had 124 school that served 70,900 students. Thirty-five of the 124 schools were low performing. Eight of the 35 low-performing schools are in High Point. By offering a new K-8 school overseen by our local Board, High Point Prep will increase learning opportunities for all students in our area. This is demonstrated through our mission and vision statements. Our community-based Board understands the benefits of partnering with NHA for comprehensive support. NHA is an experienced charter school operator with a documented record of success that dates back to 1995. Our Board will oversee academics, operations, and finances, holding NHA accountable to successfully deliver its model to High Point Prep. NHA offers High Point Prep – and Guilford County – a 21st Century-ready facility, coupled with long-term academic success for students from all backgrounds. Across their nationwide network, 66.5 percent of students qualify for free or reduced-price lunch, 77.3 percent are demographically minority, 8.4 percent are English learners, and approximately 10 percent are Exceptional Children.

Our Board attempted to submit a proposal for a new charter school in 2021. To ensure we have the tools to be successful this year, we sought a partnership with an EMO and reached out to NHA. Our members researched the benefits of a partnership with NHA, and noted the studies highlighting outcomes achieved by NHA-partner schools. Stanford University's Center for Research on Education Outcomes (CREDO) has found that students at NHA-partner schools are learning at high levels. Specifically, students enrolled at an NHA-partner school receive the equivalent of 80 extra days of learning each year in math and an extra 63 in reading (CREDO, 2017).

NHA covers all start-up costs associated with designing, building, and/or renovating a school tailored for NHA's academic model. It also covers costs of launching the academic program, and it often contributes its own funds for supplemental instruction. Under this model, which relieves boards of a burden that crushes many charter school projects, NHA leases the building to partner boards in predictable leases. The leases, which are negotiated with boards, impose no automatic rent increases and reflect appropriate value of



these single-purpose buildings.

Q92. Provide and discuss student performance, governance performance, and financial data from other schools managed by the management company to demonstrate how this organization is a good fit for the targeted student population. Nationally, what are the highest and lowest-performing schools of the EMO/CMO? Why are these two schools so different in overall achievement?



NHA-partner schools yield admirable student outcomes and success. The most recently available public data in each of the states in which it operates (2018-19) shows that 76 percent of partner schools perform at a higher level than the local district. Furthermore, NHA and NHA-partner Boards implement strong governance practices, consistently receive clean audits, and maintain outstanding rates with regard to compliance.

NHA partners with 15 schools in North Carolina (13 operating with NHA management in 2018-19 – the most recent year with publicly available accountability data). During the 2018-19 school year, eight schools exceeded growth and three met growth. Two schools did not meet their expected growth. Overall, NHA-partner schools gained ground in every subject against their local district, comparison schools, and the state. Additional highlights are below.

- Greensboro Academy, the school we intend to replicate, has regularly achieved high levels of academic success. For the fifth year in a row, Greensboro had a letter grade of “A” or “A+NG.”
- Peak Charter Academy and Summerfield Charter Academy received letter grades of “A” and exceeded growth.
- Queen’s Grant Community School and Wake Forest Charter Academy received “B” letter grades and exceeded growth.
- Johnston Charter Academy, Matthews Charter Academy, PreEminent Charter School, Research Triangle Charter Academy, and Winterville Charter Academy all earned letter grades of “C” and exceeded or met growth.
- Rolesville Charter Academy earned a “C” letter grade in its first school year, but did not meet expected growth.
- Forsyth Academy and Gate City Charter Academy earned “D” letter grades. Gate City met growth, while Forsyth did not.

### **Highest and lowest NHA-partner schools**

On the fall 2018 NWEA math and reading assessment (2018-19 is the latest year with reliable data due to the educational disruption of the COVID-19 pandemic), 88 percent of students were at or above grade level at Greensboro Academy (NC). At Orion Academy (OH), 13 percent of students were at or above grade level. The difference can be attributed to student demographics (7 percent vs. 97 percent free or reduced-price lunch, respectively) and the proficiency rate of incoming students (78 percent vs. 8 percent, respectively). In both cases, however, NHA has ensured and accelerated academic growth for students.

Stanford University’s Center for Research on Education Outcomes (CREDO) has found NHA’s success to be significant. Research from a recent study found that on average students grow their academic performance each year they are enrolled in an NHA-partner school. This results in the equivalent of 80 additional days of learning each year in math and an additional 63 days in reading. CREDO has long researched academic outcomes, and in this study examined nearly 3.7 million individual student records. These records span 63,616 traditional public schools and 5,715 charter schools across 24 states (as well as New York City and



Washington, D.C.). This study also includes 286 charter school networks (such as NHA). NHA was found to be within the top 20 percent of all schools surveyed, landing in the 84th percentile. CREDO's research shows that NHA outperforms over four-fifths of the other charter school networks studied. Overall, CREDO's work showed students enrolled in NHA-partner schools gain a composite 71 additional days of learning over the course of a school year.

Although the COVID-19 pandemic has impacted the ability to collect comprehensive student achievement data, CREDO released a survey-based analysis of select charter schools' responses to pandemic-driven disruptions in February 2022. The study analyzed charter schools in three states, California, New York, and Washington. Findings suggest that a majority of charter schools in the survey demonstrated "resilience and creativity" in responding to the needs of students.

NHA-partner schools implemented a wide range of innovations and supports in teacher turnover and learning in response to new challenges posed by the pandemic. Typically, these steps included:

- The distribution of Chromebooks to all students at no charge and the provision of Internet "hotspots" to families that would not otherwise have Internet access.
- A commitment to digital virtual learning that emphasized robust, rigorous, and standards-based content in a format that is simple and easy to implement remotely.
- The addition of new professional development (PD) programs, including both in-person sessions and virtual training models, on a wide range of topics, including: techniques of virtual instruction; instructional strategies for virtual learning; student engagement strategies; enhanced parent engagement; and use of new tools conducive to virtual learning, such as Google Classroom.
- New parental outreach initiatives to both explain new learning plans and strategies, offer broad technical support, and check on the well-being of students and families.
- Standards-based virtual lessons that focused on state standards in math, ELA, science and social studies as well as rigorous lessons in NHA's Moral Focus curriculum.

**Q93. Describe how the governance structure will be affected, if at all, by the EMO/CMO, and particularly discuss how the board of directors of the charter school will govern the school independently of the EMO/CMO.**



If our Board is awarded the charter for High Point Prep, we will be responsible to achieve the goals of the school. Our board will oversee the academics, operations, and finances of High Point Preparatory Academy. NHA will manage daily operations of the school, and our Board will hold them accountable for a high level of success.

Our Board is independent of NHA, and we have contracted with independent legal counsel to advise us in our duties. This is defined within our executed services agreement and draft lease agreement between our Board and NHA. We have also engaged an independent auditor to review High Point Prep's finances. We may also prioritize an independent review of our management partner.

Our Board will have a lease agreement with NHA, which is separate from our services agreement, that guarantees that High Point Prep can occupy the school facility for at least one additional full school year if we terminate our management relationship with NHA. Please see a draft of our lease agreement included as Appendix A4.1.

Each year High Point Preparatory Academy will develop a School Improvement Plan (SIP), a comprehensive needs assessment of the school educational practices and the identification of strategies to meet those needs in the upcoming school year. The SIP will provide a comprehensive analysis of student achievement, school environment, teacher community, parent community, and administrative data. The school will focus on and prioritize building-wide professional development efforts on the areas identified in the SIP. Beyond serving as a call to action for our school's needs, the SIP is an additional accountability measure for our Board of NHA's performance.

Our Board will hold NHA accountable, and together in partnership, will oversee our principal. Our school leaders will oversee our grade-level deans and administrative staff. Our Board will be responsible for the hiring and termination of teaching staff.

**Q94. Provide a description of the relationship that will exist between the charter school employees and the Management Organization.**



High Point Prep's teaching staff will be jointly employed by both our Board and NHA. School leadership (principal and deans) and additional school staff will be employed solely by our partner, NHA. The entire employment relationship is outlined within our executed services agreement with NHA. We will require NHA to seek candidates for teaching roles who meet requirements for state credentialing and potential employment. Our principal and NHA will be held accountable for student success, and we maintain the authority to express dissatisfaction with our school leader. Our Board will allow sufficient time to resolve any deficiencies, but we maintain the right to direct NHA to terminate the principal if improvements do not become evident.

We will leverage NHA's comprehensive and proven systems to offer employee benefits, payroll, employment compliance documentation, retirement programs, and additional human resources functions. This is utilized at other NHA-partner schools in North Carolina.

**Q95. Explain how the contract includes measurable objectives whereby the charter school board can evaluate annually the performance of the EMO/CMO, and if necessary, terminate the contract without significant obstacles.**

NHA is contractually required to ensure High Point Prep remains in good standing with regards to the compliance of our charter. The organization is obligated to help us achieve our mission, vision, and goals.

Each year, we will hold NHA accountable for the academic, operational, and financial outcomes of High Point Prep. This will include:

- Academic growth, proficiency, and achievement goals (outlined in the "Goals" portion of this application).
- Operational target goals, including on student attendance (at least 93 percent), parent satisfaction (80 percent or higher with at least 50 percent of parents responding to the satisfaction survey), and fiscal soundness (an unqualified audit annually).
- NHA will be required to work with school leaders to perform a comprehensive annual review of the school's education program, developing a formal, action-specific School Improvement Plan provided to our Board for review, input, and approval.
- The Board will regularly conduct a formal performance review of NHA.

Our Board is independent from NHA, if we chose to separate from NHA and terminate our agreement, we can do so with 90 days' written notice. We also may terminate the agreement if NHA fails to remedy a material breach within 30 days. If we terminate, our lease agreement allows us to remain in the school facility for the rest of the school year and an additional year if needed. In the event of termination, per-pupil funding will continue to flow to our school and the Board can finance operations.

**Q96. Is the facility provided by the EMO/CMO?**

- Yes



No

**Q97. Attach Appendix A4.2 Facility Buyout Agreement, if applicable**

Please see attached, Appendix A4.2 Facility Buyout Agreement. This appendix explains High Point Preparatory Academy's relationship with National Heritage Academies regarding the use of a school facility as specified within our lease agreement.

**Applicant Evidence :**


Appendix A4.2 - EMO-C...

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**Q98. List the fund balance and surpluses for each school managed by the EMO/CMO over the last three years in North Carolina.**



In 2021-22, 15 charter schools in North Carolina partnered with NHA through agreements similar to the one we propose. They maintained positive fund balances throughout the past three fiscal years (2020-21, 2019-20, 2018-19):

- Forsyth Academy (\$70,783, \$49,697, and \$27,045)
- Gate City Charter Academy (\$28,922, \$33,890, and \$19,337)
- Greensboro Academy (\$45,281, \$50,507, and \$36,013)
- Johnston Charter Academy (\$40,119, \$17,482, and \$10,240)
- Matthews Charter Academy (\$62,232, \$48,892, and \$32,943)
- Peak Charter Academy (\$46,752, \$21,725, and \$14,978)
- *Phoenix Academy (Partnership with NHA was approved in March 2022) (\$2,407,635, \$1,598,674, and \$508,154)*
- PreEminent Charter School (\$47,582, \$27,449, and \$14,039)
- Queen's Grant Community School (\$2,584,304, \$1,655,678, and \$1,354,062)
- Research Triangle Charter Academy (\$70,692, \$36,863, and \$22,299)
- Rolesville Charter Academy (\$27,503, \$13,057, and \$13,872)
- Summerfield Charter Academy (\$81,641, \$47,102, and \$42,524)
- *Summit Creek Academy (This school opened in the 2021-22 school year)*
- Wake Forest Charter Academy (\$34,110, \$33,351, and \$26,401)
- Winterville Charter Academy (\$60,410, \$43,386, and \$38,147)

Partner school audits for the 2021-22 school year are not yet final, and the figures provided have not yet been audited. Each partner school's Board of Directors directs the use of up to \$35,000 annually included within its budget. Boards direct the expenditure of discretionary funds for both educational and/or extracurricular expenses beyond the model educational and operational programming. Boards also have the ability to reserve these funds for future consideration and determination. One of the advantages of our partnership with NHA is its commitment to providing initial and ongoing investment to ensure schools open successfully. This includes certain contributions to make certain the educational program is implemented from day one. NHA assumes obligation for a school's expenses, meaning it assumes certain financial risk.

**Q99. Attach Appendix A4.3: EMO/CMO Financial History Provide as Appendix A4.3 the financial history and statements of the EMO/CMO over the last three years. Specifically, if contracting with an EMO, provide confirmation that the EMO is in good standing by providing bank statements from the prior three years.**

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Applicant Evidence :



Appendix A4.3 - EMO-C...

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by **Kellie Jackson**

**Q100. Attach Appendix A4.4: IRS Form 990** Provide as Appendix A4.4 the IRS Form 990 (or equivalent documents if the organization does not file a 990) for the prior three years

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Applicant Evidence :



Appendix A4.4 - IRS Fo...

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by **Kellie Jackson**



## 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.

High Point Preparatory Academy strives to empower all scholars to become collaborative, successful, and responsible citizens by fostering strong literacy skills and implementing a rigorous academic program and moral focused curriculum within a supportive environment.

**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.

High Point Preparatory Academy will be known as a school where we believe that strong literacy skills are essential in developing responsible, self-motivated learners. We nurture creativity, compassion, and empathy through thoughtful collaborative learning and a challenging curriculum.

**Q103. Educational Need and Targeted Student Population of the Proposed Charter 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-](https://www.ncleg.net/EnactedLegislation/Statutes/PDF/BySection/Chapter_115C/GS_115C-)



218.45.pdf).

High Point Preparatory Academy proposes to open in 2024 with grades K-5, offering 100 seats in kindergarten, and 84 seats each in grades 1-5. We will eventually grow to a full K-8 configuration by adding one grade a year. By our fourth year, our school will offer a high-quality K-8 school choice.

High Point Prep will not target a specific student population. Instead, we will aim to serve students from all backgrounds and with varying needs. Nearly 68 percent of 150 families contacted in an anonymous survey expressed their interest in a new school choice. Additionally, over 55 percent of those responding said the quality of education for their child to be average, at best. This leads us to believe we will receive interest from families across Guilford County. Our partnership with NHA will allow us to direct our marketing and outreach efforts to families in High Point and broadly throughout the county.

It is likely that our enrollment will be similar to the student populations of Guilford County Schools, and specifically the schools in the High Point area. Student demographics include:

**Guilford County Schools**

- White: 2 percent
- Hispanic: 17.8 percent
- African American: 9 percent
- Multiracial: 4.8 percent
- Asian: 8 percent
- American Indian: 0.3 percent
- Pacific Islander: 0.2 percent

Approximately 48 percent of the student population at GCS qualifies for free and reduced-price lunch (FRL). Nearly 10 percent of GCS students are English learners (EL), while 13.4 percent are Exceptional Children (EC).

**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?**



As noted earlier in our proposal, school choice offerings are limited in the county. There are currently nine charter schools operating within Guilford County, only one of which is in High Point. A lack of school choice in the area increases the demand for a charter school such as High Point Prep.

Twenty-two percent of those living in our area are under the age of 18, and Guilford County Schools (GCS) enrolls approximately 68,200 students. High Point Prep will create a high-quality K-8 facility, assisting the community in increasing school choice options in our area. Over 38 percent of the schools within a 5-mile radius of the High Point, our proposed location, received a letter grade below a "C" in 2018-19 (the most recent year with publicly available accountability data).

As indicated, GCS serves approximately 68,200 students. Over 41 percent of students are African American, 28.2 percent are White, 17.8 percent are Hispanic, 6.8 percent are Asian, 4.8 percent are Multiracial, 0.3 percent are American Indian, and 0.2 percent are Pacific Islander. Nearly 48 percent of students are eligible for free or reduced-price lunch.

High Point Prep's educational programming will utilize the NHA model, as we partner with the organization for the daily operations of our school. It is our belief that NHA's commitment to ensuring student success through personalized instruction and systematic intervention will be attractive to area families. This model is currently in place at five other NHA-partner schools in Guilford County, where nearly 4,000 are currently enrolled and over 4,500 students are on the wait lists.

**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).**

High Point Preparatory Academy will initially open in 2024-25 with grades K-5 (520 students). We will add one grade each year until we offer a full K-8 configuration in 2027-28 (772 students).

Our management partner, NHA, will ensure we have necessary resources for our entire academic program, despite not opening with all K-8 grades. This includes having the full High Point Prep leadership team onboarded when we open. Our facility will be ready to serve students through eighth grade on our first day (despite opening with grades K-5). This will position us well, as we focus on quickly and efficiently putting into place programs, procedures, and practices without any future construction disruptions.

As noted throughout our proposal, our area will benefit from additional educational choice.

**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**



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the currently available public-school options?



High Point Prep is proposing to replicate the model in place at Greensboro Academy and all other schools partnering with NHA. This will include implementing NHA's four pillars: *academic excellence, student responsibility, parental partnerships, and moral focus*. Additional dynamic components of our school will differentiate us from other nearby schools.

### **Distributed leadership model (Dean model)**

Our school will utilize a distributed leadership model ("dean model") which will see a principal and grade-level deans offering teachers dramatically more observation, coaching, and feedback than teachers typically receive in other school settings and configurations. Deans will serve as mentors for specific grade-level staff (e.g.: K-2, 3-5, 6-8) and will schedule weekly one-on-one meetings (O3s) to review lesson plans and offer strategies, based on frequent classroom observations, and review academic data to help improve personalized instruction.

### **Moral focus**

A great school should develop students' minds *and* hearts. High Point Prep's approach to this goal will be centered on our moral focus curriculum, which embeds lessons on such virtues as prudence, justice, temperance, and fortitude throughout the curriculum. High Point Prep will also hold schoolwide assemblies on these virtues. We will strive to help students build and maintain strong personal character while also developing the qualities necessary to succeed academically and become good citizens.

### **K-8 school design**

As a K-8 school, High Point Prep is designed to make an early investment in the students we serve and to continue that investment steadily until students reach high school. The consistent K-8 schooling experience will provide students with a greater sense of stability, security, and community as they traverse their adolescent years. There are only two district schools in Guilford County offering this structure. There is a demand in Guilford County for the K-8 model as demonstrated by the extensive wait list at NHA-partner schools in the county that utilize this model. Combined, the five NHA-partner schools in the county have a wait list of over 4,500 students.

### **Parental partnerships**

We will foster strong partnerships with parents by engaging them in school life and in their children's learning. We will dedicate one room in the school as a "parent room" for ongoing "anytime" interaction among parents and teachers. We will maintain contact with parents via written communications, calls and voice messages, and meetings – all to inform parents about their children's academic progress, behavioral record, and school news.

### **School-wide framework**



Our partnership with NHA provides us decades of experience producing a clear framework designed to foster outstanding academic outcomes. Our school leaders will be charged with faithfully and consistently implementing these five specific values.

- *Establish a professional culture of excellence:* The principal will lead a community that is motivated to achieve high expectations and that exhibits high care for all members of the community.
- *Systematize collaborative improvement:* Deans, teachers, other instructional professionals, and all staff will work in collaborative data-driven teams, seeking improved student learning through the shared study and implementation of instructional best practice.
- *Lead instructional excellence:* Deans will have focused instructional coaching as the top priority, to ensure high-quality learning for every student in every classroom every day.
- *Implement systematic intervention:* High Point Prep will identify the needs of academically at-risk students, exceptional children, English learners, and students with behavioral challenges, as well as provide tailored instruction and systematically monitor student progress.
- *Cultivate meaningful parent partnerships:* Parents and school staff will authentically connect to understand and support each other in a caring and meaningful way, working in partnership to help every child achieve college readiness.

### **Classroom framework**

To complement the school-wide framework, NHA has developed a classroom framework of four key instructional competencies that we believe will improve academic results for individual students and our school.

- *Classroom culture:* Teachers will strive to lead self-managing classrooms by building positive relationships, sustaining classroom routines and procedures, and holding students accountable to clear behavioral expectations.
- *Planning:* Teachers will plan instruction by identifying and analyzing standards to be taught throughout the year, aligning instructional resources and activities to those standards, and preplanning differentiated opportunities to meet student learning needs.
- *Teaching:* Teachers will deliver content at a level of rigor that challenges students, cognitively engages them, uses all time for learning, and personalizes instruction.
- *Assessing:* Teachers will implement assessment strategies to understand student learning needs, provide actionable feedback, and guide instructional decisions.

**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**



Guilford County is lacking school choice options. High Point Prep will offer additional high-quality educational choice seats on a 21st Century-ready facility at no cost to local taxpayers. To gauge interest in our school, we reached out to 150 families in High Point. We asked if families would be likely to send their student to a new K-8 charter school in the area. (see Appendix A). The results confirmed our belief that there is a strong demand for our school:

- Over 53 percent of families surveyed answered they would be very likely of likely to send their student to a new K-8 charter school in the area; and,
- Nearly 68 percent of families responding asked to be contacted with additional information if a new charter school were to open within the community.

Beyond our positive survey results, our Board circulated petitions to gauge support for a public charter school in our community (included in Appendix A). We collected over 220 signatures from the community. We also know the demand for enrollment with schools who partner with NHA. Overall, there are more than 11,000 students on wait lists at NHA-partner schools in North Carolina.

Parent satisfaction is an additional key indicator of demand for schools. Our school will benefit from strong relationships with nearby NHA-partner schools, as well as those across the state. Our Board, school leaders, and staff will collaborate on ideas, work through experiences, and brainstorm on decision making opportunities to continue our pursuit of achieving our school's mission.

**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 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 Evidence :**


Appendix A - Evidence ...

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by **Kellie Jackson**

**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:

- 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.
- Provide parents and students with expanded choices in the types of educational opportunities that are available within the public-school system.
- Improving student learning.
- Increasing learning opportunities for all students, with a special emphasis on at-risk or gifted students.
- Encourage the use of different and innovative teaching methods.

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



High Point Prep will be an example for North Carolina's legislative purposes for charter schools. Our school will provide opportunities for families that align with the intent of successfully offering a high-quality school choice.

### **Professional opportunities for teachers**

High Point Prep will provide school staff with professional development to assist them in succeeding in their current roles. This will also develop credentials for advancement. Teachers are able to gain additional responsibility as teacher leaders, mentors, and deans by engaging in ongoing professional development opportunities. To assist staff members to become school leaders, NHA offers some deans a training program that helps to earn principal positions. New school leaders are given leadership training throughout the school year. The foundation of opportunity is compensation that is broad and deep, with competitive salaries, merit pay, benefits, and retirement.

### **School accountability**

High Point Prep will hold accountable all stakeholders (Board, leadership, teachers, students, and NHA) for the academic outcomes of our school. We will adhere to the state accountability model. Students will complete state assessments, and results from those tests will be the foundation of our self-evaluation. We will utilize formative assessments in measuring progress and learning needs of our student population, classes, and High Point Prep. A baseline assessment early in each school year will help inform instruction and support student growth. Our Board will require NHA to measure results on operational matters that include parent satisfaction, school finances, and attendance. To maintain our commitment to these metrics, our Board will craft an annual school improvement plan to review relevant dates and plan next steps for the following school year.

### **Expanded educational choice**

High Point Prep intends to open as a high-quality educational choice for families in Guilford County. With over 540,000 residents, Guilford County is the state's third largest county by population. Additionally, High Point is one of the three cities that anchors the Piedmont Triad along with Greensboro and Winston-Salem. More than 1.7 million residents live in the Piedmont Triad and the population continues to grow. With only nine charter schools in the county, our proposed facility will provide additional school seats at no cost to taxpayers. Our configuration of having grades K-8 will differ from the offerings in Guilford County Schools, and our students will benefit from not having to face the transition typically experienced in fifth or sixth grade. Additionally, our school's intended moral focus curriculum will assist students in strengthening their character and enhancing their preparation for high school, college, and beyond.

### **Improved learning**

NHA has a documented record of success in North Carolina that dates back to 1999. Their success with



students has us confident about our school growing students to its full potential. Consider the following:

- Greensboro Academy earned the highest state accountability rating in each of the last five years with publicly available data.
- In 2018-19, 11 of 13 NHA-partner schools with state assessment results met or exceeded growth. That year, seven of these schools outperformed the local district in both reading and math, and 10 outperformed the district in either reading or math.
- In 2018-19, eight out of 13 NHA-partner schools outperformed their closest schools in both math and reading.
- Six NHA-partner schools in North Carolina have recently earned full 10-year renewals.

### **Increased learning opportunities**

Our school will cultivate and foster a school community focused on innovation to meet the needs of all students. We intend to prepare students for high school, college, and career by emphasizing blended learning, small-group learning, and online learning tools and results from aligned assessments. This will assist in personalizing and differentiating instruction to maximize flexibility for teaching and learning.

### **Instructional innovation**

Instructional staff will benefit from ongoing professional development, scheduled planning time with peers, weekly coaching, and collaboration with a professional learning community. These will encourage design and implementation of creative variations on best practices.

## **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.**



The High Point Preparatory Academy Board is committed to reviewing and monitoring student achievement. We will strive for excellence and hold both High Point Prep staff and NHA accountable as we pursue our goals. We intend for our goals to be similar to those in place at other NHA-partner schools in North Carolina and across the nation. We believe it is in the best interest of our school to implement these as well.

We propose the following academic goals for our first five years of operation:

- Students in kindergarten and first grade will score at/above the 60th percentile in both reading and math, as measured by start-of-year to end-of-year learning growth on a nationally normed standardized assessment.
- By the end of the initial charter term, High Point Prep students will exceed the average performance of local district students and closest located schools on state assessments.
- Students returning to our school after seventh grade will successfully finish Math I (formerly Algebra I) by the end of eighth grade, and will also earn a passing rate of 75 percent on the Math I end-of-course exam.
- Each year, the mean normal curve equivalent gain on the Education Value-Added Assessment System will be, at a minimum, "Meet Expected Growth." We intend to exceed the state standards of expected progress by the end of the initial charter term.

Our goals will be a barometer of how well our school is performing. Our intention is to meet our goals, but we will not be satisfied with doing so. Our Board will make adjustments, as necessary, during our annual school improvement planning to spur ongoing growth.

The North Carolina Department of Public Instruction (NCDPI) requires administration of a national assessment of college readiness to every eighth-grade student. Our school will do so and collect and analyze the results to create a tailored plan for each student to succeed in high school, college, and beyond.

We expect our school to achieve operational goals as well. These include:

- Each year, the school will average a student attendance rate at or above 93 percent.
- Each year, the school will have an overall parent satisfaction rate of 80 percent, with at least 50 percent of parents responding to our survey.
- Each year, our Board of Directors will review the performance of, and provide feedback to, our education management partner. This will allow the Board of Directors to identify the management partner's successes and opportunities to improve its future performance, as well as ensure that the Board and management partner's relationship is effectively serving the school.
- Each year, the school will receive an unqualified audit.

We will be provided ongoing status update reports on High Point Prep's progress toward goals during each monthly Board meeting. We will receive detailed information covering sections of each goal that include the performance of subgroups within our student population (EL, new students, FRL, EC, etc.). Families will receive ongoing periodic informational newsletters and updates that include the school's current progress



and standing.

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



The mission of High Point Prep will guide the decisions we make as a Board. We will place at the center of our discussions our mission and vision for our school to ensure we remain focused on the best interests of the school with regard to academics, operations, and finances. Four key questions will guide our conversations:

- Are our students on track to attain High Point Prep's mission and charter goals?
- Are we collectively embodying parental partnerships?
- Are we being strong stewards of school funds?
- Do we comply with state and federal laws, rules, and requirements?

Enrollment will be a key early indicator of our school's success. We anticipate receiving more interest in High Point Preparatory Academy than the number of seats we intend to initially offer. As indicated by an anonymous survey of 150 families, nearly 68 percent expressed interest in a new school choice. Additionally, over 55 percent of those responding said the quality of education for their child to be average, at best. This leads us to believe we will receive interest from families across Guilford County. This would result in a wait list upon the beginning of the school year. It will also reinforce the notion that families desire additional school choices in our community. We intend to begin with grades K-5. We will grow by one grade each year until we offer a full K-8 grade configuration.

We will require our principal and NHA to provide the Board with regular reports on student performance, assessment data, operational data, and any parent survey data. A review of this data will be a standing agenda item for all Board meetings. We will use this information to analyze High Point Prep's progress towards our performance goals and performance of the principal. We will have conversations about any hurdles to meeting objectives and work together to identify solutions. Among the reports we will regularly review are:

- Growth in student learning.
- Absolute and comparative student performance on internal diagnostic and interim measures.
- Status on applicable federal and state accountability systems.
- Data regarding our student population (demographics, FRL, EL, and EC counts) and performance achievement levels broken out by subgroups.
- Status on college-readiness.
- Parent satisfaction.

Our Board will also review operational data, including on enrollment, attrition, attendance, discipline, and more. School leadership and our Board will regularly discuss the school culture, professional development and its impact, attendance and enrollment trends, the level of parent and community involvement, internal academic measures, rewarding staff performance, and any employee complaints or issues. Staff and parents must also be informed of the school's standing with regard to each of our performance goals. For goals that have a single measurement point, we expect to inform the community on an annual basis. We also intend to analyze trends, including attendance rates, to forecast our projected annual results. We will



report to our community regularly on our performance, as required by state and federal laws.

On an ongoing basis we will review how High Point Prep is operating, teachers are delivering instruction, and students are learning. Requiring these regular reports and updates, our Board will work with NHA to provide the appropriate resources to ensure we do not fall short in a particular area.

Our Board will have a commitment to development, and will participate in the online and in-person trainings available from the NCDPI Office of Charter Schools that will assist us in governing High Point Prep. Additional training will be utilized from groups that include the North Carolina Association for Public Charter Schools and the National Association for Public Charter Schools.

We may also contract for an independent evaluation of NHA's performance to make certain we are meeting all requirements of our charter and that we are satisfied with High Point Prep's performance.



## 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



High Point Prep will offer a high-quality educational choice for families within our community. We will design our programming in partnership with NHA, and our instruction will be based upon our four foundational pillars: *academic excellence, student responsibility, parental partnerships, and moral focus*. Our intention is for our school to offer an instructional program that is research-based, data-driven, and aligned to state standards. We will do so to prepare students for high school, college, career, and the lives that they will lead. We will make sure our instructional program is advancing the legislative purposes of charter schools.

### **Schoolwide instructional methods**

Our instructional program and school culture will engage families through NHA's organizational frameworks. We will implement these for our school and classrooms.

School-wide framework: Our principal will be charged with faithfully and consistently implementing these values to drive student learning. There will be five specific elements to the school-wide framework at High Point Prep.

Classroom framework: To complement the school-wide framework, NHA has developed a classroom framework of four key instructional competencies that we believe will improve academic results for individual students and our school community. High Point Prep will adopt this framework to accelerate student learning:

- *Classroom Culture*: Teacher leads a self-managing classroom by building positive relationships, maintaining physical space, sustaining classroom routines and procedures, and holding students accountable to behavioral expectations.
- *Planning*: Teacher plans for instruction by identifying and analyzing standards to be taught throughout the year, aligning instructional resources and activities to those standards, and preplanning differentiated opportunities to meet individual learning needs.
- *Teaching*: Teacher delivers content at a level of rigor that challenges students, cognitively engages them, intentionally uses all time for learning, and personalizes instruction.
- *Assessing*: Teacher implements assessment strategies to understand student learning needs, provide actionable feedback, and guide instructional decisions.

### **Meeting the needs of target student population**

Our commitment to data-driven instruction will enable us to continuously evaluate and refine the instructional methods we choose and to differentiate instruction in culturally responsive ways to meet specific learning needs of individual students. Our community of educators will hold regular data meetings at which deans will lead a review of results from previous assessments. These work sessions will help teachers use data to modify instructional plans and personalize instruction. High Point Prep will complement these efforts with robust professional development for teachers to ensure that they have the skills and knowledge to analyze assessment data and use insights from that data to refine lesson planning



and instructional tactics.

Teachers will also implement strategies that help students take responsibility for their learning. Teachers will help students set individualized goals, and then will use these goals as an instructional tool. In this way, both students and teachers embrace a clear understanding of the desired focus skill, and teachers are empowered to articulate what they are teaching while allowing students to describe what they are learning and to work at the appropriate level of difficulty (see R.J. Marzano, *Designing & Teaching Learning Goals & Objectives*, 2009).

Rigor: Content will be taught at an appropriate level of rigor that cognitively engages students, intentionally uses all time for learning, personalizes instruction, and ultimately challenges students to drive their own learning. This will build student responsibility while providing instruction that is engaging to each student. This includes:

- *Instructional rigor*: Teachers will communicate measurable learning goals and deliver challenging content for each student and give them opportunities to engage in higher-order thinking processes to interact with the content in a deep and meaningful way.
- *Cognitive engagement*: Teachers will use effective instructional strategies to cognitively engage students; creating student ownership for their learning.
- *Use of time*: Teachers will demonstrate urgency for learning by pacing lesson delivery and activities in a way that maximizes the use of time and creates a balance between instruction and opportunities for student processing.
- *Personalized instruction*: Teachers will use preplanned corrections and extensions in whole-group, small-group, and individualized settings, to meet learning needs.

Teachers will build upon students' prior knowledge, challenging them beyond what they have encountered before. Research has shown that students demonstrate increased motivation, responsiveness, and engagement in class through their writing, discussions, and reading when they are cognitively engaged with higher-order questioning, varied instructional strategies, and integrated technology-driven learning tools. Pacing of content and instruction will be a key instructional focus to maximize time and create the urgency necessary for optimal learning.

We will also use alternative teaching models, such as co-teaching for exceptional children, and will integrate this into our classroom framework as dictated by the needs of our students.

Personalized instruction: High Point Prep will use small-group and blended learning to personalize instruction. We expect students to enroll at High Point Prep with significantly different needs. To meet each student at their instructional level, we will use small-group instruction regularly.

High Point Prep will focus on small-group instruction and effective learning strategies, including ways to effectively facilitate and pace student-driven instruction. Currently, it is anticipated that most lessons will



begin with a small block of direct instruction, and then students will transition to small-group settings. The plan is to equip each classroom with approximately enough Chromebook devices for each student and leverage software platforms such as i-Ready. Teachers will also establish opportunities for collaborative and inquiry-based learning to deepen students' understanding of various topics. Independent work will be assigned as appropriate, so students can practice applying previously learned concepts and, in the process, develop higher-order thinking skills.

Blended learning: To customize learning, we may use online learning tools to create a blended learning environment. Small-group and blended learning approaches enhance flexibility on the time, pace, and place students learn. At first glance it may seem like students are simply completing lessons at the computer – but programs like i-Ready gather valuable information and transmit it to teachers. With this wealth of information available in real time, teachers can more effectively customize learning to each child's needs. The benefits of blended learning will be to:

- *Ensure that each student's education is specific for his or her needs.* Blended learning helps to pinpoint where each student is on his or her educational path. Our teachers will create appropriate challenges based on each child's unique ability. For instance, if a student is exceptionally strong in language skills but weaker in math, a teacher can craft greater opportunities to move beyond the average grade level of material for English, while simultaneously providing remediation to improve math skills. This model varies for each student, making teaching and learning highly fluid and individualized.
- *Encourage greater classroom collaboration.* In traditional learning, student collaboration happens only in face-to-face interactions. Blended learning adds secure online group work, online discussions, email, instant messages, blogs, and electronic portfolios.
- *Allow students to create live presentations, labs, performances, and exhibits of skill through models, works of art, and posters.* Teachers will also have more capacity for disseminating information and testing by incorporating online surveys and quizzes, assignments that include slideshows, photographs, and videos.

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

- Yes
- No

**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.**



### **Learning environment and structure**

Each classroom will be structured primarily as a direct-instruction model. Teachers will be effectively trained and frequently coached to employ a variety of instructional approaches and to personalize instruction as appropriate. Teachers will establish opportunities for collaborative and inquiry-based learning to deepen students' understanding of various topics. Independent work also will be assigned as practice for applying previously learned concepts and to promote the development of higher-order thinking skills. Small-group settings will engage students with the standards at their current level of learning. A blended learning approach will be used to target instruction and skills practice based on individual needs.

### **Small-group instruction**

In order to meet each student at their individual level and effectively use our resources, we intend to leverage technology during small-group instruction. It is our intent that each classroom has Google Chromebooks for every student to leverage software platforms such as i-Ready. The i-Ready program is an online math and reading program that individualizes instruction for students and instantly downloads cross-grade-level assessments that identify areas of weakness.

### **Class size**

When High Point Preparatory Academy ultimately serves all of grades K-8, we will have four kindergarten classes with approximately 25 students each. In grades one through eight, we are planning to serve approximately 28 students per class. Through our high expectations for student behavior, small-group instruction, and blended learning components, this class size will serve us well.

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



Our K-8 curriculum has been carefully aligned to the North Carolina state standards and North Carolina Accountability Model by NHA. It is in use at 15 NHA-partner schools across the state.

### **Alignment to mission**

The progression of standards in our curriculum is designed to ensure that we prepare students for success in high school and in college. The academic rigor and our culture of high expectations align with our mission to help every student, K-8, discover a path to college, a career, and beyond.

### **Alignment to student population**

We expect to enroll students who have academic deficits, others who are learning at grade-level, and others who are intellectually gifted, but we are not targeting our enrollment efforts at any specific population. Our curricular tools and instructional practices will ensure that the curriculum is properly driving learning for all students who enroll.

### **Planned components**

Our school will benefit from the curriculum developed by NHA, which meets and exceeds North Carolina requirements. We have included more detail regarding our specific curricular tools and an alignment to standards in Appendix B of this application.

### **Alignment to accountability model**

We will use our instructional framework to ensure that the curriculum and instructional approaches are producing academic gains for our students and that achievement is on track to meet and exceed the measures in the state's Accountability Model.

**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.**



### **Mastery of instructional strategies**

Teachers at High Point Prep will be expected to use a variety of instructional methods that provide the most effective way to enhance learning for each individual student. Our primary methods will include direct instruction, modeling, demonstration, and think-alouds. Guided instruction may be done with large groups or with small, needs-based groups during workshop time or during content-area learning blocks to allow for differentiation of instruction. A blended learning approach will also be used during workshop to meet the individual learning needs of students at all levels, and our classrooms will be equipped with enough Google Chromebooks for each student as part of our 1:1 technology policy.

Teachers will use various methods to promote engagement, describe instructional intent explicitly, and implement appropriate rigor. Focused lessons will include direct instruction, modeling, demonstration, development of higher-order thinking strategies, and think-alouds, among other methods, and will be conducted in whole-group or small-group settings as student needs dictate. Guided instruction may be done with large, small, and needs-based groups during content-area learning blocks or workshop time for differentiation of instruction. Collaborative learning will be used to provide opportunities for students to learn from peers, to discuss ideas, and debate findings, or to participate in inquiry-based learning of curricular content. Independent work will be assigned to give students time to practice applying skills or knowledge they have previously learned, to extend individual learning through the application of knowledge and skills to novel situations, or to promote the development of higher-order thinking skills.

Teaching will include effective, research-based instructional strategies embedded within daily lesson plans and implemented daily. Strategies that have high probabilities of effectiveness will be employed by teachers to meet student needs, including instructional strategies identified as highly effective by researchers at Mid-continent Research for Education and Learning (McREL).

Additionally, because effective learning requires that teachers shift the cognitive load to students in a purposeful and intentional way, teachers will develop students' knowledge, understanding, and skill incrementally through appropriately planned sequenced lessons and units of instruction.

Instruction will be designed to promote high achievement and meet the needs of all learners within the classroom. Throughout instruction, teachers will ensure that the formative assessment process is implemented with fidelity and that classrooms exemplify engagement, clarity of instructional intent, and rigor. School leaders will work individually with teachers to ensure that appropriate teaching techniques are used to enhance student learning and promote high expectations. Teachers will receive support from deans through focused professional development and weekly observations, subsequent coaching, and feedback sessions to ensure that they successfully implement teaching techniques that have been shown to promote student learning.

Teachers will drive instruction at our school with an intentional and collaborative planning approach of



three sequential and interrelated steps: year-long planning, unit planning, and daily planning. Our formative assessments will inform planning by offering frequent and varying measures of progress to help determine the best approaches to teaching and learning.

Teachers are expected to implement strategies that help students take responsibility for their learning. This includes using learning goals as an instructional tool and helping students set individualized goals for themselves. Through this approach, both students and teachers are provided a clear understanding of the desired focus skill, and teachers are empowered to articulate what they are teaching while allowing students to describe what they are learning and to work at the appropriate level of difficulty (see *R.J. Marzano, Designing & Teaching Learning Goals & Objectives*, 2009).

### **Increased academic achievement**

These instructional strategies provide a comprehensive approach of delivering educational content while incorporating the flexibility to adapt instruction to meet individual student needs and learning styles. Combined with the use of formative assessment to provide multiple measures of student performance data, our school as a whole will be able to adapt the delivery of educational content as student needs dictate. This is expected to result in the ability of each student, regardless of his or her academic starting point, to make measurable academic progress throughout the school year. Our approach is designed for student academic success and will build upon foundational content and skills in the early grades to implement more complex inquiry and learning strategies in the later grades.

**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.**



High Point Preparatory Academy students will be expected to progress academically through one grade level each year. Our program is designed to ensure that students are prepared for high school, college, and/or career.

Our principal will have the final decision regarding the promotion, acceleration, and retention of students. If a student fails to meet the third-grade requirement of the North Carolina Read to Achieve mandate, additional interventions and a personalized and monitored reading improvement plan will be offered. We will not promote students who have failed to master grade-level curriculum. A variety of structures and procedures will be incorporated into our school model to ensure that students do indeed receive the content, instruction, and interventions necessary to progress academically as expected. Our deans will serve as the direct managers for teachers and will ensure that instructional plans are aligned and scaffolded appropriately across grade levels to ensure smooth student transitions.

High Point Prep will use formative assessments designed to include multiple checkpoints throughout instruction that measure students' understanding of content. Teachers will analyze data at the classroom and individual student levels and then scaffold towards student mastery of each objective. Short-cycle formative assessments will enable teachers to determine exactly what knowledge needs further development in each student. School leaders will consistently review data to ensure that the school's curriculum and instructional approach are accelerating student learning. This information will be shared with our Board regularly.

For students who struggle and show indications that they may not acquire the expected knowledge and skills planned for a particular grade level, we will have a formal, comprehensive, progressive structure of intervention designed to bring those students back on track. Intervention programming, supported and informed by the formative assessment process, is designed to ensure that by the end of one grade level students are academically ready to transition to the next grade.

At various times throughout the school year, we will administer assessments to students that are norm-references to supplement the state tests. Analyzing the results of these assessments will give us snapshots in time of how High Point Prep students are comparing with students in schools across the area, North Carolina, and the country. School staff and leaders will utilize assessment results to inform instruction for each student, allowing High Point Prep to meet students at their learning level and foster ongoing growth.

**Q122. Describe in a brief narrative how the yearly academic calendar coincides with the tenets of the proposed mission and education plan.**



At High Point Preparatory Academy, instruction will be organized around a master schedule in which every attempt will be made to schedule math and ELA/reading courses in the morning and maintain science and social studies as focused priorities. This is designed to ensure priority attention is given to core subjects. The proposed schedule provides time for daily grade-level team planning meetings while students participate in special and co-curricular areas (e.g., music, art, and physical education, etc.). Grade-level planning teams will meet at least weekly to adjust teaching on the basis of student learning evidence. This approach to instruction will allow students to be critical thinkers, active collaborators, and eager contributors to their own learning.

The proposed calendar has been designed to provide students with the opportunity to learn the content included in the school's curriculum while providing instructional staff with the support and professional development they need to grow as teachers. The additional hours of instructional time will ensure the effective implementation of our mission as well as foster an environment that values high academic and moral character standards, clear expectations, and quality instruction.

**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.**

Our ideal school year calendar to be utilized at High Point Prep is a standard calendar. Our year begins in August and ends in June (draft calendar included as Appendix D). We will align our school year calendar with the Guilford County Schools' calendar.

As currently envisioned, our school day will last seven hours, beginning at 8:15 a.m. and ending at 3:15 p.m. We will provide 6.5 instructional hours each day. Our structure will offer families additional educational time beyond the traditional district schools in our area.

Anticipating that we will provide roughly 1,100 hours of instruction each year, our school will exceed the required minimum instructional hours.

We have included in our calendar 16 professional development days. Seven will occur prior to school and nine will occur during the school year. We will schedule two parent-teacher conference days. We believe teachers and staff need to be in the classroom, just as we expect our students to be, and we will hold teachers and staff accountable for absenteeism. Of course, we may modify our schedule based on the needs of the students who eventually enroll.

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



We intend for each day at High Point Preparatory Academy to be engaging for students and offer a well-rounded educational experience. Outlined below is a potential typical day at our school, but it is not representative of the entire hands-on learning that will take place for our students. It is focused on classroom instruction and regular school day routines. We have offered an example based on experiences at other NHA-partner schools in North Carolina. We will tailor our day to meet the needs of our student population.

### **Typical day**

Teachers will arrive at our school approximately 30 minutes before the instructional day is scheduled to begin. Teachers will use this time to prepare for students and create an initial assignment for students, often referred to as a "Do Now." For this typical day, Ms. Jones is a second grade teacher. Students will enter the classroom and Ms. Jones will begin with instruction in English language arts. High Point Prep will have a balanced literacy focus and Ms. Jones will have 130 minutes of instruction in reading that will take place through whole group instruction and read alouds; small group instruction with technology; and, independent work. After this learning block, students will transition to mathematics as High Point Prep plans to prioritize learning in these two core subjects in the morning. Students will begin with a math story, which is a word problem that stimulates higher-order thinking skills to frame, solve, and explain a math computation. Ms. Jones will ask her students to work in small groups to discuss and present their answers. Students will go to recess and have a snack while Ms. Jones prepares for the next part of the math lesson.

Ms. Jones and her students will resume math instruction, again working in both large and small group settings. After the math period of 75 minutes finishes, Ms. Jones and her students will begin a science lesson. Ms. Jones will make connections from the math instruction to science as possible and will help students to see the real-life applications of their learning. Next, Ms. Jones and her students will go to lunch. Students will eat in the gymnasium first and then will have lunch recess. Ms. Jones will use this time to eat lunch, talk with her colleagues, and prepare for her next lesson.

In the afternoon, Ms. Jones and her students engage in a lesson on social studies. As possible, Ms. Jones will make connections to the English language arts block and the read aloud text from earlier in the day. Students then proceed to a specials class. Today's class is music, where students are beginning to work on two new songs for an upcoming concert. During this time, Ms. Jones will meet with her grade-level team to analyze data from recent assessments and to begin planning for the upcoming units.

Students will return to the classroom for the final lesson of the day, which will highlight the monthly moral focus virtue. Students will discuss the virtue and how they have seen it applied in their classroom. Ms. Jones will wrap up the day with her students with a read aloud on the virtue and students will prepare to go home. Students will gather their belongings, ensuring that they know their homework assignments and have any papers to take home. High Point Prep will use a system called Drive Line, explained in more detail later in this application, to dismiss students in a safe and secure fashion. Students will remain in the



classroom with Ms. Jones until their family is called and will then proceed out to the designated pick-up area. Some students may remain at school for after-school tutoring or care until their parents come to pick them up.

Ms. Jones will head to the media center for a quick staff meeting with updates on future school events. A more in-depth meeting is planned for next week, where staff will be analyzing data from beginning-of-the-year assessments to personalize instruction for students. Ms. Jones will head back to her classroom to briefly tidy up and prepare for the next day. Ms. Jones may also take a few minutes to connect with parents via the Parent Portal to share good news about their child's learning or to provide informational updates to all families.

**Q125. Will this proposed school include a high school?**

- 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 Evidence :**


Appendix B - Curriculu...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

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

Upload Required File Type: pdf, image, word Max File Size: 30 Total Files Count: 3



Applicant Evidence :



Appendix D - Yearly Ac...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

**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 Evidence :



Appendix E - Daily and ...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

## 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.**



High Point Prep will maintain a comprehensive process to ensure all students who require intervention are identified, served, and monitored. We will utilize a systematic intervention program designed to stimulate early action that helps prevent academic failure and maximizes the effectiveness of grade-level instruction. Our school will comply with the NC Read to Achieve mandate. Our process is based upon a framework that consists of six key practices. These include:

- *Schedule intentionally:* A strategic schedule is set for the delivery of all needed services to each identified student. Scheduling also will accommodate the dedication of the most skilled interventionists to the students with the highest needs.
- *Create collaborative teams:* Intervention staff and classroom teachers will meet every four to six weeks to discuss student assessment data, monitor progress, and update intervention plans. This monitoring also will include students recently exited from intervention services.
- *Allocate resources appropriately:* School leaders, with NHA staff, will collaborate to ensure that funds are allocated in ways that will allow the school to maximize resources to best meet student needs.
- *Develop intervention plans:* Internal diagnostic assessments will be used to determine student needs, with data supporting the initiation of intervention services shortly after enrollment in the school. A written plan will be developed that details the interventions that will meet student needs and will be updated regularly.
- *Monitor progress:* Students struggling to make progress will be assessed at a minimum every two weeks, and those students identified with the most severe academic needs will be assessed weekly. Intervention goals will be set individually for each student based on these monitoring results.
- *Provide professional development:* One-on-one meetings between school leadership and intervention staff will be scheduled and weekly coaching sessions will be set to focus on individual student data and strategies being used to meet student needs.

Within this systematic intervention framework, we will follow a three-tiered approach to provide intensified academic support.

- *Tier I intervention:* In Tier I, classroom teachers will respond to student learning needs within the context of regular classroom instruction. The initial screening assessment used at the beginning of each school year will be used to define the needed individualized instruction. During the school year, we will leverage our formative assessment process, classroom assessments, NHA's common assessments, and a benchmark assessment to ensure individual student learning progresses appropriately.
- *Tier II intervention:* If a student does not master content through the first tier of intervention as measured by the assessments in the previous section, or if early screening shows significant academic deficits, more prescriptive Tier II interventions will be used. This includes supplemental instruction and coaching using programs and approaches that are proven to accelerate student learning. These well-researched intervention programs will be used to quickly increase student achievement. Other intervention strategies may be provided in the classroom in a workshop setting or delivered through supplemental support outside of the general education classroom during non-core educational programming.
- *Tier III intervention:* If progress monitoring data shows that a student is not making sufficient progress



after Tier II interventions, the student will be moved into Tier III interventions. Tier III interventions will include an intensified approach that focuses on selected high-priority reading and math skills. Depending on the need, one-on-one concentrated tutoring will also be considered whenever appropriate. If these interventions do not succeed, the school's EC team will meet with the student's parents and may recommend an EC referral meeting.

**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.**

As our Board intends to partner with NHA, a benefit of that partnership is its longstanding expertise in identifying and meeting the needs of all student populations. As noted, High Point Prep will have a comprehensive approach to identify students who may be struggling academically upon enrollment with our school. Prior to enrollment, we will seek out student records, including assessment outcomes, from a student's prior schools. This will assist in learning if that student was receiving services as part of an IEP, Section 504 Plan, or due to other academic needs. Our staff will be prepared to meet student needs and we will hire team members accordingly.

**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.
4. Means for providing qualified staffing for EL students.



High Point Prep will have an unwavering commitment to make sure EL students have access to both high-quality education and instruction. Given our intended search area, we anticipate serving an EL population similar to surrounding schools.

All teachers at High Point Prep will be teachers of ELs. Our program for EL students will be designed to make sure these students receive essential academic vocabulary, knowledge, and skills needed for academic success within our school and beyond.

### **Methods to identify EL students**

High Point Prep will work with our students and families to identify EL students through home language surveys and the WIDA-ACCESS Placement Test (W-APT).

All new students entering will complete the Home Language Survey (HLS). Should it be indicated that a student's home language is English, the screening process will be discontinued. If it is indicated through the HLS that a student's home language is not English, our staff will conduct an informal interview with that student in his/her native language and in English. Upon confirmation that a student is potentially an EL, the student will take the W-APT.

When a student scores at the "commanding bridging (proficient)" level on the W-APT, the screening process will discontinue. When a student scores at the "entering," "emerging," "developing," or "expanding" level, that student will be eligible for High Point Prep's EL program. All EL student information will be recorded within our school's student data system.

As our screening process takes place, our EL staff will take appropriate measures if a student is one with a disability that enrolls with an IEP or if the student has had interrupted formal education, adhering to the process defined in the WIDA Resource Guide. The parent or guardian in parental relation to an EL student will be notified, in English and in their native language, of their child's eligibility for the EL program. Each EL student who is a new entrant will be offered an orientation session with his/her parents or guardians on the state standards, assessments, school expectations, and an overview of the EL program. This orientation will take place within the first semester of the child's enrollment in the school and, when needed, will be provided in the first language of the student's parents or other persons in parental relation to the student. Parents or guardians will also receive written notification, in English and in other languages as necessary, of the identification of their child as an EL student, the programs available to their child(ren), and their right to refuse such services. The school will make every effort to meet with the parents or guardians of EL students, at least twice a year, to help them understand the student's progress.

Students will take the ACCESS assessment for ELs annually, along with the state assessments for their grade level. The results of these assessments will be used to continually update and modify the plans of assistance for each student, as well as to determine the criteria to exit our EL program, as described below.



Specific instructional programs, practices, and strategies: High Point Preparatory Academy will implement an effective, research-based approach to accelerating English language acquisition for EL students that includes Sheltered English Immersion (SEI) in the general classroom, as well as specific language acquisition instruction called English Language Development (ELD). SEI is the vehicle for the acquisition of grade-level content, while ELD is driven by the need to increase proficiency in English and specifically the academic English necessary for success in school.

- SEI is the provision of an immersion environment, where all classroom instruction is delivered in English by the classroom teacher with an awareness of the unique characteristics and needs of ELs, and additional realia, scaffolding, and background knowledge provided during the course of lessons (*Genesee, Lindham-Leary, Saunders, and Christian, 2006*). The hallmarks of effective teaching and learning, such as the nine instructional strategies in *Classroom Instruction that Works*, the formative assessment planning process, the NHA Curriculum, NHA's proven best practices, and differentiation to meet individual student needs, remain in an SEI classroom, with additional language supports in evidence. SEI is also referred to as Sheltered Instruction or SDAIE, Specifically Designed Academic Instruction in English.
- ELD is focused on helping students acquire social and academic English. The SEI classroom enables access to the grade-level content, despite a lack of proficiency in English, while ELD is intended to dramatically increase the level of proficiency. ELD combines "a) explicit teaching that helps students directly and efficiently learn features of the second language such as syntax, grammar, vocabulary, pronunciation, and norms of social usage and b) ample opportunities to use the second language in meaningful and motivating situations." (*Goldberg, 2008*) Students that are provided with ELD in a separate block have been shown to have "modestly but significantly higher English oral language and literacy scores" (*Saunders, 2006*) as teachers focused on developing oral literacy in English. ELD should take place as a supplement to the defined ELA instruction, not in place of such instruction, and will frequently take place outside of the general education classroom, though not always. ELD is also referred to as English as a Second Language (ESL) or Teaching English to Speakers of Other Languages (TESOL).

Our school will dedicate resources to successfully close achievement gaps for our EL students. All High Point Prep staff will receive professional development on strategies for working with and engaging EL students and parents. This will ensure all staff members take ownership for our EL students and will be equipped with the needed tools to meet student needs. EL students will be included in all school classes and activities. Instructional materials for ELs will be evaluated and selected based on the proven success of the tools in meeting the needs of similar populations of EL students. Materials that include Pearson's Language Central may be considered/implemented targeting students at the "developing" or "expanding" levels of W-APT. Materials such as Pearson's Newcomer Phonics will be considered and/or implemented targeting students who are new to the United States or at the "entering" or "emerging" levels of the W-APT. Additionally, leveled libraries specific for ELs will also be available.

Our school will make adjustments to staffing, as necessary, based upon the enrollment of students. A member of the staff will also be designated as High Point Prep's EL coordinator to organize EL data,



schedules, and make sure that EL students are not over-classified as students with special needs. This team member will assess the needs of our school to offer additional services in order to meet EL student needs.

Our school will have a commitment to ensure EL students and parents are included in curricular and extracurricular activities, not restricted by an inability to fluently speak/understand the language of instruction. This includes any and all before- or after-school tutoring and summer learning programs. Our school will offer parents or other guardians of EL students school-related information in English, and/or when needed/feasible, in their dominant language.

*Plans for monitoring/evaluating the progress/success of EL students:* High Point Prep will track the academic achievement of EL students and progress being made towards proficiency in English. Our school will implement measures to monitor progress, including the progress-monitoring tool available within our program curricular tool, classroom assignments, formative assessments, grade-level assessments, North Carolina assessments, and the ACCESS for ELs. EL students at High Point Prep will be required to take part in the state's ELA, mathematics, science, and social studies assessments that may be administered in English or alternative language with approved EL accommodations. EL students who have been enrolled in a school in the United States for less than one year are not required to take the ELA assessment and may take the ACCESS for ELs in its place.

In order for an EL student to exit the EL program, the student must score at the proficient level on the ACCESS assessment for ELs. Additional exit criteria will also be considered to ensure that the student is ready to be exited from the EL program with limited supports. Students will be monitored for two years after exiting the EL program. High Point Prep will track the grades of the monitored students and will intervene as necessary to promote and ensure academic success. Family involvement, high expectations, and active learning techniques will continue to encourage individual students to achieve greater academic success after exiting the EL program.

*Means for providing qualified staffing for EL students:* All students identified as ELs will have a Language Acquisition Plan created that documents their level of proficiency in English (overall and in the domains of listening, speaking, reading, and writing), provides student-specific goals for each domain of language, and contains all accommodations/modifications to be utilized in classroom instruction and on assessments, as appropriate and allowable.

This plan will provide a common understanding of the needs of each EL student for the classroom teacher and EL staff. Additionally, the school will use the plan to coordinate between staff members on how to meet the needs of the student in language acquisition and academic achievement and to communicate progress or newly identified areas of need.



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.



We believe students with exceptional gifts and talents deserve appropriate direction, encouragement, time, and resources to maximize potential. High Point Prep will partner with parents and students to both identify gifted students from all backgrounds and to offer instruction nurturing and growing excellence.

### **Methods to identify gifted students**

High Point Prep will utilize an assessment in reading and math for all students beyond the state tests. To make sure students continue their academic growth, our school will be committed to continuously monitoring student progress and adjusting learning opportunities if growth is not adequate. Classroom teachers will monitor mastery of curricular content in addition to these assessment results. Our process will let the school identify students who achieve at the very highest levels. This is a potential indicator of identification as gifted.

*Specific research-based instructional programs, practices, strategies, and opportunities:* Our classroom teachers will provide gifted and talented students with differentiated instruction and extended opportunities across an array of means. These will include enrichment lessons, exercises, and content; differentiation in content, process, products, and/or learning environment; infusion of tasks requiring higher-order thinking skills; and individualized learning opportunities. When necessary, High Point Prep will accelerate grade-level/content-level learning for individual students, considering a student's specific needs. Students achieving at or above grade-level proficiency will consistently be challenged with classroom curricular content and high-quality instruction.

If desired, we may create an entire accelerated cohort group that will include both students who are above grade-level proficiency and designated as gifted and talented. This will allow an entire student subgroup to move through the curriculum at a more rapid pace, paired with teachers particularly suited for instruction to these students. This allows opportunities for students to be systematically challenged with higher-order thinking skills and project-based learning within a common peer group, and it allows the opportunity for the creation of an accelerated section at each grade level.

Our professional development program will also include training on gifted and talented students. School leaders will work with teachers to develop plans for addressing the needs of identified gifted and talented students and evaluate services for progress toward learning goals. Other topics for professional development may include professional learning communities, differentiated instruction, and co-teaching strategies targeted to gifted and talented students. Deans will observe and meet weekly with staff to review lesson plans and provide feedback on instructional quality and effectiveness in meeting the needs of all students, including those who are gifted and talented.

## **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 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.**

High Point Preparatory Academy commits to being a school that will serve all students and have the proper preparation to service exceptional children beginning on our first day. Once a student enrolls with us, parents/guardians will be asked to indicate if their student has an Individualized Education Program (IEP) or Section 504 Plan and to provide a copy of records.

Our dean overseeing special education, corresponding classroom teachers, and the special education teacher will receive all provided information. High Point Prep's registrar will request a copy of all school files, including special education and Section 504 records from the child's prior school. Upon receipt, the registrar will review all student files to determine if the student received special education or Section 504 support. If the student received special education or Section 504 support and these records were not provided by the parent or received in the student's cumulative file, then the registrar will immediately request the missing records from the student's prior school/district. School leaders and appropriate staff will then be notified of this information. Upon receipt of a student's current IEP or Section 504 plan, staff will complete the transfer process consistent with state and federal requirements. Comparable services, consistent with the received IEP or Section 504 plan, will be provided until the IEP or Section 504 plan is accepted or a new IEP or Section 504 plan is developed, consistent with state and federal requirements.

If a complete special education record is not received within 14 days and we believe that the student may have an IEP, the school will contact the prior school. If we do not obtain that info, the school will initiate the special education referral or re-evaluation process. We will identify students with special needs when they enter the school with an active IEP or when they go through our Intervention Assistance Team (IAT) process, as described below.

**Q139. Provide the process for identifying students who may be eligible for special education**



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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.



As some students might enroll with High Point Preparatory Academy without an active IEP or identified special need, we understand the responsibility is ours to identify those who may require special education services under IDEA or Section 504, consistent with state and federal Child Find requirements. We will maintain many strategies to identify students with special needs.

### **Student identification**

If a student is experiencing academic and/or behavioral difficulties in the general education setting, a teacher, other educational staff, and/or the parent may refer the student to the school's Intervention Assistance Team (IAT). This team will include the principal (or designee), a classroom teacher, and the referring teacher. The student's parent or guardian will be invited to participate in this meeting and share more information. The IAT will review and analyze screening information/data, Rtl results, and data on classroom performance, discipline, and state assessments, as well as information provided by parents. We will use this data and information to determine the best educational/behavioral interventions for the student and service/support options (e.g., counseling or school social work support). Outcomes of this meeting may include:

- Continuation of current intervention and progress-monitoring through the Rtl process.
- Implementation of additional interventions through the Rtl process.
- Referring the student for a Section 504 evaluation.
- Referring the student to the special education team for consideration of a comprehensive special education evaluation.
- Implementing no further action and continuing to monitor the student's academic, behavioral, and/or social progress.

### **Avoiding misidentification**

This Rtl process will help us avoid misidentification and over-referral of students for EC instruction. Parents can request a special education evaluation at any time, including instances when they disagree with the outcome of the IAT meeting. The school will respond to this request consistent with state and federal timeline requirements.

### **Evaluations and assessments**

The dean overseeing exceptional children will work to schedule a special education evaluation. The evaluation team will include various professionals consistent with the type of disability or disabilities suspected, such as teachers of general education, special education, and speech and language, as well as an occupational therapist, school social worker, and school psychologist/mental health provider. The team, with parents invited to be members, will meet to identify what evaluations are needed to diagnose disabilities defined by state and federal requirements. Parents may share new information, including evaluation/medical information from private providers. Parent notice and consent will be requested and



obtained before initiating special education testing. The IEP team, including the multidisciplinary team (or representative) and parent, is responsible for determining special education eligibility, identifying the student's needs, and developing an IEP to address the student's needs in accordance with applicable state and federal special education requirements.

The evaluation process is nondiscriminatory, and any written material will be in the family's native language. Tests must be validated, selected, and administered by certified or licensed personnel, consistent with the testing administration guidelines and in compliance with all state and federal requirements. Multiple measures will be used, and the evaluation will assess areas of educational need and all the child's special education and related service needs. Upon completion, the dean will schedule an IEP team meeting in consultation with the parent. The IEP team will review the results of the comprehensive evaluation and any additional relevant information provided by the parent and then determine eligibility for special education consistent with state and federal requirements (including rule-out factors). Following the determination of special education eligibility, the IEP team will develop an IEP for the student. This plan will be designed to address the student's unique needs and satisfy the requirements of a free appropriate public education (FAPE) provided in the least restrictive environment (LRE).

Placement will fall along a continuum of options with primary emphasis being placed on educating the student in the general education classroom to the greatest extent possible with implementation of needed supplemental aids/services, and/or supports.<sup>[1]</sup> Removal from the general education classroom will only take place when the nature and severity of the student's disability necessitates this removal. A continuum of placement options will be available to support student placement decisions, including consideration of placement in more restrictive settings operated by the local district or other external entity.

### **Child Find requirements**

High Point Prep will comply with obligations under the Child Find requirements of the Individuals with Disabilities Education Act (IDEA), including 34 CFR §300.125. We will appropriately notify parents consistent with state and federal requirements. We will also incorporate Child Find in marketing efforts within the community to attract the broadest possible spectrum of students, including students with special needs. Our strategy will aim to reach every family with a K-8 school-aged child within our geographic area via media, direct mail, and parent information meetings. By targeting broadly, we will attract students who reflect the entirety of the community we serve and ensure that students learn in an integrated environment.

We will hold meetings for families of EC students and our special education professionals to review our special education program at the school and encourage questions.

[1] This approach is supported by years of strong research on the effectiveness of inclusive education



practices, including a study by the National Center for Education Restructuring and Inclusion, 1995, research by Audette & Algozzine, 1997, and research by Lipsky, 1997; Sailor, 2003.

**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)**

Our principal will assign a dean to lead programming for exceptional children enrolled with High Point Prep. The assigned dean will schedule weekly one-on-one meetings with our special education staff to discuss student progress and the timing of annual reviews and three-year re-evaluations. This will include review of service logs to verify compliance with the student's IEP service time and progress-monitoring data. Progress reports will accompany report cards, and deans will discuss student progress relative to IEP annual goals at one-on-one meetings with teachers. General education teachers will keep a record of the IEP or Section 504 accommodations and modifications that are to be made in the general education setting. Special education teachers will provide a copy of an "IEP-at-a-glance" to general education teachers to allow for collaboration on student goals and objectives in the grade-level curriculum.

NHA special education supervisors and school professionals will annually evaluate special education at High Point Prep, focusing on Child Find activities, educational outcomes, IEP implementation, parent involvement, compliance, and behavior. A review of data for each of these areas will be conducted. A continuous improvement plan (CIP) will be developed for any areas not yet "met." The special education dean and the NHA special education supervisor will monitor progress toward the goals outlined in the CIP and adjust as necessary.

*Record request, confidentiality, and compliance:* School staff will request records from the student's previous school or district. If complete records are not received within 14 days from notification that the student is an exceptional child, staff will reach out to the prior school. If the requested information is not obtained, our school will initiate the EC referral or re-evaluation process. Staff will collect, handle, and secure the records at High Point Prep and share these documents with parents in accordance with all relevant state and federal laws and regulations.

**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.**



High Point Preparatory Academy will offer the appropriate services, as well as specially designed instruction for students with Individualized Education Programs (IEPs) and 504 plans. This will allow access to, and provide progress in, our general education curriculum. High Point Prep will serve each student according to their individual academic, functional, and social and emotional needs, providing a free and appropriate public education (FAPE) in the least restrictive environment (LRE) in accordance with state and federal requirements. We anticipate serving students with mild, moderate, and severe disabilities and will assign a dean to oversee all EC programming.

Educating exceptional children requires both individualization of the educational programs and services and maximizing inclusion in the general education setting. Our service delivery model may include co-teaching, consultant teacher support, and/or support provided through resource room services. We recognize that the least restrictive environment for some students with special needs may require more extensive supports, including placement in programs operated by the local district or some other setting.

The focus of instruction will be on IEP goals and objectives and grade-level content expectations with scaffolding of instruction from the student's instructional level to grade-level expectations. Emphasis will be placed on accelerating learning outcomes through delivery of research- and evidence-based practices and resources with the goal of closing the instructional gap toward grade-level proficiency. Screening and assessment data will be used to determine student instructional levels and needs. Whenever appropriate, grade-level instructional materials will be used with needed accommodations and supports. For students significantly below grade level and/or missing foundational reading and/or math skills, we will use a direct instruction approach and supporting resources.

If a student consistently does not make progress on IEP goals and objectives, the teacher will inform the dean, who will then schedule an IEP team meeting and/or an additional evaluation. The school will conduct a functional behavioral assessment (FBA) when a student's behavior negatively impacts his/her academic and/or social/emotional performance within the school setting. Based on this data, the IEP team will consider the need for positive behavior support or a behavior intervention plan (BIP). Emphasis within this plan will be placed on identifying the function of the target behaviors, teaching desired replacement behaviors, implementing strategies designed to prevent behavioral escalations, and providing a sequence of strategies and procedures that can de-escalate behavior. A core team of building staff will be trained in non-violent crisis prevention intervention (CPI) techniques to support crisis situations with emphasis placed on verbal de-escalation and the use of intervention procedures designed to keep the student and staff safe. Behavioral incidents resulting in the need to utilize CPI-approved physical intervention techniques will result in immediate parental contact with a written summary provided to the parent within 24 hours of the incident. This documentation will also be maintained on file at the school.

**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?**

Students who require specially designed instruction will either have services delivered in a general education classroom through a co-teaching and/or consultant teacher service delivery model and/or through delivery of services within a resource room as determined by the IEP team based upon the unique needs of the student. High Point Prep's IEP team will consider the requirement that services be provided within the least restrictive environment. Priority will be given to programming within a general education classroom. Our school will prioritize collaboration among general education and special education teachers. Both general education and special education staff will receive professional development aimed at effective teaching practices.

Instruction that is provided to a student outside of a general education classroom will only take place when the severity and nature of a student's disability requires such a model. A continuum of services and placement options will be available to support student placement decisions, if necessary. This includes consideration of placement in more restrictive settings operated by the local district or other external entity. Related/ancillary services (speech, mental health, physical, and occupational therapy) will be provided and scheduled consistent with the student's IEP. These services will be provided by properly certified and licensed practitioners who will be employed or contracted by NHA or provided by the local school district or other affiliated agency.

**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).**

We will serve all children according to their individual academic, functional, and social and emotional needs, providing a free and appropriate public education (FAPE) in the least restrictive environment (LRE) in accordance with state and federal requirements. High Point Preparatory Academy will assign a dean to oversee the programming for students with special needs.

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



Data will be routinely collected to monitor student progress on IEP goals and objectives and to support instructional decisions. The school also will ensure that parents of children with disabilities are informed of how their child is progressing on annual IEP goals and in the general curriculum at least as often as parents of general education children.

*IEP monitoring:* If the student is not making progress on IEP goals/objectives, the school will schedule an IEP team meeting, including parents. The IEP team will review and revise the IEP as needed and consider additional supports, services, placement options, and any other identified needs. If the child's needs extend beyond the capacity of the school setting, the school will work with the parent to explore additional educational options.

High Point Prep will administer a norm-referenced assessment multiple times each year to identify baseline skills and to assess growth targets. Staff will routinely implement curriculum-based and progress-monitoring assessments. Assessment data obtained will be used to monitor and adjust instructional practices based on the student's response to instruction. Special education providers will also use this assessment data to monitor student progress on IEP goals/objectives and for reporting purposes (e.g., report cards, parent-teacher meetings, IEP team meetings). Monthly data walks will be conducted during special education team meetings to review progress. Special education providers will also use curriculum-based assessments and other progress-monitoring data collection tools to monitor progress on IEP goals and objectives.

*IEP reporting:* Parent partnership is a cornerstone value of High Point Prep and will begin the day a student enrolls in the school. Parent involvement is an integral and ongoing part of the special education evaluation, eligibility, and IEP processes. Parents will be invited to join parent-teacher conferences, will receive IEP progress reports, and will be invited to review behavior issues and develop positive behavior support plans (usually linked to the IEP process). Special education procedural safeguards will be provided to the student's parent or guardian.

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



High Point Preparatory Academy will hire certified teachers, in accordance with law, to make sure high-quality instruction is provided for students with special needs. We will review staff credentials to ensure we remain in compliance with the certified teacher requirements. Related service staff will maintain state-required credentials ahead of providing services to eligible students.

Staff new to High Point Prep, including EC teachers and support or itinerant staff, will take part in a new staff orientation session ahead of the school year. They will do so to learn our school's mission and special education practices and procedures. The special education staff will take part in additional training during professional development days, special education staff meetings, at regional and state conferences, and during weekly one-on-one meetings with the dean overseeing special education.

Our staff will include three EC teachers and two EC paraprofessionals during our first school year supporting our students with IEPs. Additional staff will be hired in the event our enrollment of students with special needs surpasses our forecast. Based on the needs of our students beyond enrollment, High Point Prep will maintain ancillary staff, including a social worker, speech therapist, occupational therapist, physical therapist, and mental health provider, either on staff or through a contract. Additional special education staff will be added depending on student need, consistent with state or local district caseload requirements.

#### 9.4. Student Performance Standards

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



## Goals

As with other NHA-partner schools, we will use measures of academic growth and proficiency beyond those required by state law, and our school will share similar goals with other NHA-partner schools in North Carolina and elsewhere. Our academic goals look at proficiency, comparisons against Guilford County Schools, course completion, and growth.

As required, we also will administer a national assessment of college readiness to every eighth-grade student and will use the results to develop a plan for each student's success in high school and college. As noted above, one of the reasons we chose to partner with NHA was the track record of success in ensuring that students are high school- and college-ready.

We expect our school to achieve operational goals established for NHA-partner schools, too. Our operational goals will measure attendance, parent satisfaction, the fiscal state of High Point Prep, and the performance of NHA.

Our academic goals will include comparisons to neighboring district schools and state and national averages. Our goals are specific, measurable, ambitious, attainable, relevant to our mission, and time-specific. Each goal focuses on a specific assessment and assessment period, and each is designed to encourage consistent improvement and achievement in student learning.

**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.**



High Point Preparatory Academy will regularly assess the efficacy of teaching and the quality of learning by utilizing an array of assessments that measure the progress of all students who enroll with us. NHA will work with staff to ensure these measures are offering sufficient alignment.

### **Use of assessment data**

Our school will administer frequent, varied assessments throughout the year to ensure that students make appropriate progress pursuing mastery of state standards. We collect and analyze results from assessments that are closely aligned with standards, so we can understand the efficacy of our curriculum and instructional methods and adjust instruction, often in real time, if needed. Our assessments will range from simple exit tickets to interim assessments and, of course, state assessments; each of them offers valuable and actionable insights on our curriculum and instruction. This will include ongoing formative assessments, NHA's common assessments, state assessments, and internally created assessments.

Our key assessments will include:

- *Formative assessments:* High Point Prep will administer formative assessments to provide important benchmark data on student growth.
- *Interim assessments:* We will administer interim assessments two or three times per year to give deans and teachers long-term snapshots of students' learning and preparation for end-of-year state assessments.
- *Unit tests:* Teachers will administer unit tests in specific subjects after completing instruction in that area of learning. Students who score poorly will be re-taught and re-tested.
- *Quizzes:* Teachers will challenge students with quizzes at the end of each week to take a quick snapshot of student learning covered that week. Data from these quizzes, which are also closely aligned with state standards, are analyzed in real time so teachers know whether and how they must modify instruction. In fact, at NHA-partner schools, it is common for instructional professionals to modify teaching plans within a day of receiving quiz results. These modifications may include the re-teaching of material the next school day, changing workshop groupings of students so students who struggled have a second chance to learn the material, and more.
- *College readiness exam:* As required by the NCDPI, a high school- and college-readiness exam will be administered to all 8th-graders with two primary purposes: 1) to provide students with feedback on competency strengths and gaps relative to students' career aspirations; and, 2) to offer insights into students' academic readiness for college.
- *Exit tickets:* On any day, teachers may give an exit-ticket assessment based on the standard that was the focus of that day's lessons. Because our instructional plans are driven precisely by standards, a simple roomful of thumbs up or down will offer teachers valuable, aligned, and actionable feedback.

### **Common assessments**

NHA has developed common assessments in both English language arts and mathematics. Common assessments align closely with instructional objectives, are easy to administer, provide automated scoring,



document student progress, and show when new support is needed to ensure appropriate progress. Curriculum-based and interim assessments provide common data to show student progress.

### **Assessment professional development**

As part of our commitment to data-driven instruction, we will prioritize professional development designed to help teachers improve their skills analyzing data for insights and applying those insights to instructional planning and delivery.

Our school leaders and teachers will collaborate during grade-level or departmental planning time to analyze assessment data. This analysis will seek to help them identify, understand, and address learning gaps, set improvement goals, and clarify needs. These efforts will focus on individual students, on entire grade levels, and on the entire school.

### **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.**

As noted in Question 121, our principal will be authorized to make initial grade placement of students and will have the final decision with regard to promotion, acceleration, and retention of students. A student is expected to progress through one grade each year. On occasion, it may be in a student's best interest to accelerate him or her more than one grade or retain him or her to repeat a current grade. These criteria will be shared with families in our parent and student handbook.

If a student fails to meet the third-grade requirements of the NC Read to Achieve mandate, additional interventions and a personalized reading improvement and monitoring plan will be offered. If not proficient after these interventions, the student will be retained unless they meet a good cause exemption. Retained students will receive additional intervention support. Any decision to retain an exceptional child will be determined by the principal, in consultation with the IEP team. EC students may not be retained based solely on their exceptionality, but retention may account for factors such as a student's ability to fit in socially and emotionally with their present grade level.

### **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.**



Students will exit our school in accordance with the North Carolina Student Accountability Standards. Consistent with our mission, we believe strongly that students should leave our school prepared for high school and college – both socially and academically. The practice of promoting students who have failed to master part of their grade-level curriculum is incompatible with the state's gateway standards, the academic goals of our school, and our mission. Our Board is committed to meeting the needs of students who are at-risk academically. Our model will have a robust formative assessment program to quickly identify students who need extra attention, as well as those who are surpassing grade-level standards, all deserving differentiated instruction. We will use those tools to ensure that at-risk students receive the appropriate supports and are exited from our school successfully.

## 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 development.

In alignment with our school leaders and NHA, our Board will build a climate and culture for High Point Prep that corresponds with our mission. Our belief is student learning is a shared adult responsibility. We will ensure High Point Prep aims and achieves high standards regarding academics, discipline, and embodying what it takes to be successful citizens.

Time spend on disciplining students is time not invested in student learning. Our philosophy behind our discipline policy is to build and foster a culture committing to individual student achievement. We will enact, implement, and sustain a program called Behave with Care (in place at other NHA-partner schools and outlined below in Question 152). Teachers and school staff will reinforce positive behavior through relationship building, classroom motivation systems, development of social contracts, precise praise of positive behavior, and individual student affirmations.

Through this program, we will promote academic achievement while developing our students to be successful citizens with many opportunities for their lives, including college and careers.

### 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.



High Point Prep will be available for all students and we will welcome them whenever they choose to enroll so long as a seat is available. Our school will host numerous meetings before the beginning of school in order to start building the desired culture for families and the community. We intend to advertise broadly and share our mission and vision. We understand student learning to be a shared adult responsibility. In turn, we plan to begin our school culture with our school leaders and school staff. We plan to hire a principal who believe all children can learn at a high level and who will drive this across our school community. High Point Prep staff will invest time as a team in professional development prior to the start of school in order to learn systems, processes, and foster culture.

Any students that enroll at our school mid-year will be welcomed and we hope to maintain a strong wait list to fill any available vacancies. New families will have an orientation meeting prior to enrollment and will be assigned a partner student, and family, if available, to model our school culture and answer any questions that arise.

**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.**



We believe that time spent on student discipline is time that would otherwise be spent on student learning. Our philosophy regarding our discipline policy is to build and sustain a community that commits to individual student achievement. Our Board will enact and implement a values system known as Behave with Care. Behave with Care includes schoolwide behavior and classroom management practices. It is rooted in the concept of relationships and engagement, and it is aligned with the U.S. Department of Education's Positive Behavioral Interventions and Support model. The Behave with Care system entails a six-level color-coded, schoolwide behavior management system to enforce positive behaviors. Our teachers and staff members will consistently reinforce positive behavior through relationship building, classroom motivation systems, adherence to social contracts, precise praise of positive behavior, and various forms of student affirmation.

Teachers will have access to Positive Behavior Replacement Plan tools that align with Behave with Care. Activities involved help students to understand consequences of behaviors, why certain behaviors are unacceptable, and how students can proceed differently in the future. NHA's moral focus curriculum is designed to assist in fostering an environment conducive to both teaching and learning, and it helps students learn to manage behavior and be strong members of a community.

Our program will be equitably applied to the entire student population enrolled with High Point Prep. We will make sure it is applied equitably, but will also remain mindful of individual student needs. The system clearly defines examples of behaviors at each level and appropriate consequences, and details of incidents will be recorded in our student information system to ensure all behavior incidents are noted and treated consistently. Additionally, these records are made available to parents. Teacher observations and feedback ensure consistency from student to student and from classroom to classroom, which in turn will create a common set of expectations for behavior among all students and adults.

*Professional development:* We will provide training designed to assist school leaders and staff in creating positive, productive, and trusting relationships with students who enroll with High Point Prep. This includes development on Behave with Care ahead of the school year, as well as ongoing support during the year in the form of ongoing professional development, virtual learning, virtual classroom instruction, observation with feedback and coaching, and video modeling. Teachers will learn strategies to establish safe and orderly classrooms, reinforce positive behaviors, address problem behaviors, and encourage students to take responsibility for their actions.

*Offenses; application to exceptional children; due process:* Our parent and student handbook will include information on major aspects of the student discipline policy, including offenses eligible for disciplinary action. We will follow federal and state laws as well as NCDPI policies to ensure that due process and grievance procedures are followed whenever suspending or expelling students with disabilities or suspected disabilities is considered. These processes will be further detailed in an EC handbook provided to staff at all NHA-partner schools.



## 9.6. Certify

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

- Yes
- No

Q154. Explanation (optional):

Our Board has had the opportunity to review and consider this proposal. We also voted to submit the application as written. Our Board acknowledges many components could be similar to other NHA-partner schools with regard to operations. As such, significant portions of this proposal are similar to others submitted in previous years.



## 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.

3415 Langdale Dr., High Point, NC 27265.

### 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 the ...

#### Applicant Evidence :


High Point Preparator...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

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



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overseeing the charter school. Include how the board will recruit, hire, and supervise the lead administrator.



There are currently five members of the High Point Preparatory Academy founding Board. We may choose to revisit this structure and/or choose to add individuals to have seven total members.

Our role will be one of governance, closely ensuring our school is on track towards meeting the goals within our charter contract. This will involve reviewing academic, operational, and financial data for our school and directing change appropriately. We will delegate to NHA the daily operations for High Point Prep, confident in its ability to deliver the educational program we propose within this application.

### **Roles and duties**

Our Board will ensure the school is on track to achieve its goals, mission, and vision. Through our partnership with NHA, we will make certain the school has in place the resources and support necessary to build a community where students achieve at their highest potential. Our decisions will be made in the best interest of our student population and in compliance with the school's charter, state and federal requirements, and the financial stability of High Point Prep. We have engaged independent legal counsel, as well as an independent auditor. These resources will provide us with guidance regarding legal decisions and the state of our school's finances. Intermittently, we may contract with a third-party for an evaluation of the performance of NHA.

Our Board is ultimately responsible for the success of High Point Prep, and as such will hold NHA accountable for delivering the programming we desire. NHA's longstanding success provide us with confidence in achieving our mission and goals. We will partner to meet the needs of families who entrust us with their students. Our Board will enact policies that provide necessary transparency into our governance, NHA, and High Point Prep.

The High Point Prep Board will undertake actions including (but not limited to): articulating, maintaining, and driving our mission throughout the school community; holding NHA accountable for the efficient and effective operation of the school and for the achievement of academic goals; reviewing and approving the school's annual budgets and ensuring that proper financial procedures are in place and effectively implemented; reviewing, approving, and monitoring progress toward academic, financial, and operational goals; reviewing and approving school policies; ensuring that sufficient enrichment programs are created to supplement the education program; appointing officers and committees as needed; adopting, amending, and repealing bylaws as needed; developing and maintaining effective relations with NCDPI and the Office of Charter Schools; and ensuring that meetings are conducted in accordance with open meetings laws and in compliance with North Carolina conflict of interest and public records laws. Our school leaders will share with us information necessary to understand every component of how our school is achieving.

### **Hiring lead administrators (Principal)**

Under our partnership arrangement, teachers will be jointly employed by our Board and NHA and school



leaders and other non-teaching staff will be employed directly by NHA. NHA has an experienced and expert school leadership recruitment team that identifies and evaluates school leaders for their skills, experience, and personal attributes. Thus, while our principal will report as an employee directly to NHA, the principal will be responsible for regularly reporting about the school to the Board and the Board will hold our principal accountable, along with NHA, for the school's performance.

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

Our Board currently has five members. As we proceed in governing, we may alter our composition to add additional individuals to our membership.

We will be the governing Board of High Point Prep. We will be tasked with making certain our school is on the path to achieve our goals, vision, and mission included within our charter contract. Our board will focus on overseeing the operational, financial, and academic components of our school. We will hold NHA accountable and direct change appropriately. Our partnership with NHA stipulates that we will delegate the daily operations of our school to NHA. We are confident in the organization's ability to provide us the desired educational program outlined within our proposal.

**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 of High Point Preparatory Academy was assembled by Dr. Kellie Jackson at the end of 2020. Our Board intended to apply for a new charter school during the 2021 application cycle. Unfortunately, we did not secure the necessary steps to submit an application. For the proposal during the 2022 application cycle, our Board approached NHA to partner with us to ensure we have the tools necessary to be successful.

As a member of the High Point Citizens Advisory Council, Dr. Jackson was invited to participate in Project Board Development (PBD). Project Board Development is a leadership development program designed to identify, recruit, and train candidates for referral to serve on school PTAs, committees, governing boards and other leadership roles within the United Way of Greater High Point, its partner agencies, and other health and human services nonprofit organizations. PBD educates trainees on the roles of a board member and then links them to agencies requesting members with new skills and leadership abilities. Dr. Jackson has recruited our membership, assembling individuals with a passion for this area, and skills and experiences that include education, school administration, community engagement, real estate, and business. In these capacities, we have a strong understanding of the needs of families in Guilford County. The High Point Prep Board will be responsible for ensuring our school thrives academically, operationally, and financially. We will partner with NHA to deliver in these areas, and will hold them accountable to do so.

**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.**



Many of our Board members have strong roots in the High Point area. We prioritize the success of our community and all our community members. In our spare time, we each maintain a passion for giving back to and growing our community through volunteer opportunities. Our Board does so through involvement with our government, local organizational efforts, and other endeavors focused on the success of High Point.

The High Point Prep Board's volunteer efforts afford its members a strong understanding of what our community needs and how we can attempt to offer opportunities. Our backgrounds are rooted in business, education, government, finance, community services, and importantly – as parents. We are confident these traits and experiences have positioned us well; ensuring we will be prepared to analyze and act upon the operational, academic, and financial aspects of our school. Further, the strong relationships we maintain across the area will give us expanded perspective on what will help us continue on the path to achieving our vision and mission.

*Meeting educational and operational success:* Governance will be the focus of the High Point Prep Board. To meet our goal of achieving the mission of High Point Prep, we must perform fiscally, academically, and operationally. We will continue the necessary steps and training to ensure we thrive by adopting the appropriate policies, implementing our school's educational program, meeting our goals, and ensuring High Point Prep operates in a way that fosters success. This Board has already begun and understands the importance of completing ongoing training to meet our school's mission. Our Board will hold itself accountable to continuously grow in our skills to ensure High Point Prep is successful.

*Evaluation of the school and the school leaders (principal):* Our principal will attend our meetings and provide ongoing updates. These updates will include operational data, student performance, assessment data, and parent survey data, when available. The review of this information will be a standing item on the agenda at each of our Board meetings. We will use this information to analyze High Point Prep's progress towards our performance goals and performance of the principal. Under the provisions of our services agreement with NHA, we maintain the authority to express reasonable dissatisfaction with the principal. Additionally, our contract with NHA allows us to terminate the entire partnership at any time if we decide that is in the best interest of the school. Should we opt to terminate the agreement with NHA (which no board has ever done in the 27-year history of the organization), we retain the right to lease the school building for the remainder of the current school year, as well as for one additional school year. Importantly, the per-pupil funding will continue to flow to us to fund school operations independently. This allows us to transition management to another company or to become more of an operational board and contract for the individual services we need.

*Involvement of key stakeholders:* Our meetings will be open to the public. We invite parents to participate in our meetings. We will seek feedback from parents, in addition to community organizations, recognizing that they are critical to the success of our school. We will welcome any community partner with meaningful



feedback to share with our Board. Our intention is to maintain a membership on our Board where each individual is passionate about the success of our students.

**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?**

Our Board chair, Dr. Kellie Jackson assembled the Board for High Point Preparatory Academy in 2020. She was born and raised in High Point and attended Guilford County Schools prior to the merger of Guilford County Schools, High Point City Schools, and Greensboro City Schools. Dr. Jackson has both academic qualifications and experience to oversee a charter school that can favorably compete with local schools. She has conducted extensive research regarding the necessity of a public charter school in High Point. Her experience in education and community service allows her insight in recruiting the best possible candidates to open a high-quality new school in Guilford County. She reached out to community members who share her belief in school choice and who have a passion for meeting the needs of families in our community in forming the founding Board of High Point Prep.

We will ask Board members to notify the chair as early as possible if they do not wish to continue to serve on the High Point Prep Board for an additional term. Our board will actively seek contacts who have expressed interest in serving on the High Point Prep Board. This will ensure we will have a full Board at all times, and can quickly fill any vacancies that may arise.

Appointments to the Board to complete the terms of vacant seats will be made in accordance with our bylaws, and we will strive to ensure that an appropriate breadth of skills and experiences are represented by our membership, particularly in the areas of governance experience, education, and financial management.

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



Our Board has strong ties to the local community and greater Guilford County. Members of our Board spend time volunteering for local non-profit organizations, universities, and local government. Dr. Jackson serves on the High Point Citizens Advisory Council. Ms. Gloria Jackson owns and operates the Triad Child Development Center and has experience serving on boards for local Big Brother Big Sisters and the YWCA. Mr. McNeil is a retired teacher and administrator, and has served on a number of local boards including the charter school board of Phoenix Academy. Mr. Price has been a real estate broker in the High Point area for over 45 years and spends his time serving on local church, non-profit, county government boards, and previously served on the Guilford County Board of Education. Dr. Walker has worked with Guilford County School as an exceptional children's teacher for a number of years.

Each of our Board members has unique experiences. Our backgrounds will help our school develop with various perspectives to better the community we plan to serve. This includes understanding growing areas in our community and the expected populations in those areas. By understanding the population we will serve, we can better meet the needs of our student population from the day they enroll with us.

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

Our Board has planned for monthly meetings. Before our school opens, we may meet on a more frequent schedule to ensure High Point Preparatory Academy is prepared to accept students on our first day of school. This may require additional meetings.

**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.**



Our Board members will benefit from training and development opportunities from multiple sources. Our Board has begun training, hearing a presentation from our legal counsel on best practices of nonprofit boards. This presentation included information on board members duties and meeting procedures. Similar opportunities will be available to new Board members, and will continue for existing Board members. We will utilize Board funds to take advantage of training opportunities, and this may include attendance at the National Charter Schools Conference, NHA's annual Board symposiums, and the annual conference and opportunities offered by the North Carolina Coalition of Charter Schools.

Further, our Board will have access to a detailed suite of online learning modules maintained by NHA. These training assets help Board members understand a wide range of topics, including: roles and responsibilities; procedures; authorizer roles and responsibilities; the services and lease agreements; bylaws; executive sessions; public comment at meetings; and academic, operational, and financial data. Additionally, we will seek support and advice on governance training from national and local sources, our own legal counsel, and our own professional resources.

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

The Board of High Point Prep will make considerations and take actions that are rooted in ethical and moral guidance. One of the reasons we have partnered with NHA is the organization's commitment to delivering a successful school to us that is based upon these same cornerstones.

We have approved bylaws that require each governing Board member to make known any actual and/or apparent conflicts of interest that may intersect with considerations and actions taken by our Board. We maintain independent legal counsel who will offer advice in the event one of the instances presents itself. Examples of conflicts of interest may include transactions where a member could gain a material financial interest and is also closely involved of a separate entity of party (director, trustee, officer, general partner, etc.). Transactions may then be voted upon by a majority of the Board who do not have involvement in a third party with the potential to gain financially. Also, as noted throughout our proposal, our Board members have completed background checks to identify any outstanding matters.

*Existing conflicts of interest:* Our Board does not have any existing conflicts of interest.

*Avoiding actual and perceived conflicts:* Our bylaws require members to inform the Board of any/all direct or indirect conflicts of interest regarding any/all transactions that come before us. If any perceived conflict of interest were to arise, we would seek the advice of our independent legal counsel.



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

It is our Board's intention to assume the role of governance, maintaining the ultimate authority for High Point Prep's policies with regard to academics and finances. It is crucial for our Board to consider vital questions, including:

- Are we in compliance with our school's charter?
- How well are our students learning and achieving?
- How well are we performing financially?
- Are parents involved in the school at an appropriate level?

We intend to use these questions as a guide in assisting our Board to establish school policies. Through our partnership with NHA, we will have access to existing school policies that have proven successful at schools in operation in North Carolina. These policies are aligned to state- and charter-specific requirements. They have been implemented, amended, and revised by governing boards and their respective legal counsels. NHA's policies have previously met the requirements of North Carolina's Ready-to-Open process and allow us a guide and barometer as we design of our own. We will review, discuss, and modify as necessary once our charter is approved, and our policies will be shared at one of our Board's public meetings.

Our Board will adopt our policies in alignment with our mission and vision for High Point Prep. We will oversee them for compliance with applicable laws. At a minimum, we will annually review our policies with our independent legal counsel, and will take action on any required changes.

**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.**



At this time, our Board has not planned to form advisory committees, councils, bodies, etc. that would aim to help us make decisions that pertain to High Point Prep. However, this does not prevent us from exploring the possibility in the future of doing so. We intend to be a dynamic Board that forecasts and responds to the needs of our students and families. This will allow us to potentially create committees related to specific subject areas that can offer insight to our Board.

It is our obligation as the governing Board of High Point Prep to hold accountable NHA to deliver us a successful school. The definition of our relationship between the High Point Prep Board, NHA, High Point Prep's school leaders, teachers, and staff are ordered within an organizational chart (see Appendix G). High Point Prep's principal directs grade-level deans (who in turn oversee grade-level teachers). The principal also leads administrative tasks of High Point Prep (we have budgeted for a registrar who will carry out these tasks).

Together with NHA, our Board will employ teachers jointly (in accordance with North Carolina statute and deemed acceptable by the Office of Charter Schools and the State Board of Education). However, it is our Board who will maintain the power to hire and (if necessary) terminate teachers, in accordance with state law.

Parental partnerships is one of the four foundational pillars of NHA and High Point Prep. In turn, we intend to help cultivate and foster a parent organization for the school. We hope this group will assist the school's efforts to achieve its vision and mission. Our Board's successful formation as an organizational body will assist the parent group to maintain strong policies, procedures, and other key facets to comply with all requirements. Our Board will request ongoing updates from the parent organization to share how they are supporting the school.

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



## Parent grievances

High Point Prep will maintain an open environment for our parents. We will make all reasonable attempts to appropriately address and respond to concerns shared with us by parents. Our school's teachers will be the initial points of contact for communicating with parents/guardians to address concerns. Teachers will answer inquiries promptly, respectfully, and aligned with established guidelines for handling parent grievances. Should parents/guardians be dissatisfied with the response from classroom teachers (or if teachers are not involved in the nature of the complaint), they may contact a member of the High Point Prep leadership team (deans/principal) to schedule a meeting to discuss the matter.

In the rare instance that speaking directly with teachers or school leadership does not lead to resolution of a concern, parents/guardians may then bring the concern to NHA's parent relations department. This team is dedicated specifically to assisting families to work with school leaders to address concerns and resolve issues. Parents will have several ways to report a concern, including: calling the department using a toll-free number, which is provided in the parent and student handbook and made available from the school's main office; reporting concerns using the "Contact Us" page of the NHA website; or by emailing NHA at its general contact email address (also listed in the handbook and available in the school's main office).

If these efforts do not resolve the issue, concerns may be brought to our Board. Parents may also contact the Board directly if they have concerns relating to a board policy or decision, if there is a suspected violation of laws or the terms of the charter, or if parents have concerns about the school management or operations. Concerns brought to the Board may be presented verbally or in writing and will be addressed at or before the next public meeting.

## Employee grievances

High Point Prep will implement a process to assist staff in resolving concerns or grievances. Our school's deans will be teachers' initial line of outreach to address concerns (concerns about deans shall be addressed to the principal). Staff are also able to contact a team member at NHA's Service Center. Employees also may use an employee hotline that lets them provide feedback anonymously, and such concerns are immediately escalated to the NHA Service Center for review, investigation, and resolution. In the rare event that staff cannot resolve a concern by speaking directly with school leaders, by communicating with an NHA representative, or by communicating through the hotline, staff may bring an unresolved concern to our Board.

High Point Prep's working environment allows school leadership to make decisions sensitive to the demands of students. We will structure staff, and also restructure, based on skill and performance to best meet student needs. Employees serve on an at-will basis, and teachers are to be employed jointly by our Board and NHA. It is our belief that school leaders should have the ability to identify/support and terminate ineffective staff, as necessary. Policies and procedures will be defined and put in place to handle



unacceptable performance by teachers or school leaders, and in the event that performance is unacceptable and depending on the particular circumstances, discipline may occur. Discipline may include a warning, creation of a performance coaching plan or performance improvement plan, suspension, or administrative leave. Employees will receive additional coaching when necessary because we want all employees to grow and succeed. If a teacher does not meet performance expectations or if there is a significant violation of policies or procedures, however, termination of employment may be recommended to the Board.

**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 :**


Appendix G - Organiza...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

**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

**Resources**


Charter School Board ...



Applicant Evidence :



Appendix H - Charter S...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

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



Charter School Board ...

Applicant Evidence :



Appendix I - Board Me...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

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 :



Appendix J - Proposed ...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

**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

Applicant Evidence :



Appendix K - Articles o...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

### 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



Staffing Chart Templat...



Applicant Evidence :



High Point Preparator...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

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



Our school will prioritize recruiting and retaining high-performing teaching staff to deliver sound instruction to the students who will enroll with High Point Prep. Through our partnership with NHA, we will implement the organization's more than 25 years of experience and expertise with talent acquisition.

### **Recruiting**

NHA has a longstanding record of success in recruiting and hiring strong talent. High Point Prep will benefit from the extensive candidate network and capabilities of our partner. NHA currently works to staff 99 partner schools across nine different states. Its team of hiring professionals will work with our Board to leverage local knowledge and connections for an even greater level of support. NHA's recruiting strategies include the following:

- *Traditional:* NHA employs traditional and digital marketing strategies to search for and screen potential staff. This includes job and university career fairs, social media, advertising, and referrals. Our outreach will span local markets, online, and across the NHA network.
- *Campus relationships:* NHA has established relationships and partnerships with colleges and universities across North Carolina. These connections will help our school create pipelines for teacher candidates, allowing our school early opportunities to network with high-performing student teachers and graduates.
- *Career fairs and conferences:* Our partnership with NHA will include having recruiters present at career fairs and events locally, regionally, and nationally. This provides us with an additional opportunity to meet new graduates and teachers in transition who may be high-performing staff at High Point Prep.
- *Referral networks:* Referrals are often the best way to hire known high-performing staff. We anticipate receiving referrals for new teachers from across the 15 NHA-partner schools in North Carolina, as well as from the other partner schools nationwide.

NHA's team dedicated to recruitment and hiring studies current trends regarding supply and demand for teaching staff. Further, it has invested time and resources to understand this in Guilford County in anticipation of understanding existing and potential hiring needs.

### **Retaining**

NHA's organizational design has put in place the necessary systems and procedures to prepare, develop, motivate, engage, reward, and ultimately retain school staff. Our school will implement a "Total Rewards" compensation model to provide staff with both a desirable benefits package and chance for merit-based salary increases (for those who have a high impact on student learning/achievement). Included within our proposed budget is teacher pay above market for openings that can be hard to fill (ex: EC and EL teachers). Our health plan offerings are competitive, with low employee-cost options, retirement choices (including an employer-match), life insurance, tuition reimbursement, and employee acknowledgement and reward programs.



**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.**

The founding principal of High Point Preparatory Academy has not yet been identified. We intend to seek a candidate who embraces and believes in the mission and vision in place for our school. This will be the foundation upon which we partner with the school's principal to establish our desired climate and culture.

High Point Prep's principal will hold a strong commitment to the achievement of our school's mission. This individual must hold the steadfast belief that all children can and will learn at a high level. Qualified applicants will have a record of achieving significant student performance growth. Strong leadership and management skills and the ability to provide instructional support to teachers is required. The principal must be committed to and capable of developing school culture, promoting student achievement, and implementing school operations. Among the numerous responsibilities are:

- Demonstrating and modeling all aspects of the school-wide framework;
- Evaluating the educational program for conformance to state, federal, Board, and NHA standards;
- Collaborating with our Board on hiring and evaluating teachers;
- Implementing tools for parent and community communication;
- Reporting school activities and academic achievement to our Board regularly;
- Establishing school procedures and systems; and (but not limited to),
- Monitoring the use of data in lesson planning and evaluating student academic growth.

Principal candidates will have a bachelor's degree (master's degree preferred) and three or more year's related experience and/or training or equivalent combination of education and experience. They will demonstrate exceptional language skills, mathematical skills, reasoning ability, and interpersonal skills and possess all administrative licensure as required by law.

**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 :**

We have not identified a school leader. However, we are uploading here Appendix O - Additional Appendices Provided by Applicant.



**Applicant Evidence :**



Appendix O - Addition...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

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

The services agreement in place with NHA clearly defines the relationship between school employees and NHA (Article VIII of the agreement, included as Appendix A4.1). High Point Preparatory Academy's teaching staff will be jointly employed by both our Board and NHA. School leadership (principal and deans) will be solely employed by NHA. Our Board's independent legal counsel has reviewed and offered feedback on this arrangement, and has determined it to be beneficial for our students. We will work closely with NHA to make sure our school has the best possible staff to achieve High Point Prep's goals, mission, and vision.

Through our services agreement with NHA, our partner is responsible to attract, recruit, screen, and hire successful teaching candidates and recommend them to our principal and Board for review and ultimately employment. Our Board will maintain the authority to disagree with our principal, and we will allow NHA and the principal sufficient time and support to resolve any named issues. Our Board also retains the authority to direct NHA to terminate the principal if we do not realize results of these efforts.

NHA's comprehensive benefits package, competitive salary structure, and quality retirement plan will serve to attract excellent educators. Additionally, our school will benefit from NHA's substantial and professional teacher recruitment efforts and its 99-school network to find the right staff for our school. Our Board will plan to visit other NHA-partner schools in the area, and potentially spend time speaking with Board members of those schools.

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



Our school plans to implement a background check policy for High Point Prep. In partnership with NHA, our school will be an equal opportunity employer. We will leverage NHA's expertise in managing the licensure and compliance functions for our school.

As noted, our teachers will be jointly employed both by our Board and our partner, NHA. The hiring process to be utilized includes practices that require NHA and High Point Prep's principal to recommend teaching candidates to the Board. Our Board and NHA will work in tandem to select personnel for the leadership of our school.

*Dismissing personnel:* Staff members at High Point Prep will serve on an at-will basis. Our school's climate and culture will allow school leaders to make decisions in the best interest of our students. This includes identifying ineffective staff, offering additional structures and support, or termination of employment.

Should employee performance not be acceptable, and depending on circumstance of an incident(s), appropriate disciplinary measures may be taken. This can include: warnings, coaching/performance improvement plans, suspension, and administrative leave. If these interventions and supports do not yield increased employee performance, or if a substantial violation of policies/procedures takes place, termination is an option. Our Board will receive all recommendations for termination of a teacher and we will consider and act accordingly. We will provide details on corrective actions and termination processes within our employee handbook. This handbook will be given to all employees on or before the first day of employment.

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



Our budget included with this proposal offers detail on proposed salary information for school staff members.

Guidelines will be implemented for teacher compensation to differentiate pay in accordance with market rates and performance. Initial salaries will align with the weighted averages of the school districts nearest High Point Prep. This ensures that base compensation is competitive. Salaries will mirror the local market for the first three years of employment, with merit increases beginning in a teacher's fourth year with our school. Teachers who have attained masters' degrees' will be eligible for salary premiums. This compensation strategy is offered concurrently with generous benefits offerings, support and coaching for development, and a respectful and professional working environment. All of this will make High Point Prep an attractive school for teachers and staff.

We have designed a pay strategy for teachers that is in line with our local area. The range for core content teachers is projected at \$48,200 to \$49,400 for our first year of operation, and we have used an average of \$49,400 to plan financially.

Our school will hold staff accountable for the success of students, using academic growth and proficiency. Our merit-based approach will be utilized to appropriately acknowledge teachers' success. NHA-partner schools employ a "Total Rewards" compensation structure, and we propose to do the same, benefitting from their tools to reward staff who have a tremendous impact on student learning and achievement. The Total Reward program includes: market increases for the first three years of teaching and merit-based salary increases moving forward; competitive and low-cost health insurance choices and plans; control of a 401(k) retirement plan (traditional and Roth) with an employer-match component; life insurance; tuition reimbursement; loan forgiveness; and, employee recognition and reward programs.

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



High Point Prep will implement practices and procedures to appropriately respond to any potential employee grievances. As noted, our deans will act as the first point of communication for teachers. Concerns may then rise to our school's principal or NHA's Service Center. Should these options not resolve employee concerns, staff may then present their grievance to the Board.

High Point Prep staff will serve our school on an at-will basis, and our teachers will be jointly employed by our Board and NHA. School leaders will create the staff structure in accordance with expertise, strengths, performance, and how to best meet the needs of students who enroll with us. Structures will be implemented for ineffective staff. This may include termination, as necessary.

In the event a staff member's performance is found to be unacceptable, and dependent upon the degree, circumstances, and nature of incident(s), appropriate disciplinary responses may be warranted. Examples include warnings, initiation of performance coaching/improvement plans, suspensions, or administrative leave. If expectations are not met upon the implementation of appropriate interventions, or if a significant violation of policies and procedures takes place, termination of the employee may be necessary. Our Board will be required to review all recommendations for termination and take action accordingly. Our school's employee handbook is distributed to employees before or on their first day of employment, and includes information on corrective-action and termination.

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

We do not anticipate any positions at High Point Preparatory Academy to require dual responsibilities within or outside of our school. Should the need arise for a role with such responsibilities (within our school), we will ensure the position is funded appropriately, accounting is accurate, and we meet all compliance requirements. An example may include a school social worker who is funded from our general budget who also meets the needs of EC children through EC funding.

**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.**



Our school will recruit licensed EC teachers to offer high-quality instruction for exceptional children. We will hire additional staff members to offer support and we will also hire or contract for an occupational/physical therapist, speech therapist, social worker, and school psychologist. These team members will meet the needs of every student who chooses to enroll with High Point Prep. We will make certain our school complies with credentialing requirements and each year will examine the need for any additional staff to offer services for EC, EL, and gifted students.

Included in our first-year proposed budget is funding for full-time equivalent (FTE) staff to meet the needs of Exceptional Children and English learners. Once our school is fully enrolled, we anticipate having 5.0 FTE EC teachers, 11.0 FTE interventionists, teacher assistants, and instructional support staff, and 1.0 FTE social worker. We also anticipate opening with and maintaining 1.0 FTE EL teacher and will adjust as student needs require.

**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).**



Through our services agreement with NHA, our Board will jointly employ High Point Preparatory Academy's teachers. NHA will employ our school's administrative and non-teaching team members.

### **Principal**

High Point Prep's principal will be dedicated to achieving the school's mission and vision. Qualified candidates will have a documented record of achieving significant student growth. Additional requirements include strong leadership and management skills, as well as the ability to offer instructional support for teachers. Our principal must be committed to cultivating and fostering a school culture, promoting student achievement, and implementing our school's operations. Candidates for our principalship must have a bachelor's degree (master's degree preferred) and three or more years related experience and/or training or equivalent combination of education and experience. They must demonstrate exceptional language and math skills, reasoning ability, and interpersonal skills. Candidates must also possess all required administrative licensure.

### **Deans**

High Point Prep's deans will share administrative duties with our principal. These team members will be responsible for:

- Mastering/modeling all aspects of the classroom framework;
- Building relationships with/among teachers and investing in the success of all staff members;
- Coaching teachers on the path to instructional mastery;
- Holding teachers accountable to college readiness through development and training;
- Analyzing student/grade-level cohort data and using that to drive instruction, growth, and professional development; and,
- Ensuring High Point Prep/NHA procedures are promoted, modeled, and reinforced.

Dean candidates must have a bachelor's degree and a minimum of three years of experience in teaching or administration or an equivalent combination of education and experience. They will possess administrative licensure as required by law and will maintain superior language and math skills, reasoning ability, and will demonstrate an effective collaborative approach to mentoring and developing direct reports.

### **Teachers**

Teachers will possess the ability to:

- Communicate/work effectively with parents and families;
- Adjust teaching style and pace according to students' specific needs;
- Modify according to differences/changes in traits of students, programs, leadership, staff and our community;
- Implement varied teaching methodologies to meet students' personalized learning styles;



- Analyze tests/measurements of achievement; and (but not limited to),
- Work effectively as a member of our team.

Our teachers will be responsible to demonstrate abilities to implement the curriculum with responsibilities for:

- Coordinating with educational associates;
- Maintaining current achievement level data;
- Working with students below and above expected academic achievement;
- Recording accurate student records;
- Establishing classroom management;
- Ordering supplementary education materials;
- Seeking parent volunteers; and (but not limited to),
- Reporting all education-related activities to our principal.

Teachers must possess a bachelor's degree, meet state credentialing requirements, and have appropriate teaching licensure as required by law. EL and EC teachers and aides will also possess knowledge regarding education strategies and approaches particularly suited to the student populations they serve (and be appropriately certified).

#### 10.4. Staff Evaluations and Professional Development

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

NHA's credentialing team will house and manage teacher licensure/professional development compliance and appropriate reporting. NHA will present this information to our Board and other entities, as necessary.

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



Our school will utilize NHA's partner school model. The organization maintains a robust and successful staff development system that recruits, readies, and retains high-quality prospective school team members.

### **Mentor**

New teachers will be assigned a mentor teacher to address daily questions and concerns. Scheduled meetings will take place with mentors to offer ongoing support and insight in areas that may include instructional practice, classroom management, and curriculum. Our new teachers will receive classroom observation by their mentors on a periodic basis. Mentors will offer direct feedback upon completion of each classroom visit in order to improve instruction and management. We will require our new teachers to also take part in North Carolina's Beginning Teacher Support Program.

### **Retain**

Numerous factors support retaining high-quality instructional school staff members. These factors include:

- An environment promoting scholarly learning and a culture of building-wide respect for all students and staff.
- Detailed professional development plans and individual commitment.
- Frequent excellent coaching on instructional practice.
- Intentional tracking of high-performing teachers to positions entailing more responsibility (ex: mentors, content leaders, deans, and outstanding deans trained to become principals).
- NHA's "Total Rewards" approach to compensations (including performance-based raises).

### **Evaluate**

High Point Prep will utilize both quantitative and qualitative measures in order to evaluate teacher performance (in compliance with applicable law and policies). Our school will implement a pay-for-performance compensation structure, using NHA's internal evaluation tool, and also student achievement, to measure performance.

The classroom framework described above will include the classroom framework, as well as:

- *Professional accountabilities*: Teacher embodies expectations of professional accountabilities through dependability, dedication, communication, and teamwork.
- *Quality of student learning*: Teacher achieves expected performance in academic proficiency and growth as measured by state tests. Makes satisfactory progress toward necessary growth expectations on formative assessments.

High Point Prep deans will evaluate teachers on an annual basis using data from regular coaching sessions during the school year. A combination of regular observations, coaching, mid-year check-in, and year-end evaluations help structure professional development goals for each teacher and form the basis for teacher evaluations.



**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.**

High Point Prep will foster a high level of instruction via clear expectations, frequent observations and feedback, and an intentional focus to develop teaching practices. Our school will implement professional development across our community and culture, initiated with a rigorous orientation and training experience ahead of our first year. Ongoing development will be of great importance, and will be implemented as an intentional part of our school year calendar. This will include:

- Mentor teachers for new teaching staff.
- Regular coaching/feedback sessions.
- Formal training sessions.
- Weekly grade-level team meetings with deans to support a mutual approach to instruction.
- Creations of professional learning communities.
- Daily time for common grade-level planning.
- Grade-level and cross-grade-level team meetings scheduled for teachers to collaborate on increasing student learning and achievement.

Teachers at High Point Prep will be able to access a wide variety of learning opportunities through our partnership with NHA. These opportunities include video libraries, conferences, virtual learning, web-based resources, and dedicated curriculum and instruction specialists.

*Effective implementation:* High Point Prep's school leadership will lead efforts to determine professional development needs. These team members will partner with NHA to create a customized plan founded upon the identified needs. Our school leaders will annually complete a comprehensive assessment of the educational program and operations of High Point Prep. Teachers will then develop a School Improvement Plan (SIP), analyzing student achievement, the school environment, the teacher and parent communities, and the administration. Our SIP will offer a strategic plan to fulfill needs, and both individualized and school-wide professional development efforts will be utilized to meet noted needs.

**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 challenging aspects of the curriculum and instructional methods.**



## Prior to school year

Each new teacher hired before the start of our school year will enroll in New Teacher Summit (NTS). This training is scheduled across multiple days and is structured to immerse teachers into our mission and vision. New teachers will also receive development around curricular and instructional needs. This is actively supplemented with continuous coaching and additional training over the course of the school year. NHA has created a collection of effective, industry-leading practices. These are utilized throughout NHA's partner schools to construct a mutual approach for generating outstanding academic results.

NTS will teach school staff why practices are effective for students and understand their impact in daily activities. This includes classroom management and instructional planning. Teachers will master these principles both as they happen in a classroom setting and as they exist throughout High Point Prep. New team members will be empowered to apply these practices from the moment they enter our school.

A sample agenda during NTS includes the following:

- *Day one:* Classroom Culture; Purpose and Vision; and, Behave with Care.
- *Day two:* Classroom Culture continued.
- *Day three:* Curriculum and Curricular Tools; Grade-Level Best Practices.

Our school culture and climate will begin during NTS when our teachers and leaders engage in NTS. They will learn the practices necessary to connect with students, establish expected behaviors and routines, and manage classrooms. NTS concentrates on creating a positive and proactive culture and self-management of classrooms by training teachers how to master the following:

- Structure the classroom in a manner that promotes responsible student behavior.
- Engage students in cultivating school culture.
- Intentionally develop strong positive relationships with students.
- Clearly teach students how to act responsibly in all classroom situations.
- Invest additional time, attention, and energy to value responsible behavior than to respond to acts of misbehavior.
- Pre-plan responses to misbehavior to make certain they are brief, calm, and delivered in a consistent way.

Our new teachers and leaders will learn the tenets of effective instruction and the strategies utilized to enhance learning in each of the core content areas. All grade-level teachers will receive specific training covering the use of the pieces of curricular tools.

NTS participants will be able to interact with and receive instruction from other master teachers in their specific content area/grade level. These sessions focus on developing plans for classroom management, analyzing High Point Prep's moral focus curriculum, reviewing high-quality instructional practices, and collaborating on practical ideas for working with different student groups. EC and EL teachers are included in this, and they will be trained in related topics by master EC and EL teachers, as well as area experts from



NHA.

### **Ongoing opportunities**

Additional school-based staff training will take place in the days leading up to the first day of school. This training supplements what staff learns in NTS, and will communicate additional expectations, including non-instructional practices and procedures. This provides staff the chance to conduct grade-level planning with peers, deepened knowledge around core concepts related to common assessments, building relationships with students, classroom management, and school-wide behavior support systems.

One benefit of our partnership with NHA is the extensive collection of virtual learning courses available to teachers. NHA maintains an extensive library of virtual learning courses that are made available to school staff. All virtual learning is classified by educational topics to provide school staff easy access to resources to immediately meet their specific area of need. These courses and others are available to all school leaders and can be accessed from any location, at any time.

Our professional development offerings will not be limited to the stated initiatives, as we will continuously increase offerings that provide our staff with the best training that results in high student achievement.

**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.**



Our annual calendar, daily schedule, and organizational structure will contain professional development opportunities for our school staff. Our school leaders and teachers will also engage in ongoing opportunities throughout the summer, including extensive preparation ahead of High Point Prep's initial year of operation.

As noted, our staff members will complete New Teacher Summit (NTS) and NHA's Leadership Summit. Taking place over the course of a week, these are collaborative and intensive trainings that bring together peers from across the country (NHA partners with 99 schools). Our school is planning for seven days during the school year for professional development, including time to focus on EC and ELL students. Our school day will include 45 daily minutes of planning time for each teacher.

No less than weekly, our school will hold grade-level team meetings. Planning periods of 30 minutes each week will be scheduled for individual teachers to hold one-on-one meetings with their assigned grade-level dean. This time allows for coaching, feedback, and development. Our school leaders will hold full staff meetings as appropriate, ensuring these meetings do not conflict with teaching and learning. Teaching staff schedules will be created that allow for cooperative and collaborative meetings with parents.

High Point Prep's staffing structure is conducive with our school's daily calendar. It allows core-subject teachers both individual and common planning time, and is scheduled to take place while students are receiving instruction in "specials" or electives. These include art, physical education, music, library and technology, college credit opportunities, among other areas.

Professional learning communities will be created to support collaboration among peers and allow common grade-level planning to take place. In groups, teachers will analyze the current week's lesson plans and schedule lessons with common delivery and alignment to High Point Prep's curriculum. Our intention is to build a calendar and staff structure that allows for regular grade and cross-grade level team meetings. This will allow teachers to share best practices for increasing student learning and achievement.

We will place an emphasis on offering extensive professional development and training opportunities focused on instruction and serving EC students. Staff will take part in regional EC training in concert with other NHA-partner schools. Trainings will cover topics that include the following:

- Individualized Education Plans (IEP) and their components.
- Comprehensive Exceptional Children Accountability System (CECAS) training.
- Effective instructional practices for students with disabilities, including its application to state standards.
- Roles and responsibilities for EC team members.
- Evaluation reports for students.
- Positive behavior supports and building relationships with students.
- Review of NHA's extensive special education manual.
- Mission, vision, and purpose of NHA's Division of Special Education.



Our staff will also take part in regional trainings offered by NCDPI.

NHA's special education team will provide our staff with extensive support to make sure best practices are in place for our students. They will cover and provide detailed handbooks and processes for EC programming. Handbooks will offer guidance on information confidentiality, accountability, discipline procedures, maintenance of effort, and additional topics.

## 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)).



High Point Preparatory Academy does not intend to target a specific student population. Our intention is to be a high-quality choice for students from all backgrounds. We will implement marketing and outreach efforts in order to achieve full enrollment and promote extensive awareness of our school across the High Point community. We will ensure High Point Prep is a strong and dynamic part of our area, market to all families, and maintain a goal of attracting a student population reflective of the demographics of the local school district.

Our Board's deep understanding and knowledge of our community, as well as NHA's expertise with outreach will establish a foundation of informing families about High Point Prep. We will partner to understand the interest of potential families utilizing diverse focus groups in our community, polls or surveys of public opinion, and more. Our efforts will provide a greater depth of understanding in our community, understand educational needs not met by current choices, and gauge how attractive High Point Prep is to area families.

Should our proposal for High Point Prep be approved, our marketing efforts will intensify. We will hire a dedicated local admissions representative prior to our first day who has strong ties to and knowledge of the community. This representative will leverage our Board's knowledge and will begin a grassroots marketing effort under the guidance of an experienced admissions manager. This will involve cultivating relationships with community organizations, including with daycare providers, local chambers of commerce, community businesses, area churches, temples, and other houses of worship, HeadStart and other community education programs, and youth activity centers.

Traditional advertising outreach will also be utilized. This may include outdoor advertisements (municipal buses and stops, billboards, etc.), radio commercials, television announcements, local and community publication advertisements, and internet media ads. These undertakings will begin well in advance of our first day of school, and all efforts will be funded by NHA.

Monthly enrollment information meetings will be scheduled for families and held by representatives of our school. Meetings will be marketed through a variety of channels (digital marketing, direct mail, and grassroots efforts). Families will be informed of our mission, educational program, and vision, and will have opportunities to ask questions and become familiar with members of our team.

Should it prove necessary, multilingual representatives will be present at our meetings who speak the most prevalent home languages. We want to make certain we are able to converse with as many families as possible in their home language. Prior to meetings, we will share school and meeting details in these languages to area organizations that provide services to EL families.

We will schedule events specially planned for parents of students who have special needs. These families will have the chance to learn more about how High Point Prep will successfully serve EC students. These meetings will be an open forum, providing families a chance to hear about what is most important to them



when choosing a school for their child.

Families who decide to enroll their student with us will be invited to additional parent information meetings to hear more details about our educational program, meet our school leaders and staff, learn more about the moral focus curriculum, and hear how they can take an active role in their student's education. There will be a social component during these meetings to encourage parents to collaborate with us in designing a strong school culture and community well before our first day.

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



### **Parent communication prior to school opening**

We know strong parental involvement in our school is often a product of strong school-to-home communication. High Point Preparatory Academy will have a commitment to creating and maintaining an environment of open conversation among parents, school leaders and teachers. This dynamic will begin upon approval of our charter proposal. We will inform families of our mission and contact them through a wide array of practical methods. This will inform families of our school, how enrollment takes place, and how to be active in High Point Prep.

We will make families aware of the latest events of our school as we approach our first day. We will do so through methods to include a monthly newsletter, website, and Facebook page. Social media websites will be used to help form and maintain connections between school leaders and parents. While our school is being constructed, a temporary school office will be available on or very near the school site as a point of contact with staff for the school's prospective parents. This pre-opening rapport with prospective parents will peak with a family orientation held at the end of the summer to allow enrolled students and their families to meet the principal, the student's teacher and classmates, and other school staff.

### **Parent engagement**

We will offer parents opportunities each year to complete a survey called "Voice of the Parent." Voice of the Parent is designed to learn and understand parents' expectations and student needs. Further, it allows High Point Prep to meet those expectations and needs. The survey is designed to systematically drive action and accountability so that we remain parent-, student-, and community-focused. These surveys will be confidential, and the feedback received will be compiled into summary statistics for use at the school leadership and Board levels.

We will encourage parents to be present and active. To do so, we will include a dedicated parent room. This will offer parents a place to gather and cultivate relationships with one another, talk about matters of mutual interest, and assume ownership in High Point Prep. Our parents will have access to Parent Portal, High Point Prep's secure online student information platform. NHA's designed platform is accessible from computers with internet access or via a mobile application available for download. The Parent Portal will provide information related to assigned student homework, offer resources for homework assistance, present student scores on various assessments, provide growth information, and host newsletters and school calendars. The system is designed to synchronize with teachers' monitoring of student progress and to help remind teachers of previous and ongoing student needs.

We will engage parents in their students' learning. Ahead of each school year, we will inform families and students of grade-level performance expectations. Student progress against those goals will be communicated to parents regularly through direct teacher communication, progress reports, report cards, and parent-teacher conferences.



Parents also will be encouraged to help form clubs or groups to support extracurricular or school-time activities in the building. We will facilitate the formation of a parent organization at our school. Our Board will expect that the parent organization support our mission and student body in all it does and will report to the Board frequently on the organization's initiatives. We will ensure that our parent organization has the necessary policies and procedures in place to stay in compliance with law, including those necessary for sound financial management.

**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.**



Upon notification of an approval of our proposal, we will work with NHA to continue building relationships within the community and with parents. We will contact families to inform them about our school's mission, our enrollment process, and how to participate in various aspects of High Point Prep. This may include radio and television advertisements, billboards, bus advertisements, and other paid media options. Families will be mailed flyers, as well as invitations to take part in parent informational meetings. Additionally, we will send notices of opportunities to meet our principal and other school representatives.

Our school website, Facebook page, and a monthly school newsletter will inform interested families of the most current events at High Point Prep ahead of our first day. Social media websites will be utilized to form and maintain relationships between school leaders and families. Even while our facility is being developed for occupancy, we will put in place a temporary school office. The principal and school staff will use this space to remain in contact with prospective parents and offer information for the community.

In the months leading up to our first day, staff and families will cultivate relationships that will strengthen and sustain our school community and culture. A successful pre-opening rapport will apex with a family orientation at the end of summer to offer enrolled students and families an opportunity to meet school leadership, teachers and classmates, and other school staff.

Strong community knowledge will be key to the early success of High Point Prep. We will have on staff – at NHA's expense – a dedicated local representative with a keen understanding of our area. This team member will leverage the Board's knowledge and NHA's experience to lead grassroots marketing. This individual will build community relationships, including outreach to area daycare suppliers; local chambers of commerce and other community businesses; area churches, temples, and other houses of worship; HeadStart and other community educational programs; and Boys/Girls Clubs, YMCAs, and other youth activity centers.

Our initial proposed enrollment goal is 520 students for our first school year. This quickly meets a growing demand for additional high-quality educational choice school seats utilizing the NHA model.

The High Point Prep Board of Directors has strong relationships and ties to the community. We have already started outreach among our various networks, and will only elevate these efforts upon the approval of this proposal. We have circulated petitions of support for High Point Prep and will prioritize word-of-mouth marketing, especially due to the trust we wish to build and maintain across the community. Our school will hire an admissions coordinator who understand our area to work with our Board and NHA on outreach efforts.

We have vetted NHA and found that their more than 25 years of experience has resulted in strong outcomes for students. This is especially true with schools similar in size to the one we propose. Their record of success is documented in research, including by Stanford University's Center for Research on Education Outcomes (in multiple studies) and the University of Michigan.



We are confident we will meet our initial enrollment goal, as well as our goals to fill the school upon adding grades. However, the arrangement of our services agreement guarantees High Point Prep to be operationally and financially viable regardless of whether or not we meet the 520 enrollment mark. NHA is obligated to provide the entire educational program irrespective of student enrollment and we do not have to enroll the school to a certain level to guarantee this partnership.

A facet of NHA's longstanding experience with enrolling new schools across different communities has given the organization insight in historical trends. This helps to establish a forecast that allows the climate and culture to successfully accommodate growth. Based on the analysis of the area, we anticipate receiving over 1,000 applications for the 520 seats we initially propose to offer.

Additional metrics will be utilized to understand whether or not we are tracking towards our goal of 520 kindergarten through fifth grade students in our initial year. We will use social advertising on Facebook and Instagram, digital advertising on Google and Bing, and traditional media that may include radio, billboards, and television. We anticipate these metrics to result in receiving 300 leads and letters of intent ahead of opening enrollment for applications. This is 30 percent of our total forecasted applications.

**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 at-risk of academic failure. If your school has a specific area of focus, describe the plan to market that focus.**

Should it be necessary, our parent information meetings will include multilingual representatives who speak the most prevalent home languages to make sure we are able to converse with as many families as possible in their home language. Prior to these meetings, we will distribute school and meeting information in these prevalent home languages to area organizations that provide services to EL families.

Events will be scheduled specially designed for parents of students with special needs. This will offer a forum for families to receive additional information about High Point Prep's services for EC students. Meetings will be an open conversation and will provide information about our school.

Parents with an interest in enrolling their students will be invited to special parent information meetings that provide additional details on curriculum, to meet the principal and teachers, gain insight about our moral focus program, and learn how to take an active role in their students' education. Meetings will include a social component for parents to join together in the development of a strong school community prior to its opening.

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



Strong community knowledge will be key to the early success of High Point Prep. We will have on staff – at NHA’s expense – a dedicated local representative with a keen understanding of our area. This team member will leverage the Board’s knowledge and NHA’s experience to lead grassroots marketing. This individual will build community relationships, including outreach to area daycare suppliers. High Point Prep will become a member of the High Point Chamber of Commerce; build relationships with the following: The High Point Museum, the Nido & Mariana Qubein Children’s Museum, Boys & Girls Club of Greater High Point, The Salvation Army Boys & Girls Club of High Point, Carl and Linda Grubb Family YMCA of Archdale/Trinity, Carl Chavis YMCA, Hartley Drive Family YMCA, YWCA of High Point, the Salvation Army of Greater High Point, United Way of Greater High Point, Kiwanis Club of High Point, High Point Public Library, High Point Theatre, Carousel Theatre, Big Brothers Big Sisters of the Central Piedmont, Backpack Beginnings, Guilford Technical Community College, High Point University and other community businesses; area churches, temples, and other houses of worship; HeadStart and other community educational programs and activity centers.

For the first time in the organization’s history, NHA partnered with an existing school, Phoenix Academy, in Guilford County. High Point Prep will benefit from the proximity of Phoenix Academy to our proposed location. This partnership provides our staff the opportunity to gain and share best practices. Our staff will also participate in regional professional development that will reinforce material from earlier development sessions while adding emphasis on one select NHA-wide initiative, such as interim assessments.

## 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.



High Point Preparatory Academy will implement the four pillars discussed throughout our proposal as the foundation of our school. One of these pillars, parental partnership, is the key to a high level of robust school-and-home communication. We commit to fostering and maintaining a school environment where open dialogue among parents and school leaders and teachers is encouraged. These partnerships will start as soon as possible, likely upon approval of our application. Relationships will be based upon our mission, and families will receive communication and updates on our school through various methods. This includes understanding how enrollment will proceed and how parents and guardians can become involved in the school.

High Point Prep will maintain a monthly newsletter, school website, and social media to apprise interested families of our school's events ahead of our initial school year. We will use social media to build and maintain relationships between our school leadership and families. Our school will have a temporary office open either on or nearby our school facility as NHA constructs our school facilities. This will allow for an additional point of contact for families with staff. Efforts to build relationships prior to opening will culminate with a family orientation held at the end of summer. This will offer families a chance to meet school leadership, students' teachers and peers, and additional school staff.

**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.**



Parents will have opportunities each school year (including our first year) to offer feedback through a survey called “Voice of the Parent.” The survey is designed to understand the expectations and desires of our families, as well as to make sure we meet those expectations and desires.

Our Board and NHA will use the survey to keep focus and priority on students, parents, and our community. Surveys are confidential and the responses are organized into summary statistics to be used at both the school leadership and Board levels.

Our intention is for parents and guardians to have a high degree of presence and involvement with High Point Prep. We will foster this belief by including a dedicated parent room in our school design. This will provide parents with a location to gather, cultivate relationships, discuss important topics and interests, and generally be involved in our school.

As noted, our school will utilize a Parent Portal. Parents and guardians will have the ability to access this student information system designed and developed by NHA via any computer with internet access or through a mobile application available to be downloaded. This secure portal offer information pertaining to schoolwork, resources for help with homework, updates on academic standing, growth information, newsletters and calendars, as well as a way to communicate with school staff. The Parent Portal is in sync with tools available to teachers that assist in the monitoring of student progress and as another support for staff to stay up-to-date on past, current, and future student needs.

Our parents and staff will continually be in contact with one another to discuss student learning. Ahead of each school year, families will be made aware of grade-level performance expectations. Progress compared to goals will be communicated on an ongoing basis between teachers and parents, as well as through progress reports, report cards, and parent-teacher conferences.

**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.**

Our Board and school leadership will advocate for students to take part in extracurricular and school-time activities. We aim to provide a well-rounded high-quality educational experience. Doing so will involve students taking part in these activities. We will support parents interested in starting clubs or groups, and we anticipate facilitating the formation of a parent organization. In partnership, we believe this organization will supplement the mission we establish for High Point Prep. Our Board will request updates from the parent organization to frequently understand current initiatives and programs. We will work to make certain the organization complies with all applicable requirements, including with regard to fiscal management.

**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)).
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.



High Point Preparatory Academy will remain in compliance with all applicable state and federal laws regarding admissions. Our school will not discriminate on the basis of intellectual or athletic abilities, measures of achievement or aptitude, disability, status as a handicapped person, homeless status, English proficiency, religion, creed, race, color, national origin, or any other basis that would be illegal for a public school.

### **Open Enrollment Period (OEP)**

If our application is approved for a charter, we will establish an OEP for the first year of operation prior to June 30 and will publish a notice of open enrollment. Our OEP will be no less than 30 calendar days. During a public meeting, we will confirm the notice of the OEP and the application process, a process designed to ensure that people most likely to be interested in the school are informed. NHA will widely share the OEP notice on our Board's behalf.

### **Applications and lottery**

We will begin accepting applications for the school year on the first day of the established OEP. If we receive more applications during this period than the offered seats of any grade level, a random selection process will be utilized. Should we receive fewer applications than offered seats in every grade level, all eligible applicants will be accepted.

Applications received after the OEP will not be eligible to participate in the random selection process. Should there be open seats, late applications will be added to the end of our accepted list in the order in which we received them. If no seats are available, late applications will be added to the end of the waiting list or, if a late application is entitled to preference, inserted in the waiting list immediately before all applicants on the waiting list with a lower enrollment-preference category.

A list with the name of each student who submitted an application during the OEP will be created with the student's name, birth date, grade level, street address, and names and grade levels of any siblings who are also applying for admission. From this list, an electronic card will be created for entry into the random selection process. If siblings apply for the same school year, one surname card will be entered into the random selection process to represent all of the siblings applying at the same time. If that surname card is selected, then all of the siblings shall be admitted, except that siblings who are not multiple birth siblings may be admitted only to the extent that space is available and does not exceed the grade-level capacity. If a card is drawn and there is no space available in the appropriate grade, applicants will be placed on the waiting list in the order in which they are drawn. After the random selection process is complete, late applications will be processed in accordance with the procedures above.

When a seat becomes available in a particular grade due to attrition, erosion, or other event, that available seat will be offered to the first student on the waiting list for that particular grade.



### Reenrollment

Students enrolled in the school will be eligible to reenroll for successive years without entering the random selection process. All applicants on a waiting list must re-submit an application for the following school year to be eligible for enrollment.

### Preferences

Once a student has attended the school, he or she will be given first preference to enroll for the subsequent school year. Children of members of our Board and children of the school's full-time employees also will be granted preference. After that, preference will be given to siblings of students reenrolling at the school.

### Withdrawals/transfers

When a student withdraws, that creates an open seat to be filled by another student through the waiting list process outlined above. Students wishing to legally transfer into the school mid-year may submit a late application, which will be processed as outlined above.

## 10.8. Certify

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

- Yes
- No

Q204. Explanation (optional):

Our Board has had the opportunity to review and consider this proposal. We also voted to submit the application as written. Our Board acknowledges many components could be similar to other NHA-partner schools with regard to operations. As such, significant portions of this proposal are similar to others submitted in previous years.



## 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



Our school will strive to make certain High Point Preparatory Academy is accessible to all families and that transportation will never be a barrier for student attendance. We do not intend to offer bus transportation to the general student population, but we will offer parents and guardians resources and support to coordinate their transportation needs. We will provide transportation as required by any individual student's IEP, 504 plan, status as a student experiencing homelessness, or other applicable law.

We plan for our students to have experiences in the community in the form of field trips. When opportunities are presented for students to supplement classroom lessons with field trips, we will contract for appropriate transportation as needed.

Because High Point Prep will not provide transportation to the general student population, the school will help parents address student transportation needs. A successful learning experience would be impossible without parents' partnership and dedication. NHA-partner schools nationwide have benefitted from collaborating with parents to address transportation needs.

School teachers, administrators, and staff will greet students and parents during morning drop-off and afternoon pick-up. This practice offers students a transition between school and home that is comforting, smooth, and welcoming. Students arrive to school more focused on the day and with low levels of anxiety and distraction often attributed to school bus rides. This will also allow our staff to have an additional opportunity to connect with parents and guardians. Parents and guardians will have the chance to be an integral part of the school day. This process will enhance the sense of community at our school . Additionally, this approach to transportation has proven results as it has been successfully implemented at NHA's other partner schools across the state.

High Point Prep will implement a software called Driveline to facilitate the process when parents arrive to pick up their student. This program allows students to remain in classrooms until a parent or guardian has arrived on school property. Classrooms then receive a non-disruptive notification when each student's parent or guardian is prepared for pick-up. This system is both efficient for traffic purposes and provides an added layer of safety.

We understand that this approach to transportation is potentially not viable for all families in our area. For that reason, we will host an orientation program before the first day of school where we will work with parents to address, coordinate, and support their needs to make sure transportation is not a barrier for any student to attend High Point Prep. Our staff will also work to identify and plan the use of public transportation options that are available. If necessary, staff will arrange for transportation with private carriers. We also recognize, though, that our population may include students with transportation needs, including from outside the local area. Our included budget maintains funds to address those needs.

## 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:**

- 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.**

High Point Preparatory Academy will create an appropriate meals program, and no student will lack a daily meal. As part of the daily attendance process, teachers will ask each student if he/she needs a lunch or if one was brought from home, entering this information in the student data system. If a student does not qualify for free meals or have enough money in his other lunch account to purchase a meal, the teacher will notify the office so a lunch still will be provided to that student. The school will maintain a discretionary account to be charged for this purpose, if necessary, to make certain each student has lunch every day.

On behalf of our school, NHA will contract with a food service provider to operate our program, following U.S. Department of Agriculture (USDA) procurement requirements and complying with Federal Regulation 7 CFR 210.16 and other applicable law. A hot meal for lunch will be offered daily, and a cold breakfast will be offered if needed. Students will pay a set price for school meals unless they qualify for free or reduced-price meals under the National School Lunch Program. NHA has experience in handling all the required aspects of these programs, and the Board will hold NHA accountable to ensure the efficient management of our school's breakfast and lunch programs. As necessary, we will look to the North Carolina Department of School Nutrition Services for resources in overseeing the compliance of our food-service program.

All meals will meet the nutritional requirements set by the USDA in accordance with the National School Lunch Program. Our food service provider will provide extensive support to the school with menu planning, nutritional analysis, food-handling safety, and sanitization.

We recognize the importance of providing healthy meals to our students, and our goal is to meet students' nutritional needs to ensure that they focus on the work of learning and not on their physical hunger.

### **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

**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

**Resources**

Insurance Coverage Te...

**Applicant Evidence :**

High Point Preparator...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

**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



Applicant Evidence :



Appendix L - Insurance...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

### 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

### 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).



Upon the approval of our charter, our Board will meet regularly to discuss and approve plans necessary for the immediate success of High Point Prep. These meetings will be open to the public. We will take part in the state's Ready-to-Open process in accordance with requirements and meet all corresponding deadlines. We will benefit from the process that NHA has in place to open new schools, which includes timelines and tasks to ensure our school starts well academically, financially, and organizationally.

### **Facilities**

Our tentative facility construction timeline is provided in Question 212. This includes a plan for identifying, building, and finalization of our school building.

### **Marketing and enrollment**

We will begin advertising to families as soon as we are notified of approval of our proposal. Please see our marketing plan in Question 190 for more details about marketing, recruitment, and enrollment.

### **Staffing**

Our Board, in partnership with NHA, intends to identify a school principal by January 2024. Doing so will allow our school leaders to begin recruiting and hiring key staff members as early as possible.

We will leverage NHA's experience opening schools to have the sufficient systems, processes, and personnel in place to make certain High Point Prep opens successfully. We will certainly provide additional details, as necessary.

**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.**



NHA is able to mitigate many risks faced by new schools through its comprehensive services agreement and long-term commitment to its partner schools. Once a charter is awarded, NHA commits to purchase real estate and build or renovate a building all at no cost to the partner school board or taxpayers. NHA provides private capital to finance the facilities and sufficient cash flow to provide the desired high-quality programming, and more. Our with NHA will allow our school to avoid the many risks new charter schools encounter.

In addition to providing our school with private capital to finance the facilities, NHA makes start-up contributions to the school. Our attached budget shows they will pledge a total of just over \$1 million in the first few years of operation. NHA is privately funded, and partner schools and boards have no obligation to raise philanthropic funding.

High Point Prep will open only serving grades K-5. We will add a grade per year until serving grades K-8 in 2027-28. This allows High Point Prep and families to build a strong school culture and community.

## 11.6. Facility

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.**



Our board has worked with NHA’s real estate acquisitions team to identify potential school sites. Upon approval of our proposal, we will work with NHA to build or renovate a 21st-Century-ready school facility suitable for High Point Preparatory Academy. Although we intend to open with grades K-5, we will build the school to house our entire K-8 program from day one.

As mentioned earlier in our proposal, High Point Preparatory Academy will meet the needs of our community to provide additional high-quality educational choices. In the 2018-19 school year (the most recent year with publicly available accountability data), Guilford County Schools had 124 schools that served 70,900 students. Thirty-five of the 124 schools were low performing. Eight of the 35 low performing schools are in High Point. By offering a new K-8 school overseen by our local Board, High Point Prep will increase learning opportunities for all students in the High Point area.

**Facility acquisition**

Our Board understands the challenges that many schools face in acquiring a facility that meets the needs of their intended educational programming. NHA pledges a multi-million-dollar up-front investment to cover site plan reviews, permits, construction, and construction-related costs. The start-up investments by NHA are deemed to be contributions to our Board, with no expectation of repayment. Our facility will be financed privately and built to house the entire planned K-8 academic program from day one, even though our school will be launched with fewer grades. Although this strategy may be more costly for NHA, it is valuable to us because it removes all potential disruptions as we deliver the academic program. We will not be distracted by ongoing construction or renovations as we add grade levels. Being able to occupy facilities specifically designed for our planned educational program is a huge benefit for our students and staff. We will avoid overcrowding or trying to fit our program into facilities designed for a different purpose. Our partnership with NHA will give us the exact facility we want and need for our program.

As a result of NHA’s experience navigating the land and construction processes, we believe High Point Prep’s school facility will be complete in time to open in August 2024 and meet the needs to accomplish our mission and vision. Included below is a tentative proposed timeline for construction. These dates are subject to change and may be amended, as possible and necessary.

<b>Task</b>	<b>Finish Date</b>
Search for Suitable Site	June 30, 2022
Select Suitable Site – Perform Due Diligence	July 1, 2023



Contract for the Purchase of Primary Site	September 30, 2022
Work to Obtain Entitlements (Land Use Approvals)	June 20, 2023
Close of Purchase of Property	July 1, 2023
Commence Site Development	September 1, 2023
Commence Construction	November 1, 2023
Complete Sitework and Construction	June 1, 2024
Obtain Certificate of Occupancy	July 1, 2024
School Opens	August 1, 2024

**Securing an educational certificate of occupancy**

Our Board and NHA will work to make certain we remain in compliance with all applicable building codes as High Point Prep’s facility is developed. NHA has experience in Guilford County and understands its requirements. We will ensure that we secure an educational certificate of occupancy from the local jurisdiction before High Point Prep’s opening. Since 2013, NHA has successfully constructed and opened nine new partner schools in North Carolina. One school opened in an alternative location as construction was completed on its permanent facility. We understand the challenge of construction delays and are provided updates on due diligence and processes related to facility development to ensure we do not experience delays. High Point Prep will have the necessary insurance coverage for its facility at or above the requirements of applicable law. Included as Appendix L is an insurance quote with coverage in all required areas. Some of these coverages fall within property insurance and umbrella policy specifications (including boiler and machinery, real and personal property, fidelity bonds, etc.).

**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.**

NHA will make a multi-million-dollar initial investment to complete site plan reviews, permits, construction, and related costs. High Point Prep and our Board make no payments. Our facilities, financed privately, will be constructed to successfully house our desired academic and extracurricular programming. Although we will open with kindergarten through fifth grades, our facility will be prepared to serve students in grades kindergarten through eight on day one. This strategy is likely more costly for NHA, but it is valuable to our success because it removes potential disruptions to our neighbors and our educational program. We will not have to experience renovations to grow our facilities in conjunction with enrollment increases.

Being able to occupy brand new facilities specifically designed for our planned educational program is a huge plus for our students and our faculty. We will be able to avoid overcrowding or trying to fit our program into buildings not designed to achieve our mission and vision. Our partnership with NHA will give us the exact facility we want and need for our program.

High Point Prep will encompass about 45,000 square feet, and will include enough space for a play area, a play field, and adequate parking. This safe, clean, and learning-friendly school will be accessible to all students. The school building will include: classrooms (28), student support rooms (7), media center/library, gymnasium, parent room, art room, music room, administrative spaces, and front office. As noted, the building will have space for our entire elementary school programming when High Point Prep opens, despite beginning with only grades K-5. This will allow our students and staff to leverage additional space in early years to build climate, culture, and implement key interventions and supports.

In the event we decide our partnership with NHA is not providing the desired outcomes for students, we will be prepared to terminate our services agreement. We would then begin to search for alternative sites for our school. However, we would still have continued use of the current facility for the remainder of any school year, and NHA must continue to manage and maintain the facilities. Further, our lease agreement provides us the option to lease the facility for one subsequent school year at the current rate. We are then free to purchase the building, negotiate a new lease (for which our independent legal counsel would offer insight), or find a different location for High Point Prep.

**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.**



As noted, our intended facility will be fully outfitted to serve students in grades K-8 from day one, despite only opening with grades K-5. NHA provides this benefit to avoid the distractions that ultimately occur if renovations are needed as a school grows. Our school plans to have an art room, a library/media center, main office, administrative spaces, a work room/copy room, as well as space for storage and supplies. We will also plan for space for a dedicated parent room.

**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.**

Our projected lease cost in year one with NHA is \$26.00/sq. ft. We are comfortable with these rates, as NHA is assuming all financial risk, buildings like ours are typically of single-use nature, and our lease is contingent upon our charter being renewed.

**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.**

High Point Preparatory Academy will encompass about 45,000 square feet, and the facility will include enough space for a play area, a play field, and adequate parking. This safe, clean, and learning-friendly school will be accessible to all students. The school building will include: classrooms (28), student support rooms (7), media center/library, gymnasium, parent room, art room, music room, administrative spaces, and front office. The building will accommodate the full K-8 program from day one, even though we will only start with grades K-5. This will allow the school to leverage the additional space in our early years for interventions and small-group instruction. NHA is providing an up-front investment that will purchase many of the needed items and equipment for the school.

If we ever determine our relationship with NHA is not producing our intended outcomes for the families and students we serve, our services agreement allows us to terminate the partnership with or without cause. Upon doing so, we would begin a search for alternate school facility options. However, High Point Prep will continue to have access to our school facility. Under provisions in a separate lease agreement, our school is authorized to stay in the facility for the remainder of any current school year, and NHA is obliged to continue to manage and maintain the facilities. Additionally, in our lease agreement, we will aim to have the option to lease the facility for a subsequent school year. After that, we are free to purchase the building, negotiate a new lease agreement (for which we would solicit advice from our independent legal counsel), or find another location for our school.

**Q217. Describe the board's capacity and experience in facilities acquisition and management,**



**including managing build-out and/or renovations, as applicable.**

Our partnership with NHA will afford High Point Prep with a school facility to sufficiently house our entire academic program. Our Board is one of governance, and we will delegate to NHA the responsibility of securing property for High Point Prep's facility. NHA will acquire the property, complete all necessary land entitlement processes, and manage construction.

NHA has a documented record of successfully acquiring land and constructing schools across North Carolina, and nationwide in 99 total schools. NHA is providing us with expert real estate assistance for this application.

Part of the commitment NHA has made to our Board is to provide an initial multi-million-dollar investment so that we are ready to meet the needs of our community from day one. This includes a campus that allows us to best serve all student groups with our chosen educational program. NHA will manage the construction process and report to our Board regularly on progress toward an on-time school opening. NHA will build and equip the facility as they do with other partner schools, complying with all health, building code, and safety requirements, including all requirements of the Americans with Disabilities Act. Given NHA's experience with this process, we are confident that our school will be completed in sufficient time for an 2024-25 opening.

### 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
- No

**Q219. Explanation (optional):**

Our Board has had the opportunity to review and consider this proposal. We also voted to submit the application as written. Our Board acknowledges many components could be similar to other NHA-partner schools with regard to operations. As such, significant portions of this proposal are similar to others submitted in previous years.



2022 NC CHARTER APPLICATION  
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.**

**Applicant Evidence :**


Appendix M - Revenue...

Uploaded on **4/27/2022**  
by **Kellie Jackson**

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


Appendix N - Propose...

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High Point Preparator...

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by **Kellie Jackson**



## 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?

High Point Preparatory Academy will open serving 520 students in grades kindergarten through fifth. We intend to add one grade each year until we offer all of K-8 (772 students in total).

The lack of high-quality educational choice in our area has our Board confident that we will attract and enroll the specified student benchmarks. The demand from families at the five other NHA-partner schools in the county that utilize the NHA model only adds to the belief that our school will provide a high-quality school choice in Guilford County (Phoenix Academy is phasing in the use of the NHA model).

We did not establish a “break-even” point between student enrollment and our budget. The requested size and phased growth for the school is accommodated both by our planned annual student enrollment and a commitment from NHA to support the establishment of our complete educational program. NHA has pledged to contribute (not loan) all necessary funds for expenses that exceed revenues in any given year, providing the school with the comfort we need on student enrollment projections. While we are confident that we will meet our enrollment estimates included here, and thus revenue projections, the pledge of support by NHA assures our Board that we will never be in a position that requires cuts to our planned educational program. Our partnership with NHA also helps to make certain we have the ability to cover all expenses to meet all short-term obligations – including payroll – even prior to receiving the state, local, and federal funds due to the school. This is a significant benefit in the early years of our school, easing and improving our financial planning process.

### Q223. Provide an explanation as to why you believe there is a demand for the school that will meet this enrollment projection.

As noted, Guilford County lacks educational choice. To gauge interest in our school, we reached out to 150 families in High Point. Over 53 percent of families surveyed answered they would be very likely or likely to send their student to a new K-8 charter school in the area and nearly 68 percent of respondents asked to be contacted with additional information if a new charter school were to open within the community.

Additionally, the NHA model has proven to be effective and attractive to area families.

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



High Point Preparatory Academy will not establish a break-even point based upon enrollment. Our partnership with NHA bounds the organization to implement its complete educational program. This includes pledging funds necessary to cover any operating expenses that might exceed revenues, thereby ensuring we have sufficient cash flow. NHA is willing to make these investments because of its commitment to a “double bottom line,” a recognition that only sustained academic success can generate long-term financial sustainability. NHA embraces the primacy of academic success as both an operational reality and a core value. Our knowledge of the community and market research makes us confident we will attract enough students to meet projections on enrollment and revenue. Nonetheless, NHA’s pledged support ensures that the school will have the necessary resources to deliver our envisioned educational program.

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

Our Board’s services agreement with NHA requires NHA to commit all necessary funds to meet expenditures exceeding revenues in our school’s early years. This allows for plans and phased growth. We have included a budget that has been conservatively constructed. It includes an anticipated contribution from NHA of approximately \$715,000 in our first year (this is not a loan). An additional \$350,000 is included for year two. Being contributions, our Board is not obligated to repay any of these funds.

We will be able to provide our full elementary school facility and academic program in our first year, despite beginning with fewer students. Beginning in our third year, we anticipate revenue will cover our operating expenditures. Our services agreement gives us comfort in knowing NHA will ensure our needs will be met even if revenues decline.

**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.**

The included budget, especially for High Point Prep’s initial two years, reflects contributions from NHA. These funds are not loans, and our Board is not expected or obligated to repay NHA’s upfront investment. These funds are included in the line item “Other Funds.” NHA’s contributions are budgeted at approximately \$715,000 in our first year of operations and \$350,000 in the second year of operations.

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



High Point Prep's projected student-to-teacher ratio will be approximately 19:1 in years one and two, and 20:1 beginning in year three. Our budget is not built upon a specific ratio. However, the main drivers for budget expenditures are the number and anticipated characteristics of students to be served, the number of classrooms in use, and overall operational costs of the school. As the school grows by adding grade levels and classrooms in our early years, so does projected staffing. The planned staffing pattern allows for a concentration of core subject teachers while offering co-curricular classes (music, art, physical education, etc.), and provides for staffing for EC and EL students. The staffing model and budget reflect this 19:1 and 20:1 pupil-to-instructional staff ratio in the school's charter term.

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

This initial Board of Directors for High Point Preparatory Academy was formed by our Lead Applicant, Dr. Kellie Jackson. Dr. Jackson attended schools in High Point, prior to the merger of Guilford County Schools, High Point City, and Greensboro City. She has a background in education and has conducted extensive research regarding the necessity of a charter school in High Point. She has both the academic qualifications and experience to provide her the insight of the traits necessary to successfully oversee High Point Prep. She recruited our Board members to create a group that will ensure all families are afforded a high-quality educational choice. Our Board possesses experience in education, community engagement, government, and a desire to improve education in our area.

As the Board of High Point Prep, it is incumbent upon us to hold NHA accountable for the academic, organizational, and financial performance of our school.

**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.**



High Point Prep will aim to offer an educational choice for families that is high in quality and character. We will fulfill our mission by meeting this priority. We will do so for all families interested in enrolling with us, in partnership with NHA. A key component of our partnership with NHA is their support in achieving our mission and vision. This involves the implementation of its educational program. NHA commits the funds necessary to meet all operating expenses above received revenues. High Point Prep will have a positive cash flow as a result of our partnership with NHA.

Staff will always be compensated and expenditures covered against unforeseen instances as a result of our partnership with NHA. This is the case even before High Point Prep begins to receive per pupil funding. The included budget maintains a contribution from NHA for each of High Point Prep's initial two years (a total contribution of just over \$1 million). The absence of this financial security adversely impacts new charter schools, and our budget has been constructed to successfully serve students with special needs. We will not specifically know the needs of our students until a charter is granted and enrollment is opened. However, we find it vital to plan for resources that will meet the needs of our entire student population.

**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.**

Through our services agreement with NHA, the organization will provide High Point Preparatory Academy with all needed staffing, school services, and back-office functions. This includes purchasing, accounting, business services, informational technology, data reporting, data warehousing, human resources, grants management and payroll.

NHA utilizes a standardized human resource, purchasing, and payroll software system to internally manage all transactions related to the personnel, purchasing, and payroll functions. This administrative infrastructure supports full compliance with generally accepted accounting principles. NHA effectively manages compensation, payroll, and compliance for approximately 5,000 school-based employees in nine states and has the experience and efficiency to properly provide these services to our school. On behalf of our school, NHA will follow applicable state and federal law with respect to the selection of contractors and large purchases on behalf of the school, including competitive bidding or sole-source documentation as applicable.

**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.**



As High Point Prep Academy's Board, we are contracting with NHA through a services agreement. This agreement requires NHA to offer our school all needed staffing, school services, and back-office functions. This includes accounting, business services, purchasing, and payroll. NHA utilizes a standardized payroll, purchasing, and human resources software system to internally manage each transaction related to personnel, payroll, and purchasing. This supports complete compliance with generally accepted accounting principles. NHA has a high level of success managing compensation, payroll, and compliance for approximately 5,000 school-based employees in nine states. It has the needed experience and efficiencies to sufficiently provide these services for High Point Prep Academy. On our behalf, NHA will adhere to all applicable state and federal statutes, rules, and regulations with regard to the selection of contractors and large purchases. This includes competitive bidding or sole-source documentation, as necessary.

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

High Point Preparatory Academy will maintain a balanced budget for every year of its operations. NHA has a longstanding history of success opening and operating schools. It has committed to the start-up of each partner school's educational program by making additional contributions that supplement public revenues. NHA has never had a partner school closed as a result of financial issues of any kind. Additionally, no partner school has elected to terminate its partnership with the organization.

Our Board sees this as a display of NHA's strength to develop budgets and structures that offer the sufficient level of financial commitment to all partner schools' educational programs. The priorities and desires of High Point Prep's academic program include a distributed leadership model that allows for a high level of coaching; expansive professional development; an entire K-8 curricular program to emphasize ELA, math, science, and social studies supplemented with art, music, physical education, and other special and elective areas; and our character-building moral focus program.

NHA maintains a "Total Rewards" compensation structure coupled with competitive benefit offerings. This will assist our school in recruiting, hiring, and retaining high-quality team members. High Point Prep will have the necessary structures and supports to cultivate and foster a climate and culture that allows excellent teachers to grow in responsibility and leadership. We will commit to making certain High Point Prep is available to every student and that transportation will not be a barrier to attendance for any student. We have budgeted \$10,000 to cover the cost of extraordinary transportation needs. This includes students who are experiencing homelessness and EC students who require transportation according to their IEPs.

**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.**



Our budget includes a set-aside amount of funds equal to two percent of per pupil revenue (capped at \$35,000 each year) for use at the school per our Board's discretion. Our Board may expend these funds for educational and extracurricular interests beyond the proposed model educational and operational programs. We may also save these funds to create a reserve for future use. Our partner, NHA, has committed to the delivery of our desired educational program in accordance with a Board-approved budget, even if our expenses exceed received revenues. This commitment is outlined in our services agreement with NHA, and it clearly clarifies that NHA will assume obligation for all expenses. The agreement assumes all of our school's financial risk.

Due to their obligation to cover all planned costs, we will not require a substantial fund balance. Our Board maintains experience with education, local non-profit organizations, and community outreach. This experience has allowed our full Board to confirm NHA's financial commitment to all of its partner schools. Through our services agreement and Board accountability, NHA will be required to operate the school in accordance with the budget approved by our Board.

Expenditures during the academic year are not to deviate materially from our approved budget. If needed, the Board will review and approve amended budgets based on student need, and this could require additional spending. Covering this is also an obligation of NHA. Should our Board ever decide that it is best for our school to terminate our agreement with NHA, we will be able to continue leasing the facility and will have per-pupil revenue to fund our operations while we make decisions on how to replace their services or operate the school on our own. And while there is no forecasted substantial surplus, there also will be no deficit because of NHA's funding commitment. In turn, our Board would not have any debt to cover should we ever terminate our partnership with NHA.

As noted elsewhere in this application, the experience of other NHA-partner schools in North Carolina shows each of these schools consistently ending each year with a small budget surplus. We recognize the guidance from NCDPI that schools show additional indicators of financial viability beyond the proposed services agreement with NHA. NHA-partner schools in North Carolina (as well as in the other eight states where NHA partners with local boards to operate schools) consistently receive unqualified audits, meet total margin ratios, and do not carry long-term debt. No school partnering with NHA has ever been closed for financial reasons, and NHA has never walked away from a partnership with a school, even when enrollment or funding at the school has decreased.

In accordance with our services agreement, our Board will retain a discretionary expenditure fund to be used for Board-driven school purposes and programs. We are contemplating using these funds to create a fund balance and may set aside up to half of these funds each year to build an ongoing fund balance. We will revisit our fund balance needs after each year of operations as part of our annual evaluation of the performance of NHA. If, as we believe will occur, we are satisfied with the performance of NHA and with the strength the Board has under our services agreement, we will be comfortable choosing to reinvest these



funds in the educational program at our school. Our budget with this application does not reflect this potential surplus, as we chose to project satisfaction with our programming.

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

Our included proposed budget includes the assumption that no funds from banks, other lending institutions, outside corporations, or other sources will be required. High Point Prep intends to begin with grades K-5, and grow over the successive years to offer all of grades K-8. Our entire elementary school educational program will be established and implemented on our first day, and our full academic program will be in place for High Point Prep's fourth school year. We understand the benefits of initially occupying facilities constructed to house a full K-8 configuration, despite not offering all grades until our fourth year of operation.

NHA has pledged contributions sufficient to meet High Point Prep's operating expenses greater than revenues received in our early years. NHA provides as part of its partnership a school campus with facilities that meet the needs of our school's full capacity. Appendix M includes a letter of revenues assurances from NHA. This demonstrates its initial and ongoing investment in our school. Appendix A4.1 includes our executed services agreement with NHA, outlining the financing structure for High Point Prep.

**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.**

Our finalized services agreement with NHA states that it will purchase and provide assets on behalf of High Point Prep. We will not have assets from any additional sources.

### 12.3. Financial Compliance

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



Our Board will implement and follow a policy that outlines the fiscal management needed for the strong internal controls. We will ensure these are strictly followed by NHA and our schools. Some examples of the internal controls of High Point Prep will include: continually reviewing payroll information/reconciliation with the employee master file; employing an established signatory authority for both bank accounts and monthly account reconciliation; mandatory review and approval of purchase order requests; monthly analysis of detailed financial statements against our annual budget; utilizing an integrated computerized accounting system for all general ledger, purchasing, fixed assets and grant accounting, payroll, personnel and cash receipt/disbursements activities, and provides for segregation of duties.

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

Our Board is not aware of any possible known related-party transactions that could or will take place. We also do not foresee any potential related-party transactions. Our bylaws include language that mandates we avoid conflicts of interest. More specifically, our Board plans to implement a policy covering conflicts of interest.

**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.**

Our Board invited Plante Moran to present their services during our April 2022 Board meeting. We are confident they will serve well the needs of High Point Preparatory Academy, and voted to contract with the firm for an independent audit of our finances.

Name: Plante Moran

Address: 1111 Michigan Ave, East Lansing, MI 48823

Phone Number: 517-332-6200

## 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
- No



**Q240.Explanation (optional):**

Our Board has had the opportunity to review and consider this proposal. We also voted to submit the application as written. Our Board acknowledges many components could be similar to other NHA-partner schools with regard to operations. As such, significant portions of this proposal are similar to others submitted in previous years.



## 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



Charter School Requir...

### Applicant Evidence :



Appendix P - Required ...

Uploaded on **4/27/2022**  
by **Kellie Jackson**



## 14. Third-party Application Preparation

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

- Yes
- No

Q243. Give the name of the third-party person or group:

National Heritage Academies.

Q244. Fees provided to the third-party person or group:

N/A.



## 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.pdf



## 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 **Kellie Jackson**

Q247. Please digitally sign your application here

Signature





**Final Status**

Reject  Approve

**Approver Comments**

<b>Position</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
Principal	1.0	1.0	1.0
Dean(s)	2.0	3.0	3.0
Office Staff (registrar, office administrator, admissions representative)	3.0	3.0	3.0
Core Classroom Teachers	19.0	22.0	25.0
Specialized Classroom Teachers (special education, ELL, specials)	8.0	9.0	10.0
Student Support Positions (social worker)	1.0	1.0	1.0
Interventionists	3.8	4.0	4.3
Substitute Teachers	1.8	2.0	2.2
Teaching Aides or Assistants	1.8	2.6	3.5
School Operations Support Staff (recess aides, technology support)	1.4	1.4	1.4

Year 4	Year 5
1.0	1.0
3.0	3.0
3.0	3.0
28.0	28.0
10.0	10.0
1.0	1.0
4.5	4.8
2.4	2.4
4.9	4.9
1.4	1.4

**Board Member Name**

**Board Title**

Dr. Kellie Jackson

Chair

Dr. Chaka Walker

Treasurer

James McNeil  
William (Ed) Price

Secretary  
Director

Gloria Jackson

Director

**County of Residence**

**Current Occupation**

Guilford

Teacher/Mentor/Supervisor

Guilford

College Instructor

Guilford

Retired

Guilford

Real Estate Broker

Guilford

Early Childhood Center Executive  
Director

**Past or Present Professional Licenses Held**

North Carolina Educator 769085

Elementary Education (K-6)

Reading K-12

Language Arts 6-9

North Carolina Educator 1110775

Birth to Kindergarten

School Administrator: Principal

School Administrator: Superintendent

North Carolina Educator 818066

School Administrator: Principal

Curriculum Instruction Specialist

Real Estate License 37163

North Carolina Educator 768938

Learning Disabled K-12

Birth to Kindergarten

Mentor

Physical Education

Mentally Disabled (K-12)

**Any disciplinary action taken against any of these professional licenses?**

No

No

No

No

No

<b><u>Area of Proposed Coverage</u></b>	<b><u>Proposed Amount of Coverage</u></b>	<b><u>Cost (Quote)</u></b>
Comprehensive General Liability	\$1,000,000.00/occurrence	\$2,000
	\$1,000,000.00/occurrence;	
Officers and Directors/Errors and Omissions	\$3,000,000 aggregate	\$2,700
Property Insurance	\$25,000	\$400
Automobile Liability	\$1,000,000.00/occurrence	\$250
Crime Coverage - Minimum/Maximum Amount	\$250,000.00   \$250,000.00	\$5
Worker's Compensation	\$500,000.00	\$500
Other Coverage	\$4,000,000	\$2,500
Total Cost		\$8,355

**Academic  
School Year**

**Grade Levels**

**Total Projected  
Student Enrollment**

Year 1	K-5	520
Year 2	K-6	604
Year 3	K-7	688
Year 4	K-8	772
Year 5	K-8	772

## 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. Please indicate any plans to increase the grade levels offered by the school over time and be sure these figures match the 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:**

What percentage of students from this LEA are projected to attend this school?

**LEA #2:**

What percentage of students from this LEA are projected to attend this school?

**LEA #3:**

What percentage of students from this LEA are projected to attend this school?

Grade	Year 1			Year 2			
	LEA #1 410	LEA #2	LEA #3	LEA #1 410	LEA #2	LEA #3	LEA #1 410
Kindergarten	100			100			100
Grade 1	84			84			84
Grade 2	84			84			84
Grade 3	84			84			84
Grade 4	84			84			84
Grade 5	84			84			84
Grade 6				84			84
Grade 7							84
Grade 8							
Grade 9							
Grade 10							
Grade 11							
Grade 12							
<b>LEA Totals:</b>	<b>520</b>	<b>0</b>	<b>0</b>	<b>604</b>	<b>0</b>	<b>0</b>	<b>688</b>

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



jects to enroll. In addition,  
those on the initial cover

rticular level.

he LEA selected above will qualify for EC funding? 13%

he LEA selected above will qualify for EC funding?

he LEA selected above will qualify for EC funding?

Year 3		Year 4			Year 5		
LEA #2	LEA #3	LEA #1	LEA #2	LEA #3	LEA #1	LEA #2	LEA #3
		410			410		
		100			100		
		84			84		
		84			84		
		84			84		
		84			84		
		84			84		
		84			84		
		84			84		
		84			84		
0	0	772	0	0	772	0	0

set forth and approved in the projected enrollment tables. However, in

## 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:	410-Guilford		
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
State Funds	\$5,929.66	520	\$3,083,423.20
Local Funds	\$2,809.00	520	\$1,460,680.00
State EC Funds	\$4,800.62	66	\$318,281.11
Federal EC Funds	\$1,514.35	66	\$100,401.41
<b>Total:</b>			\$4,962,785.71

LEA #2:			
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
State Funds		0	
Local Funds		0	
State EC Funds		0	
Federal EC Funds		0	
<b>Total:</b>			\$0.00

LEA #3:			
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
State Funds			
Local Funds			
State EC Funds			
Federal EC Funds			

Total:

\$0.00

## 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 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
State ADM Funds	\$ 3,083,423	\$ 3,581,515	\$ 4,079,606	\$ 4,577,698
Local Per Pupil Funds	\$ 1,460,680	\$ 1,696,636	\$ 1,932,592	\$ 2,168,548
State EC Funds	\$ 318,281	\$ 369,696	\$ 421,110	\$ 472,525
Federal EC Funds	-	\$ 100,401	\$ 132,839	\$ 149,057
Other Funds*	\$ 986,443	\$ 668,840	\$ 375,419	\$ 431,573
Working Capital*				
<b>TOTAL REVENUE:</b>	<b>\$ 5,848,827</b>	<b>\$ 6,417,088</b>	<b>\$ 6,941,566</b>	<b>\$ 7,799,401</b>

\*All budgets should balance indicating strong budgetary skills. Any negative fund balances will, more than likely, generate by those evaluating the application. If the applicant is depending on other funding sources or working capital to balance the please provide documentation such as signed statements from donors, foundations, bank documents, etc., on the commiti 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 Apper



g on federal funding in

Year 5	
\$	4,577,698
\$	2,168,548
\$	472,525
\$	149,057
\$	441,106
<b>\$</b>	<b>7,808,934</b>

additional questions  
e operating budget,  
ment of these funds. If

ndix M.

**Personnel Budget: Expenditure Projections**

Budget Expenditure Projections	Year 1			Year 2			Year 3			Year 4			Year 5		
	Number of Staff	Average Salary	Total Salary	Number of Staff	Average Salary	Total Salary	Number of Staff	Average Salary	Total Salary	Number of Staff	Average Salary	Total Salary	Number of Staff	Average Salary	Total Salary
<b>Administrative &amp; Support Personnel</b>															
Lead Administrator	1.00	\$ 116,700	\$ 116,700	1.00	\$ 120,200	\$ 120,200	1.00	\$ 123,800	\$ 123,800	1.00	\$ 127,500	\$ 127,500	1.00	\$ 131,300	\$ 131,300
Assistant Administrator			\$ -			\$ -			\$ -			\$ -			\$ -
Finance Officer			\$ -			\$ -			\$ -			\$ -			\$ -
Clerical	1.00	\$ 30,700	\$ 30,700	1.00	\$ 31,600	\$ 31,600	1.00	\$ 32,500	\$ 32,500	1.00	\$ 33,500	\$ 33,500	1.00	\$ 34,500	\$ 34,500
Food Service Staff			\$ -			\$ -			\$ -			\$ -			\$ -
Custodians			\$ -			\$ -			\$ -			\$ -			\$ -
Transportation Staff			\$ -			\$ -			\$ -			\$ -			\$ -
Deans	2.00	\$ 62,800	\$ 125,600	3.00	\$ 64,700	\$ 194,100	3.00	\$ 66,600	\$ 199,800	3.00	\$ 68,600	\$ 205,800	3.00	\$ 70,700	\$ 212,100
Registrar	1.00	\$ 44,100	\$ 44,100	1.00	\$ 45,400	\$ 45,400	1.00	\$ 46,800	\$ 46,800	1.00	\$ 48,200	\$ 48,200	1.00	\$ 49,600	\$ 49,600
Admissions Representative	1.00	\$ 49,200	\$ 49,200	1.00	\$ 50,700	\$ 50,700	1.00	\$ 52,200	\$ 52,200	1.00	\$ 53,800	\$ 53,800	1.00	\$ 55,400	\$ 55,400
*** Edit text as needed. ***			\$ -			\$ -			\$ -			\$ -			\$ -
*** Edit text as needed. ***			\$ -			\$ -			\$ -			\$ -			\$ -
<b>Total Admin and Support:</b>	<b>6</b>		<b>\$ 366,300</b>	<b>7</b>		<b>\$ 442,000</b>	<b>7</b>		<b>\$ 455,100</b>	<b>7</b>		<b>\$ 468,800</b>	<b>7</b>		<b>\$ 482,900</b>
<b>Instructional Personnel</b>															
Core Content Teacher(s)	19.00	\$ 49,500	\$ 940,500	22.00	\$ 51,000	\$ 1,122,000	25.00	\$ 52,500	\$ 1,312,500	28.00	\$ 54,100	\$ 1,514,800	28.00	\$ 55,700	\$ 1,559,600
Electives/Specialty Teacher(s)	4.00	\$ 49,400	\$ 197,600	4.00	\$ 50,900	\$ 203,600	4.00	\$ 52,400	\$ 209,600	4.00	\$ 54,000	\$ 216,000	4.00	\$ 55,600	\$ 222,400
Exceptional Children Teacher(s)	3.00	\$ 49,400	\$ 148,200	4.00	\$ 50,900	\$ 203,600	5.00	\$ 52,400	\$ 262,000	5.00	\$ 54,000	\$ 270,000	5.00	\$ 55,600	\$ 278,000
Instructional Support	0.38	\$ 37,440	\$ 14,040	0.38	\$ 38,600	\$ 14,475	0.38	\$ 39,800	\$ 14,925	0.38	\$ 41,000	\$ 15,375	0.38	\$ 42,200	\$ 15,825
Teacher Assistants	1.75	\$ 22,800	\$ 39,900	2.63	\$ 23,500	\$ 61,688	3.50	\$ 24,200	\$ 84,700	4.88	\$ 24,900	\$ 121,388	4.88	\$ 25,600	\$ 124,800
English Language Learner Teacher	1.00	\$ 49,400	\$ 49,400	1.00	\$ 50,900	\$ 50,900	1.00	\$ 52,400	\$ 52,400	1.00	\$ 54,000	\$ 54,000	1.00	\$ 55,600	\$ 55,600
Interventionists	3.75	\$ 22,800	\$ 85,500	4.00	\$ 23,500	\$ 94,000	4.25	\$ 24,200	\$ 102,850	4.50	\$ 24,900	\$ 112,050	4.75	\$ 25,600	\$ 121,600
Substitute Teachers	1.80	\$ 23,900	\$ 43,020	2.00	\$ 24,600	\$ 49,200	2.20	\$ 25,300	\$ 55,660	2.40	\$ 26,100	\$ 62,640	2.40	\$ 26,900	\$ 64,560
Social Worker	1.00	\$ 59,500	\$ 59,500	1.00	\$ 61,300	\$ 61,300	1.00	\$ 63,100	\$ 63,100	1.00	\$ 65,000	\$ 65,000	1.00	\$ 67,000	\$ 67,000
Recess Aides	1.00	\$ 15,800	\$ 15,800	1.00	\$ 16,300	\$ 16,300	1.00	\$ 16,800	\$ 16,800	1.00	\$ 17,300	\$ 17,300	1.00	\$ 17,800	\$ 17,800
<b>Total Instructional Personnel:</b>	<b>36.675</b>		<b>\$ 1,593,460</b>	<b>42</b>		<b>\$ 1,877,063</b>	<b>47.325</b>		<b>\$ 2,174,535</b>	<b>52.15</b>		<b>\$ 2,448,553</b>	<b>52.4</b>		<b>\$ 2,527,185</b>
<b>Total Admin, Support and Instructional Personnel:</b>	<b>42.675</b>		<b>\$ 1,959,760</b>	<b>49</b>		<b>\$ 2,319,063</b>	<b>54.325</b>		<b>\$ 2,629,635</b>	<b>59.15</b>		<b>\$ 2,917,352.50</b>	<b>59.4</b>		<b>\$ 3,010,085</b>

Benefits	Year 1			Year 2			Year 3			Year 4			Year 5		
	Number of Staff	Cost Per	Total	Number of Staff	Cost Per	Total	Number of Staff	Cost Per	Total	Number of Staff	Cost Per	Total	Number of Staff	Cost Per	Total
<b>Administrative &amp; Support Benefits</b>															
Health Insurance	6.00	\$ 10,600	\$ 63,600	7.00	\$ 10,800	\$ 75,600	7.00	\$ 11,025	\$ 77,175	7.00	\$ 11,250	\$ 78,750	7.00	\$ 11,475	\$ 80,325
Retirement Plan--NC State			\$ -			\$ -			\$ -			\$ -			\$ -
Retirement Plan--Other	6.00	\$ 1,405	\$ 8,430	7.00	\$ 1,445	\$ 10,115	7.00	\$ 1,480	\$ 10,360	7.00	\$ 1,510	\$ 10,570	7.00	\$ 1,550	\$ 10,850
Life Insurance			\$ -			\$ -			\$ -			\$ -			\$ -
Disability			\$ -			\$ -			\$ -			\$ -			\$ -
Medicare	6.00	\$ 605	\$ 3,630	7.00	\$ 625	\$ 4,375	7.00	\$ 640	\$ 4,480	7.00	\$ 650	\$ 4,550	7.00	\$ 670	\$ 4,690
Social Security	6.00	\$ 2,600	\$ 15,600	7.00	\$ 2,685	\$ 18,795	7.00	\$ 2,745	\$ 19,215	7.00	\$ 2,785	\$ 19,495	7.00	\$ 2,860	\$ 20,020
Dental Insurance	6.00	\$ 800	\$ 4,800	7.00	\$ 825	\$ 5,775	7.00	\$ 850	\$ 5,950	7.00	\$ 875	\$ 6,125	7.00	\$ 900	\$ 6,300
Life and Disability Insurance	6.00	\$ 45	\$ 270	7.00	\$ 50	\$ 350	7.00	\$ 50	\$ 350	7.00	\$ 50	\$ 350	7.00	\$ 50	\$ 350
Workers' Compensation	6.00	\$ 140	\$ 840	7.00	\$ 145	\$ 1,015	7.00	\$ 150	\$ 1,050	7.00	\$ 150	\$ 1,050	7.00	\$ 155	\$ 1,085
FUTA & SUTA	6.00	\$ 250	\$ 1,500	7.00	\$ 260	\$ 1,820	7.00	\$ 265	\$ 1,855	7.00	\$ 275	\$ 1,925	7.00	\$ 275	\$ 1,925
Other	6.00	\$ 250	\$ 1,500	7.00	\$ 280	\$ 1,960	7.00	\$ 285	\$ 1,995	7.00	\$ 285	\$ 1,995	7.00	\$ 295	\$ 2,065
<b>Total Admin and Support Benefits:</b>			<b>\$ 100,170</b>			<b>\$ 119,805</b>			<b>\$ 122,430</b>			<b>\$ 124,810</b>			<b>\$ 127,610</b>
<b>Instructional Personnel Benefits</b>															
Health Insurance	34.88	\$ 10,600	\$ 369,675	40.00	\$ 10,800	\$ 432,000	45.13	\$ 11,025	\$ 497,503	49.75	\$ 11,250	\$ 559,688	50.00	\$ 11,475	\$ 573,750
Retirement Plan--NC State			\$ -			\$ -			\$ -			\$ -			\$ -
Retirement Plan--Other	34.88	\$ 1,405	\$ 48,999	40.00	\$ 1,445	\$ 57,800	45.13	\$ 1,480	\$ 66,785	49.75	\$ 1,510	\$ 75,123	50.00	\$ 1,550	\$ 77,500
Social Security	36.68	\$ 2,600	\$ 95,355	42.00	\$ 2,685	\$ 112,770	47.33	\$ 2,745	\$ 129,907	52.15	\$ 2,785	\$ 145,238	52.40	\$ 2,860	\$ 149,864
Disability			\$ -			\$ -			\$ -			\$ -			\$ -
Medicare	36.68	\$ 605	\$ 22,188	42.00	\$ 625	\$ 26,250	47.33	\$ 640	\$ 30,288	52.15	\$ 650	\$ 33,898	52.40	\$ 670	\$ 35,108
Life Insurance			\$ -			\$ -			\$ -			\$ -			\$ -
Dental Insurance	34.88	\$ 800	\$ 27,900	40.00	\$ 825	\$ 33,000	45.13	\$ 850	\$ 38,356	49.75	\$ 875	\$ 43,531	50.00	\$ 900	\$ 45,000
Life and Disability Insurance	34.88	\$ 45	\$ 1,569	40.00	\$ 50	\$ 2,000	45.13	\$ 50	\$ 2,256	49.75	\$ 50	\$ 2,488	50.00	\$ 50	\$ 2,500
Workers' Compensation	34.88	\$ 140	\$ 4,883	40.00	\$ 145	\$ 5,800	45.13	\$ 150	\$ 6,769	49.75	\$ 150	\$ 7,463	50.00	\$ 155	\$ 7,750
FUTA & SUTA	36.68	\$ 250	\$ 9,169	42.00	\$ 260	\$ 10,920	47.33	\$ 265	\$ 12,541	52.15	\$ 275	\$ 14,341	52.40	\$ 275	\$ 14,410
Other	34.88	\$ 250	\$ 8,719	40.00	\$ 280	\$ 11,200	45.13	\$ 285	\$ 12,861	49.75	\$ 285	\$ 14,179	50.00	\$ 295	\$ 14,750
<b>Total Instructional Personnel Benefits:</b>			<b>\$ 588,457</b>			<b>\$ 691,740</b>			<b>\$ 797,266</b>			<b>\$ 895,947</b>			<b>\$ 920,632</b>
<b>Total Personnel Benefits:</b>			<b>\$ 688,627</b>			<b>\$ 811,545</b>			<b>\$ 919,696</b>			<b>\$ 1,020,757</b>			<b>\$ 1,048,242</b>
<b>Total Admin &amp; Support Personnel (Salary &amp; Benefits):</b>	<b>6</b>		<b>\$ 466,470</b>	<b>7</b>		<b>\$ 561,805</b>	<b>7</b>		<b>\$ 577,530</b>	<b>7</b>		<b>\$ 593,610.00</b>	<b>7</b>		<b>\$ 610,510</b>
<b>Total Instructional Personnel (Salary &amp; Benefits):</b>	<b>36.675</b>		<b>\$ 2,181,917</b>	<b>42</b>		<b>\$ 2,568,803</b>	<b>47.325</b>		<b>\$ 2,971,801</b>	<b>52.15</b>		<b>\$ 3,344,499</b>	<b>52.4</b>		<b>\$ 3,447,817</b>
<b>TOTAL PERSONNEL:</b>	<b>42.675</b>		<b>\$ 2,648,387</b>	<b>49</b>		<b>\$ 3,130,608</b>	<b>54.325</b>		<b>\$ 3,549,331</b>	<b>59.15</b>		<b>\$ 3,938,109</b>	<b>59.4</b>		<b>\$ 4,058,327</b>

\*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
<b>Office</b>			
Office Supplies	\$ 24,600.00	\$ 14,600.00	\$ 16,100.00
Paper			
Computers & Software	\$ 750.00	\$ 750.00	\$ 750.00
Communications & Telephone	\$ 2,750.00	\$ 2,750.00	\$ 2,750.00
Copier leases			
Other	\$ 800.00	\$ 830.00	\$ 850.00
Office Equipment	\$ 30,890.00	\$ 32,810.00	\$ 34,730.00
<b>Management Company</b>			
Contract Fees			
Other			
*** Insert rows and edit text as needed. ***			
<b>Professional Contract</b>			
Legal Counsel	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00
Student Accounting			
Financial	\$ 75,010.00	\$ 74,840.00	\$ 74,760.00
Other			
*** Insert rows and edit text as needed. ***			
<b>Facilities</b>			
Facility Lease/Mortgage	\$ 1,100,000.00	\$ 1,100,000.00	\$ 1,100,000.00
Maintenance	\$ 115,390.00	\$ 122,130.00	\$ 84,250.00
Custodial Supplies			
Custodial Contract	\$ 118,500.00	\$ 140,500.00	\$ 164,500.00
Insurance (pg19)	\$ 22,950.00	\$ 23,830.00	\$ 24,650.00
Other	\$ 17,300.00	\$ 2,380.00	\$ 2,450.00
Rent of Equipment	\$ 15,970.00	\$ 17,770.00	\$ 19,560.00
<b>Utilities</b>			
Electric	\$ 50,860.00	\$ 52,550.00	\$ 54,250.00
Gas	\$ 4,240.00	\$ 4,240.00	\$ 4,240.00
Water/Sewer	\$ 7,500.00	\$ 7,730.00	\$ 7,950.00
Trash	\$ 5,700.00	\$ 6,600.00	\$ 7,500.00
Other	\$ 4,000.00	\$ 4,130.00	\$ 4,250.00

\*\*\* Insert rows and edit text as needed. \*\*\*


Transportation

Buses

Gas

Oil/Tires & Maintenance

Other

\$ 10,000.00	\$ 10,000.00	\$ 10,000.00

\*\*\* Insert rows and edit text as needed. \*\*\*

Other

Marketing

Child nutrition

Travel

Other

Administrative Support

Facilities Acquisition

Partner Relations

Board Expenditures

\$ 144,560.00	\$ 146,750.00	\$ 148,640.00
\$ 209,190.00	\$ 245,360.00	\$ 283,130.00
\$ 13,900.00	\$ 14,930.00	\$ 16,020.00
\$ 7,500.00	\$ 7,720.00	\$ 7,950.00
\$ 96,690.00	\$ 96,030.00	\$ 95,510.00
\$ 24,700.00	\$ 27,800.00	\$ 4,910.00
\$ 62,960.00	\$ 62,510.00	\$ 62,150.00
\$ 35,000.00	\$ 35,000.00	\$ 35,000.00

**Total Administrative & Support Operations:**

\$ 2,211,710.00	\$ 2,264,540.00	\$ 2,276,850.00
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<b>OPERATIONS BUDGET:</b>			
<b>Instructional</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
<b>Classroom Technology</b>			
Software	\$ 1,900.00	\$ 1,960.00	\$ 2,010.00
Other			
Technology Services	\$ 165,000.00	\$ 175,500.00	\$ 186,000.00
<b>Instructional Contract</b>			
Staff Development	\$ 92,870.00	\$ 83,050.00	\$ 80,690.00
Staff Recruitment and Retention	\$ 78,150.00	\$ 90,050.00	\$ 101,770.00
Special Education Services	\$ 158,210.00	\$ 195,600.00	\$ 224,020.00
Curriculum Development & Intervention Svcs	\$ 58,490.00	\$ 67,180.00	\$ 75,690.00
<b>Books and Supplies</b>			
Instructional Materials	\$ 149,740.00	\$ 124,250.00	\$ 134,850.00
Curriculum/Texts	\$ 86,620.00	\$ 65,920.00	\$ 70,985.00
Copy Paper	\$ 21,850.00	\$ 25,480.00	\$ 29,290.00
Testing Supplies	\$ 37,840.00	\$ 39,590.00	\$ 41,380.00
Instructional Equipment	\$ 135,180.00	\$ 149,980.00	\$ 164,780.00
Field Trips	\$ 2,880.00	\$ 3,380.00	\$ 3,920.00
<b>Total Instructional Operations:</b>	<b>\$ 988,730.00</b>	<b>\$ 1,021,940.00</b>	<b>\$ 1,115,385.00</b>
<b>TOTAL OPERATIONS:</b>			
	<b>\$ 3,200,440.00</b>	<b>\$ 3,286,480.00</b>	<b>\$ 3,392,235.00</b>

*\*Applicants may amend this table and the position titles to fit their Education and Operations Plans.*

Year 4	Year 5
\$ 17,600.00	\$ 17,600.00
\$ 750.00	\$ 750.00
\$ 2,750.00	\$ 2,750.00
\$ 880.00	\$ 900.00
\$ 36,660.00	\$ 37,190.00
\$ 10,000.00	\$ 10,000.00
\$ 110,840.00	\$ 94,940.00
\$ 1,100,000.00	\$ 1,100,000.00
\$ 91,850.00	\$ 91,720.00
\$ 189,500.00	\$ 195,500.00
\$ 25,500.00	\$ 26,220.00
\$ 2,530.00	\$ 2,600.00
\$ 21,350.00	\$ 21,350.00
\$ 55,940.00	\$ 57,640.00
\$ 4,240.00	\$ 4,240.00
\$ 8,200.00	\$ 8,450.00
\$ 8,400.00	\$ 8,400.00
\$ 4,380.00	\$ 4,500.00

\$ 10,000.00	\$ 10,000.00
\$ 194,170.00	\$ 174,630.00
\$ 322,520.00	\$ 330,050.00
\$ 17,140.00	\$ 17,590.00
\$ 8,170.00	\$ 8,430.00
\$ 148,650.00	\$ 124,610.00
\$ 7,640.00	\$ 6,410.00
\$ 96,700.00	\$ 81,030.00
\$ 35,000.00	\$ 35,000.00
<b>\$ 2,531,360.00</b>	<b>\$ 2,472,500.00</b>

Year 4		Year 5	
\$	2,080.00	\$	2,140.00
\$	196,500.00	\$	195,320.00
\$	97,030.00	\$	91,680.00
\$	171,850.00	\$	145,580.00
\$	232,360.00	\$	238,580.00
\$	131,560.00	\$	109,980.00
\$	145,740.00	\$	145,610.00
\$	77,372.00	\$	79,347.00
\$	33,280.00	\$	34,240.00
\$	58,090.00	\$	51,400.00
\$	179,590.00	\$	179,590.00
\$	4,480.00	\$	4,640.00
<b>\$</b>	<b>1,329,932.00</b>	<b>\$</b>	<b>1,278,107.00</b>

<b>\$</b>	<b>3,861,292.00</b>	<b>\$</b>	<b>3,750,607.00</b>
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## Overall Budget

SUMMARY	Logic	Year 1	Year 2	Year 3	Year 4	Year 5
Total Personnel	J	\$ 2,648,387.13	\$ 3,130,607.50	\$ 3,549,331.25	\$ 3,938,109.00	\$ 4,058,327.00
Total Operations	M	\$ 3,200,440.00	\$ 3,286,480.00	\$ 3,392,235.00	\$ 3,861,292.00	\$ 3,750,607.00
Total Expenditures	N = J + M	\$ 5,848,827.13	\$ 6,417,087.50	\$ 6,941,566.25	\$ 7,799,401.00	\$ 7,808,934.00
Total Revenue	Z	\$ 5,848,827.13	\$ 6,417,087.50	\$ 6,941,566.25	\$ 7,799,401.00	\$ 7,808,934.00
Surplus / (Deficit)	= Z - N	\$ -	\$ -	\$ -	\$ -	\$ -

Anticipated Racial/Ethnic Demographics (%)	% of Economically Disadvantaged Students	% of Students with Disabilities	% of English Language Learners
<b>White:</b> 28.2% <b>Hispanic:</b> 17.8% <b>African American:</b> 41.9% <b>Two or More Races:</b> 4.8% <b>Asian:</b> 6.8% <b>American Indian:</b> 0.3% <b>Pacific Islander:</b> 0.2%	<b>Guilford County Schools:</b> 47.9%	<b>Guilford County Schools:</b> 13.4%	<b>Guilford County Schools:</b> 10.1%



# Appendix O: Additional Appendices Provided by Applicant

## High Point Preparatory Academy



## National Heritage Academies in North Carolina

**Overview:** National Heritage Academies (NHA) is a leading charter school operator committed to educating more children and challenging each child to succeed. Its fifteen North Carolina partner schools – Forsyth Academy in Winston-Salem, Greensboro Academy in Greensboro, PreEminent Charter School in Raleigh, Queen’s Grant in Mint Hill, Research Triangle Charter Academy in Durham, Summerfield Charter Academy in Summerfield, Wake Forest Charter Academy in Wake Forest, Winterville Charter Academy in Winterville, Gate City Charter Academy in Greensboro, Matthews Charter Academy in Matthews, Peak Charter Academy in Apex, Johnston Charter Academy in Clayton, Rolesville Charter Academy in Rolesville, Summit Creek Academy in Browns Summit, and Phoenix Academy in High Point – all serve urban or suburban communities and meet the unique needs of each community. With independent local boards as partners, NHA is making steady progress bringing the sustained academic improvement these communities seek and deserve.

NHA's 2021-22 National Profile	
Number of schools	99
Total enrollment	65,791
% minority students	77%
% eligible for free/reduced price lunch	67%
# of students on wait lists	13,960
Total employment	5,688

NHA's 2021-22 North Carolina Profile	
Number of schools	15
Total enrollment	11,065
% minority students	63%
% eligible for free/reduced price lunch	43%
# of students on wait lists	11,383
Total employment	753

**Academics:** Nationally, and in North Carolina, NHA-partner schools deliver consistently better academic results than neighboring district schools at much lower taxpayer costs. This record is driven by NHA’s commitment to a durable learning culture built on four pillars:

- ***Academic excellence:*** The curriculum includes all core subjects along with art, music, library, and physical education classes. School culture emphasizes college readiness from the earliest grades.
- ***Character development:*** Schools infuse coursework with lessons on such virtues as compassion, respect, and integrity so students build *moral, intellectual, performance, and social* character.
- ***Parental partnership:*** Schools work to involve parents in school activities and offer a designated "parent room" where parents can meet, collaborate, and support learning.
- ***Student responsibility:*** Students must meet high standards. They commit to hard work, work with teachers to set unique learning goals, and learn over time that effort creates ability.

**Commitment to schools:** NHA covers *all* start-up costs of designing, building, and/or renovating a school tailored for NHA's academic model. It also covers costs of launching the academic program, and it often contributes its own funds for supplemental instruction. Under this model, which relieves boards of a burden that crushes many charter school projects, NHA leases the building to partner boards in predictable commercial leases. The leases, which are negotiated with boards, impose no automatic rent increases and reflect appropriate value of these one-purpose buildings.

### Academic Overview of NHA-Partner Schools in North Carolina

Below is 2018-19 academic information for NHA-partner schools in North Carolina. Eleven schools met or exceeded growth and eleven schools earned a 'C' or above on the state's accountability system.

NHA School	% Minority	2018-19 % Free or Red. Lunch		2018-19 Growth Status	2018-19 Letter Grade	2018-19 Reading Proficiency		2018-19 Math Proficiency	
		Sch.	Dist.			Sch.	Dist.	Sch.	Dist.
Forsyth	91%	82%	60%	Not Met	D	47%	55%	45%	54%
Gate City	95%	70%	62%	Met	D	42%	56%	44%	54%
Greensboro	32%	7%	62%	Exceeded	A	86%	56%	92%	52%
Johnston	37%	24%	46%	Met	C	60%	51%	62%	53%
Matthews	48%	35%	58%	Met	C	61%	54%	61%	64%
Peak	45%	8%	33%	Exceeded	A	84%	65%	80%	65%
PreEminent	99%	77%	33%	Exceeded	C	50%	65%	50%	65%
Queen's Grant	41%	26%	58%	Exceeded	B	67%	54%	69%	64%
Research Triangle	96%	66%	60%	Exceeded	C	51%	48%	49%	47%
Rolesville	31%	24%	33%	Not Met	C	65%	64%	65%	67%
Summerfield	32%	14%	62%	Exceeded	A	83%	56%	87%	52%
Wake Forest	29%	10%	33%	Exceeded	B	76%	65%	81%	65%
Winterville	68%	55%	63%	Exceeded	C	64%	55%	54%	58%

In most instances, NHA-partner schools demonstrate higher proficiency rates than the school district in which they are located. When compared to a composite of nearby district schools, which are more likely to enroll students with comparable academic needs, seven out of ten NHA-partner schools perform at or above their composite districts.

	FRL % (2018-19)	Reading Proficiency (2018-19)	Math Proficiency (2018-19)
<b>Forsyth</b>	82%	47%	45%
5 Closest Schools	58%	38%	41%
<b>Gate City</b>	70%	42%	44%
5 Closest Schools	79%	36%	34%
<b>Greensboro</b>	7%	86%	92%
5 Closest Schools	24%	73%	72%
<b>Johnston</b>	23%	60%	62%
5 Closest Schools	37%	51%	53%
<b>Matthews</b>	35%	61%	61%
5 Closest Schools	31%	68%	76%
<b>Peak</b>	8%	84%	80%
5 Closest Schools	19%	74%	77%
<b>PreEminent</b>	77%	50%	50%
5 Closest Schools	66%	42%	44%
<b>Queen's Grant</b>	26%	67%	69%
5 Closest Schools	38%	61%	69%
<b>Research Triangle</b>	66%	51%	49%
5 Closest Schools	39%	48%	35%
<b>Summerfield</b>	14%	83%	87%
5 Closest Schools	15%	81%	81%
<b>Wake Forest</b>	10%	76%	81%
5 Closest Schools	11%	79%	83%
<b>Winterville</b>	54%	64%	54%
5 Closest Schools	53%	62%	63%

## Academic Performance of NHA-Partner Schools

National Heritage Academies (NHA)-partner school students receive the equivalent of three-and-a-half months of extra learning every year compared with their traditional public school peers. Students at NHA-partner schools experience about 80 days of additional learning in math and 63 days in reading for a composite score of 71 days of extra education, according to the report by Stanford's Center for Research on Education Outcomes, or CREDO. Overall, NHA was among the top 20 percent of schools surveyed, ranking in the 84th percentile and outperforming more than four-fifths of the other charter school systems studied (CREDO, 2017). <https://credo.stanford.edu/pdfs/CMO%20FINAL.pdf>

State	School	Address	City, State, Zip	Geographic District	Authorizer	Opening Year	Grades Served	NHA-Partner School 18-19 ELA Proficiency	Geographic District 18-19 ELA Proficiency	NHA-Partner School 18-19 Math Proficiency	Geographic District 18-19 Math Proficiency
MI	Excel Charter Academy	4201 Breton Ave SE	Grand Rapids, MI 49512-3857	Kentwood Public Schools	Grand Valley State University	1995	K - 8	67%	49%	59%	38%
MI	Vanderbilt Charter Academy	301 West 16th St	Holland, MI 49423-3329	Holland City School District	Grand Valley State University	1996	K - 8	55%	44%	52%	32%
MI	Vanguard Charter Academy	1620 - 52nd St SW	Wyoming, MI 49519-9629	Wyoming Public Schools	Grand Valley State University	1996	K - 8	62%	35%	62%	24%
MI	Vista Charter Academy	711 - 32nd St SE	Grand Rapids, MI 49548-2307	Godwin Heights Public Schools	Bay Mills Community College	1996	K - 8	40%	28%	31%	19%
MI	Cross Creek Charter Academy	7701 Kalamazoo Ave SE	Byron Center, MI 49315-9534	Caledonia Community Schools	Central Michigan University	1997	K - 8	76%	49%	68%	38%
MI	Eagle Crest Charter Academy	11950 Riley St	Holland, MI 49424-8553	West Ottawa Public School District	Central Michigan University	1997	K - 8	68%	56%	64%	42%
MI	Knapp Charter Academy	1759 Leffingwell Ave NE	Grand Rapids, MI 49525-4531	Forest Hills Public Schools	Grand Valley State University	1997	K - 8	41%	28%	35%	19%
MI	Walker Charter Academy	1801 Three Mile Rd NW	Walker, MI 49544-1445	Kenowa Hills Public Schools	Grand Valley State University	1997	K - 8	64%	50%	63%	33%
MI	Endeavor Charter Academy	380 N. Helmer Rd	Springfield, MI 49037-7776	Battle Creek Public Schools	Grand Valley State University	1998	K - 8	31%	17%	23%	9%
MI	Paragon Charter Academy	3750 McCain Rd	Jackson, MI 49201-7675	Jackson Public Schools	Grand Valley State University	1998	K - 8	51%	27%	39%	19%
MI	Paramount Charter Academy	3624 S. Westnedge Ave	Kalamazoo, MI 49008-2969	Kalamazoo Public School District	Bay Mills Community College	1998	K - 8	30%	38%	17%	31%
MI	Ridge Park Charter Academy	4120 Camelot Ridge Dr SE	Grand Rapids, MI 49546-2432	Forest Hills Public Schools	Lake Superior State University	1998	K - 8	44%	28%	38%	19%
MI	Timberland Charter Academy	2574 McLaughlin Ave	Muskegon, MI 49442-4439	Orchard View Schools	Grand Valley State University	1998	K - 8	23%	19%	17%	13%
MI	Burton Glen Charter Academy	4171 Atherton Rd	Burton, MI 48519-1435	Atherton Community Schools	Northern Michigan University	1999	K - 8	18%	10%	13%	5%
MI	Chandler Woods Charter Academy	6895 Samrick Ave Private	Belmont, MI 49306-8844	Comstock Park Public Schools	Grand Valley State University	1999	K - 8	72%	64%	75%	65%
NC	Forsyth Academy	5426 Shattalon Dr	Winston-Salem, NC 27106-1919	Forsyth County Schools	North Carolina State Board of Education	1999	K - 8	47%	55%	45%	54%
NC	Greensboro Academy	4049 Battleground Ave	Greensboro, NC 27410-8410	Guilford County Schools	North Carolina State Board of Education	1999	K - 8	86%	56%	92%	52%
MI	Linden Charter Academy	3244 N Linden Rd	Flint, MI 48504-1753	Westwood Heights Schools	Central Michigan University	1999	K - 8	35%	10%	17%	5%
MI	North Saginaw Charter Academy	2332 Trautner Dr	Saginaw, MI 48604-9593	Saginaw City School District	Central Michigan University	1999	K - 8	25%	30%	12%	23%
MI	South Arbor Charter Academy	8200 Carpenter Rd	Ypsilanti, MI 48197-9173	Milan Area Schools	Central Michigan University	1999	K - 8	75%	69%	71%	65%
MI	Walton Charter Academy	744 East Walton Blvd	Pontiac, MI 48340-1361	Pontiac City School District	Northern Michigan University	1999	K - 8	29%	15%	25%	10%
MI	Windemere Park Charter Academy	3100 W. Saginaw Street	Lansing, MI 48917-2307	Waverly Community Schools	Grand Valley State University	1999	K - 8	43%	21%	35%	13%
MI	Canton Charter Academy	49100 Ford Rd	Canton, MI 48187-5415	Plymouth-Canton Community Schools	Central Michigan University	2000	K - 8	69%	65%	69%	63%
MI	Metro Charter Academy	34800 Ecorse Rd	Romulus, MI 48174-1642	Romulus Community Schools	Grand Valley State University	2000	K - 8	43%	30%	37%	25%
NC	PreEminent Charter School	3815 Rock Quarry Rd	Raleigh, NC 27610-5123	Wake County Schools	North Carolina State Board of Education	2000	K - 8	50%	65%	50%	65%
NC	Research Triangle Charter Academy	2418 Ellis Rd	Durham, NC 27703-5543	Durham Public Schools	North Carolina State Board of Education	2000	K - 8	51%	48%	49%	47%
MI	Warrendale Charter Academy	19400 Sawyer Rd	Detroit, MI 48228-3330	Detroit Public Schools Community District	Grand Valley State University	2001	K - 8	31%	14%	23%	10%
MI	Detroit Merit Charter Academy	1091 Alter Rd	Detroit, MI 48215-2861	Detroit Public Schools Community District	Grand Valley State University	2002	K - 8	39%	14%	25%	10%
OH	North Dayton School of Discovery	3901 Turner Rd	Dayton, OH 45415-3654	Dayton City	Educational Service Center of Lake Erie West	2002	K - 8	33%	34%	29%	26%
NC	Queen's Grant Community School	6400 Matthews-Mint Hill Rd	Mint Hill, NC 28227-9323	Mecklenburg County	North Carolina State Board of Education	2002	K - 8	67%	54%	69%	64%
NY	Southside Academy Charter School	2200 Onondaga Creek Blvd	Syracuse, NY 13207-2361	Syracuse City School District	New York State Education Department	2002	K - 8	31%	18%	25%	15%
IN	Andrew J. Brown Academy	3600 N. German Church Rd	Indianapolis, IN 46235-8504	Indianapolis Public Schools	Indianapolis Mayor's Office	2003	K - 8	23%	22%	28%	21%
NY	Brooklyn Excelsior Charter School	856 Quincy St	Brooklyn, NY 11221-3612	NYC Geog. District 16	SUNY Charter Schools Institute	2003	K - 8	54%	35%	54%	32%
NY	Buffalo United Charter School	325 Manhattan Ave	Buffalo, NY 14214-1809	Buffalo City School District	SUNY Charter Schools Institute	2003	K - 8	24%	25%	26%	21%
MI	Hamtramck Academy	11420 Conant St	Hamtramck, MI 48212-3134	Hamtramck Public Schools	Bay Mills Community College	2003	K - 8	52%	22%	52%	20%
MI	Keystone Academy	47925 Bemis Rd	Belleville, MI 48111-9760	Van Buren Public Schools	Bay Mills Community College	2003	K - 8	57%	33%	52%	28%
OH	Pathway School of Discovery	173 Avondale Dr	Dayton, OH 45404-2123	Dayton City	Educational Service Center of Lake Erie West	2003	K - 8	50%	34%	38%	26%
OH	Alliance Academy of Cincinnati	1712 Duck Creek Rd	Cincinnati, OH 45207-1644	Cincinnati City	Educational Service Center of Lake Erie West	2004	K - 8	48%	52%	36%	46%
OH	Apex Academy	16005 Terrace Rd	East Cleveland, OH 44112-2001	East Cleveland City School District	Educational Service Center of Lake Erie West	2004	K - 8	53%	32%	56%	25%
MI	Detroit Enterprise Academy	11224 Kercheval St	Detroit, MI 48214-3323	Detroit Public Schools Community District	Grand Valley State University	2004	K - 8	36%	14%	23%	10%
MI	Detroit Premier Academy	7781 Asbury Park	Detroit, MI 48228-3685	Detroit Public Schools Community District	Grand Valley State University	2004	K - 8	30%	14%	18%	10%
OH	Emerson Academy of Dayton	501 Hickory St	Dayton, OH 45410-1232	Dayton City	Educational Service Center of Lake Erie West	2004	K - 8	46%	34%	38%	26%
MI	Fortis Academy	3875 Golfside Dr	Ypsilanti, MI 48197-3726	Ypsilanti Community Schools	Bay Mills Community College	2004	K - 8	47%	20%	33%	19%
MI	Great Oaks Academy	4257 Bart St	Warren, MI 48091-1977	Warren Consolidated Schools	Bay Mills Community College	2004	K - 8	38%	14%	32%	10%
MI	Laurus Academy	24590 Lahser Rd	Southfield, MI 48034-6040	Southfield Public School District	Bay Mills Community College	2004	K - 8	41%	35%	27%	20%
OH	Orion Academy	1798 Queen City Ave	Cincinnati, OH 45214-1427	Cincinnati City	Educational Service Center of Lake Erie West	2004	K - 8	28%	52%	21%	46%
OH	Pinnacle Academy	860 E. 222nd St	Cleveland, OH 44123-3317	Euclid City	Educational Service Center of Lake Erie West	2004	K - 8	42%	42%	46%	35%
MI	Prevail Academy	353 Cass Ave	Mount Clemens, MI 48043-2112	Mt. Clemens Community School District	Bay Mills Community College	2004	K - 8	40%	13%	32%	11%
MI	Triumph Academy	3000 Vivian Rd	Monroe, MI 48162-8600	Jefferson Schools	Bay Mills Community College	2004	K - 8	51%	33%	44%	20%
OH	Winterfield Venture Academy	305 Wenz Rd	Toledo, OH 43615-6244	Toledo City	Educational Service Center of Lake Erie West	2004	K - 8	53%	37%	44%	33%
OH	Bennett Venture Academy	5130 Bennett Rd	Toledo, OH 43612-3422	Toledo City	Buckeye Community Hope Foundation	2005	K - 8	42%	37%	43%	33%

## Academic Performance of NHA-Partner Schools

National Heritage Academies (NHA)-partner school students receive the equivalent of three-and-a-half months of extra learning every year compared with their traditional public school peers. Students at NHA-partner schools experience about 80 days of additional learning in math and 63 days in reading for a composite score of 71 days of extra education, according to the report by Stanford's Center for Research on Education Outcomes, or CREDO. Overall, NHA was among the top 20 percent of schools surveyed, ranking in the 84th percentile and outperforming more than four-fifths of the other charter school systems studied (CREDO, 2017). <https://credo.stanford.edu/pdfs/CMO%20FINAL.pdf>

State	School	Address	City, State, Zip	Geographic District	Authorizer	Opening Year	Grades Served	NHA-Partner School 18-19 ELA Proficiency	Geographic District 18-19 ELA Proficiency	NHA-Partner School 18-19 Math Proficiency	Geographic District 18-19 Math Proficiency
OH	Stambaugh Charter Academy	2420 Donald Ave	Youngstown, OH 44509-1306	Youngstown City Schools	Buckeye Community Hope Foundation	2006	K - 8	53%	27%	67%	24%
MI	Taylor Exemplar Academy	26727 Goddard Rd	Taylor, MI 48180-3912	Taylor School District	Bay Mills Community College	2006	K - 8	41%	28%	36%	20%
MI	Flagship Academy	13661 Wisconsin St	Detroit, MI 48238-2356	Detroit Public Schools Community District	Central Michigan University	2007	K - 8	23%	14%	14%	10%
CO	Landmark Academy at Reunion	10566 Memphis St	Commerce City, CO 80022-6236	Brighton 27J	Brighton School District SD 27J	2007	K - 8	50%	38%	45%	28%
IN	Aspire Charter Academy	4900 W. 15th Ave	Gary, IN 46406-2308	Gary Community School Corp	Ball State University	2008	K - 8	35%	16%	25%	12%
MI	Grand River Preparatory High School	650 52nd St SE	Kentwood, MI 49548	Kelloggsville Public Schools	Grand Valley State University	2008	9-12	46%	24%	24%	13%
MI	Reach Charter Academy	25275 Chippendale St	Roseville, MI 48066-3960	Roseville Community Schools	Grand Valley State University	2008	K - 8	36%	18%	26%	12%
MI	Achieve Charter Academy	3250 Denton Rd	Canton, MI 48188-2110	Van Buren Public Schools	Grand Valley State University	2009	K - 8	75%	65%	73%	63%
NY	Brooklyn Scholars Charter School	2635 Linden Blvd	Brooklyn, NY 11208-4907	NYC Geog. District 19	New York City Department of Education	2009	K - 8	54%	31%	47%	28%
MI	Lansing Charter Academy	3300 Express Ct	Lansing, MI 48910-4370	Lansing Public School District	Bay Mills Community College	2009	K - 8	27%	21%	24%	13%
MI	Quest Charter Academy	24745 Van Born Rd	Taylor, MI 48180-1221	Taylor School District	Central Michigan University	2009	K - 8	46%	28%	38%	20%
GA	Atlanta Heights Charter School	3712 Martin Luther King Jr Dr SW	Atlanta, GA 30331-3674	Atlanta Public Schools	Georgia Charter Schools Commission	2010	K - 8	21%	37%	23%	36%
NY	Brooklyn Dreams Charter School	259 Parkville Avenue	Brooklyn, NY 11230-1310	NYC Geog. District 22	SUNY Charter Schools Institute	2010	K - 8	46%	50%	40%	49%
CO	Foundations Academy	340 S 45th Avenue	Brighton, CO 80601-4652	Brighton 27J	Brighton School District SD 27J	2010	K - 8	50%	38%	43%	28%
LA	Inspire Charter Academy	5454 North Foster Drive	East Baton Rouge, LA 70805	East Baton Rouge Parish	East Baton Rouge Parish School Board	2010	K-8	23%	40%	23%	31%
MI	Legacy Charter Academy	4900 E Hildale Street	Detroit, MI 48234-2225	Detroit Public Schools Community District	Grand Valley State University	2010	K - 8	29%	14%	32%	10%
MI	Wellspring Preparatory High School	1031 Page St NE	Grand Rapids, MI 49505	Grand Rapids Public Schools	Bay Mills Community College	2010	9-12	54%	54%	39%	23%
NY	Riverton Street Charter School	118-34 Riverton Street	St. Albans, NY 11412-4024	NYC Geog. District 29	New York City Department of Education	2010	K - 8	54%	41%	53%	34%
MI	Arbor Preparatory High School	6800 Hitchingham Road	Ypsilanti, MI 48197	Ypsilanti Community Schools	Bay Mills Community College	2011	9-12	45%	18%	26%	5%
MI	East Arbor Charter Academy	6885 Merritt Road	Ypsilanti, MI 48197-8958	Ypsilanti Community Schools	Grand Valley State University	2011	K - 8	41%	34%	30%	24%
WI	Milwaukee Scholars Charter School	7000 West Florist Ave	Milwaukee, WI 53218-1855	Milwaukee Public Schools	University of Wisconsin-Milwaukee	2011	Y4 - 8	10%	19%	16%	16%
MI	Regent Park Scholars Charter Academy	15865 East 7 Mile	Detroit, MI 48205-2545	Detroit Public Schools Community District	Lake Superior State University	2011	K - 8	18%	14%	16%	10%
MI	South Canton Scholars Charter Academy	3085 S. Canton Center Rd	Canton, MI 48188-2452	Wayne-Westland Community School District	Grand Valley State University	2011	K - 8	73%	65%	67%	63%
MI	Plymouth Scholars Charter Academy	48484 N Territorial Road	Plymouth, MI 48170-2850	Plymouth-Canton Community Schools	Bay Mills Community College	2012	K - 8	80%	65%	74%	63%
MI	River City Scholars Charter Academy	944 Evergreen Street SE	Grand Rapids, MI 49507-2051	Grand Rapids Public Schools	Bay Mills Community College	2012	K - 8	21%	28%	12%	19%
MI	South Pointe Scholars Charter Academy	10550 Geddes Road	Ypsilanti, MI 48198-9442	Ypsilanti Community Schools	Northern Michigan University	2012	K - 8	51%	20%	39%	19%
MI	Oakside Scholars Charter Academy	355 Summit Dr	Waterford, MI 48328	Pontiac City School District	Bay Mills Community College	2013	K - 8	21%	15%	20%	11%
MI	Taylor Preparatory High School	9540 Telegraph Road	Taylor, MI 48180	Taylor School District	Grand Valley State University	2013	9-12	49%	38%	30%	16%
NC	Summerfield Charter Academy	5303 US 220 N	Summerfield, NC 27358	Guilford County Schools	North Carolina State Board of Education	2013	K - 8	83%	56%	87%	52%
LA	Advantage Charter Academy	14740 Plank Road	Baker, LA 70714	City of Baker School District	Board of Elementary and Secondary Education	2014	K-8	24%	18%	18%	11%
MI	Grand River Academy	28111 Eight Mile Road	Livonia, MI 48152	Clarenceville School District	Grand Valley State University	2014	K - 8	42%	57%	28%	50%
MI	Canton Preparatory High School	46610 Cherry Hill Road	Canton, MI 48187	Plymouth-Canton Community Schools	Grand Valley State University	2014	9-12	61%	75%	46%	67%
NC	Wake Forest Charter Academy	1851 Friendship Chapel Road	Wake Forest, NC 27587	Wake County Schools	North Carolina State Board of Education	2014	K - 8	76%	65%	81%	65%
LA	Willow Charter Academy	1818 Northeast Evangeline Thruway	Lafayette, LA 70501	Lafayette Parish	Board of Elementary and Secondary Education	2014	K - 8	18%	47%	14%	41%
NC	Winterville Charter Academy	4160 Bayswater Rd	Winterville, NC 28590	Pitt County Schools	North Carolina State Board of Education	2015	K - 8	64%	55%	54%	58%
NC	Gate City Charter Academy	123 Flemingfield Rd	Greensboro, NC 27405	Guilford County Schools	North Carolina State Board of Education	2016	K - 8	42%	56%	44%	54%
NC	Matthews Charter Academy	2332 Mt. Harmony Church Rd	Matthews, NC 28105	Charlotte-Mecklenburg Schools	North Carolina State Board of Education	2016	K - 8	61%	54%	61%	64%
NC	Peak Charter Academy	1601 Orchard Villas Ave	Apex, NC 27502	Wake County Schools	North Carolina State Board of Education	2017	K - 8	84%	65%	80%	65%
NC	Johnston Charter Academy	40 Scholar Dr	Clayton, NC 27520	Johnston County School District	North Carolina State Board of Education	2018	K - 8	60%	51%	62%	53%
NC	Rolesville Charter Academy	908 Eagle Scholars Dr	Rolesville, NC 27521	Wake County Schools	North Carolina State Board of Education	2018	K - 8	65%	64%	65%	67%
MI	Pembroke Academy	19940 Mansfield St	Detroit, MI 48235	Detroit Public Schools Community District	Central Michigan University	2018	K - 8	37%	13%	22%	12%
MI	Westfield Charter Academy	K-6: 27201 W. Chicago 7-12: 23750 Elmira St	Redford, MI 48239	South Redford School District	Grand Valley State University	2019	K - 12	N/A	N/A	N/A	N/A
CO	Mountain View Academy	Meadowbrook Pkwy	Colorado Springs, CO 80923	School District 49	School District 49	2020	K - 7	N/A	N/A	N/A	N/A
MI	Center Line Preparatory Academy	8155 Ritter St	Center Line, MI 48015	Center Line Public Schools	Central Michigan University	2020	K - 12	N/A	N/A	N/A	N/A
MI	PrepNet Virtual Academy	N/A	Statewide	Statewide	Grand Valley State University	2020	K-12	N/A	N/A	N/A	N/A
NC	Summit Creek Academy	2126 Scott Rd	Browns Summit, NC 27214	Guilford County Schools	North Carolina State Board of Education	2021	K-5	N/A	N/A	N/A	N/A

**Academic Performance of NHA-Partner Schools**

National Heritage Academies (NHA)-partner school students receive the equivalent of three-and-a-half months of extra learning every year compared with their traditional public school peers. Students at NHA-partner schools experience about 80 days of additional learning in math and 63 days in reading for a composite score of 71 days of extra education, according to the report by Stanford's Center for Research on Education Outcomes, or CREDO. Overall, NHA was among the top 20 percent of schools surveyed, ranking in the 84th percentile and outperforming more than four-fifths of the other charter school systems studied (CREDO, 2017). <https://credo.stanford.edu/pdfs/CMO%20FINAL.pdf>

State	School	Address	City, State, Zip	Geographic District	Authorizer	Opening Year	Grades Served	NHA-Partner School 18-19 ELA Proficiency	Geographic District 18-19 ELA Proficiency	NHA-Partner School 18-19 Math Proficiency	Geographic District 18-19 Math Proficiency
NC	Phoenix Academy	K-2: 4020 Meeting Way 3-6: 4191 Mendenhall Oaks Parkway 7-10: 7847 Clinard Farms Road	High Point, NC 27265	Guilford County Schools	North Carolina State Board of Education	Opened: 1997 NHA Partnership Began in 2022	K-10	N/A	N/A	N/A	N/A

Since 1995, all NHA-partner schools have successfully applied for and been granted renewal of their charters on all but one occasion. Rochester Leadership Academy Charter School in Rochester, New York in 2005 due to not meeting its charter goals.

The local district for the schools below do not have proficiency counts available by grade, so the comparisons below are by grade-level.

State	School	Address	City, State, Zip	Geographic District	Authorizer	Opening Year	Grades Served	NHA-Partner School 18-19 ELA Proficiency	Geographic District 18-19 ELA Proficiency	NHA-Partner School 18-19 Math Proficiency	Geographic District 18-19 Math Proficiency
LA	Inspire Charter Academy (Grade 3)	5454 North Foster Drive	East Baton Rouge, LA 70805-3031	East Baton Rouge Parish	East Baton Rouge Parish School Board	2010	K - 8	21%	42%	33%	39%
	Inspire Charter Academy (Grade 4)							25%	40%	22%	33%
	Inspire Charter Academy (Grade 5)							14%	37%	10%	30%
	Inspire Charter Academy (Grade 6)							17%	35%	18%	27%
	Inspire Charter Academy (Grade 7)							13%	43%	16%	22%
LA	Inspire Charter Academy (Grade 8)	14740 Plank Road	Baker, LA 70714	City of Baker School District	Board of Elementary and Secondary Education	2014	K - 8	49%	42%	40%	33%
	Advantage Charter Academy (Grade 3)							36%	14%	27%	10%
	Advantage Charter Academy (Grade 4)							30%	11%	22%	14%
	Advantage Charter Academy (Grade 5)							16%	14%	15%	5%
	Advantage Charter Academy (Grade 6)							20%	21%	25%	13%
LA	Advantage Charter Academy (Grade 7)	1818 Northeast Evangeline Thruway	Lafayette, LA 70501	Lafayette Parish	Board of Elementary and Secondary Education	2014	K - 8	15%	25%	7%	8%
	Advantage Charter Academy (Grade 8)							29%	24%	11%	13%
	Willow Charter Academy (Grade 3)							28%	50%	21%	48%
	Willow Charter Academy (Grade 4)							10%	55%	25%	51%
	Willow Charter Academy (Grade 5)							15%	47%	11%	41%
LA	Willow Charter Academy (Grade 6)							11%	38%	6%	37%
	Willow Charter Academy (Grade 7)							22%	47%	12%	37%
	Willow Charter Academy (Grade 8)							21%	43%	10%	33%



# High Point Preparatory Academy

## Financial Oversight – Annual Audit

### Overview of an Audit

- A financial audit is an objective examination and evaluation of an organization's financial statements to ensure the financial records are a fair and accurate representation of the transactions they represent
- Annual audit should be performed by a qualified CPA firm with expertise in charter schools
- Auditors are responsible for conducting their audits in accordance with auditing standards generally accepted in the US and the standards contained in the Government Auditing Standards issued by the Comptroller General of the US
- Plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement
- Audit involves performing procedures to obtain audit evidence about the amounts and disclosures. The procedures selected depend on auditor's judgment, including the assessment of the risk of material misstatement, whether due to fraud or error.
- Required to consider internal controls; we do not express an opinion on internal controls



# High Point Preparatory Academy

## Financial Oversight – Annual Audit

### Process of an Audit

- Planning with the auditor
- Transaction/systems tests
- Single audit (if applicable)
- Substantive testing
- Financial report – Audited financial statements
- Auditor’s opinion – Reasonable, rather than absolute assurance, the financial statements are free of material misstatement. An auditor DOES NOT test 100% of an organization’s transactions
- Management letter



# High Point Preparatory Academy

## Financial Oversight – Annual Audit

### Evaluation of the audit results with the CPA firm

- Discussion of the overall audit process
- Executive session - Discussion without the presence of management

### Management is responsible for preventing and detecting fraud

- Difficult because it is intentionally hidden
- May involve collusion by multiple individuals
- Management is responsible for establishing appropriate internal controls
- Auditors obtain reasonable assurance that the financial statements are not materially misstated due to fraud



# High Point Preparatory Academy

## Financial Oversight – Annual Audit

### Items not covered by an auditor's opinion

- Effectiveness of programs
- If budgeted/actual amounts spent are reasonable for the organization
- Evaluation of financial management personnel's performance
- Items related to judgment regarding operations of the organization – These are management related



# Appendix P: Required Signed and Notarized Documents

## High Point Preparatory Academy

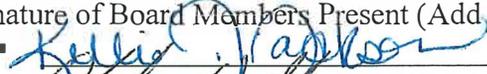
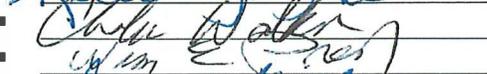
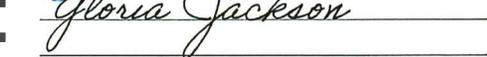
### Charter School Required Signature Certification

**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.

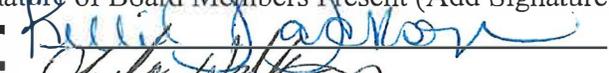
- ❖ The selected Board Attorney that he/she has reviewed with the full Board of Directors, listed within the application, all the governance documents and liabilities associated with being on the Board of a Non-Profit Corporation.

- Name of the Selected Board Attorney: John Flynn, Carruthers and Roth, P.A.
- Date of Review: March 2, 2022
- Signature of Board Members Present (Add Signature Lines as Needed):

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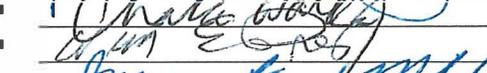
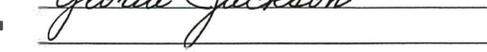
- ❖ The selected Board Auditor that he/she has reviewed with the full Board of Directors, listed within the application, all the items required for the annual audit and 990 preparations.

- Name of the Selected Board Auditor: Plante Moran
- Date of Review: April 6, 2022
- Signature of Board Members Present (Add Signature Lines as Needed):

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- ❖ If contracting with a CMO/EMO, that the selected management company has reviewed with the full Board of Directors, listed within the application, all the items required and the associated management contract and operations.

- Name of the Contact for Selected EMO/CMO: National Heritage Academies
- Date of Review: April 6, 2022
- Signature of Board Members Present (Add Signature Lines as Needed):

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- ❖ If contracting with a financial management service provider that the selected financial service provider has reviewed with the full Board of Directors, listed within the application, all the financial processes and services provided.
  - Name of the Contact: N/A
  - Name of the Selected Financial Service Provider: *N/A – EMO will provide these services.*
  - Date of Review: N/A
- ❖ If the proposed Board of Directors, listed within the application, is contracting with a service provider to operate PowerSchool that the service provider has reviewed all of the financial processes and services provided.
  - Name of the Contact: N/A
  - Name of the Selected PowerSchool Service Provider: *N/A – EMO will provide these services.*
  - Date of Review: N/A

**Certification**

I, Kellie Jackson, as Board Chair, certify that each Board Member has reviewed and participated in the selection of the individuals and vendors attached to this document as evidenced by the full Board of Director signatures outlined above. The information I am providing to the North Carolina State Board of Education as High Point Preparatory Academy Charter School is true and correct in every respect.

Signature

Date

4/6/2022

# Signature Page

The foregoing application is submitted on behalf of **High Point Preparatory Academy**. 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: Kellie Jackson  
Board Position: chair  
Signature: Kellie Jackson  
Date: 3/22/2022

Sworn to and subscribed before me this 22 day of March, 2022.

Notary Public: Tiffany Baker Collier

Official Seal:

My commission expires: 08/25, 2023.





# Appendix N: Proposed School Budget for Year 1 through Year 5

## High Point Preparatory Academy

### 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: <b>410-Guilford</b>	What percentage of students from the LEA selected above will qualify for EC funding? <b>13%</b>
LEA #2:	What percentage of students from the LEA selected above will qualify for EC funding?
LEA #3:	What percentage of students from the LEA selected above will qualify for EC funding?

Grade	Year 1			Year 2			Year 3			Year 4			Year 5		
	LEA #1 410	LEA #2	LEA #3	LEA #1 410	LEA #2	LEA #3	LEA #1 410	LEA #2	LEA #3	LEA #1 410	LEA #2	LEA #3	LEA #1 410	LEA #2	LEA #3
Kindergarten	100			100			100			100			100		
Grade 1	84			84			84			84			84		
Grade 2	84			84			84			84			84		
Grade 3	84			84			84			84			84		
Grade 4	84			84			84			84			84		
Grade 5	84			84			84			84			84		
Grade 6				84			84			84			84		
Grade 7							84			84			84		
Grade 8										84			84		
Grade 9															
Grade 10															
Grade 11															
Grade 12															
<b>LEA Totals:</b>	<b>520</b>	<b>0</b>	<b>0</b>	<b>604</b>	<b>0</b>	<b>0</b>	<b>688</b>	<b>0</b>	<b>0</b>	<b>772</b>	<b>0</b>	<b>0</b>	<b>772</b>	<b>0</b>	<b>0</b>

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:		410-Guilford		
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds	\$5,929.66	520	\$3,083,423.20	
Local Funds	\$2,809.00	520	\$1,460,680.00	
State EC Funds	\$4,800.62	66	\$318,281.11	
Federal EC Funds	\$1,514.35	66	\$100,401.41	
<b>Total:</b>			\$4,962,785.71	

LEA #2:				
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds		0		
Local Funds		0		
State EC Funds		0		
Federal EC Funds		0		
<b>Total:</b>			\$0.00	

LEA #3:				
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds				
Local Funds				
State EC Funds				
Federal EC Funds				
<b>Total:</b>			\$0.00	

## 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	\$ 3,083,423	\$ 3,581,515	\$ 4,079,606	\$ 4,577,698	\$ 4,577,698
Local Per Pupil Funds	\$ 1,460,680	\$ 1,696,636	\$ 1,932,592	\$ 2,168,548	\$ 2,168,548
State EC Funds	\$ 318,281	\$ 369,696	\$ 421,110	\$ 472,525	\$ 472,525
Federal EC Funds	-	\$ 100,401	\$ 132,839	\$ 149,057	\$ 149,057
<b>Other Funds*</b>	\$ 986,443	\$ 668,840	\$ 375,419	\$ 431,573	\$ 441,106
<b>Working Capital*</b>					
<b>TOTAL REVENUE:</b>	<b>\$ 5,848,827</b>	<b>\$ 6,417,088</b>	<b>\$ 6,941,566</b>	<b>\$ 7,799,401</b>	<b>\$ 7,808,934</b>

\*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**

Budget Expenditure Projections	Year 1			Year 2			Year 3			Year 4			Year 5		
	Number of Staff	Average Salary	Total Salary	Number of Staff	Average Salary	Total Salary	Number of Staff	Average Salary	Total Salary	Number of Staff	Average Salary	Total Salary	Number of Staff	Average Salary	Total Salary
<b>Administrative &amp; Support Personnel</b>															
Lead Administrator	1.00	\$ 116,700	\$ 116,700	1.00	\$ 120,200	\$ 120,200	1.00	\$ 123,800	\$ 123,800	1.00	\$ 127,500	\$ 127,500	1.00	\$ 131,300	\$ 131,300
Assistant Administrator			\$ -			\$ -			\$ -			\$ -			\$ -
Finance Officer			\$ -			\$ -			\$ -			\$ -			\$ -
Clerical	1.00	\$ 30,700	\$ 30,700	1.00	\$ 31,600	\$ 31,600	1.00	\$ 32,500	\$ 32,500	1.00	\$ 33,500	\$ 33,500	1.00	\$ 34,500	\$ 34,500
Food Service Staff			\$ -			\$ -			\$ -			\$ -			\$ -
Custodians			\$ -			\$ -			\$ -			\$ -			\$ -
Transportation Staff			\$ -			\$ -			\$ -			\$ -			\$ -
Deans	2.00	\$ 62,800	\$ 125,600	3.00	\$ 64,700	\$ 194,100	3.00	\$ 66,600	\$ 199,800	3.00	\$ 68,600	\$ 205,800	3.00	\$ 70,700	\$ 212,100
Registrar	1.00	\$ 44,100	\$ 44,100	1.00	\$ 45,400	\$ 45,400	1.00	\$ 46,800	\$ 46,800	1.00	\$ 48,200	\$ 48,200	1.00	\$ 49,600	\$ 49,600
Admissions Representative	1.00	\$ 49,200	\$ 49,200	1.00	\$ 50,700	\$ 50,700	1.00	\$ 52,200	\$ 52,200	1.00	\$ 53,800	\$ 53,800	1.00	\$ 55,400	\$ 55,400
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*** Edit text as needed. ***			\$ -			\$ -			\$ -			\$ -			\$ -
<b>Total Admin and Support:</b>	<b>6</b>		<b>\$ 366,300</b>	<b>7</b>		<b>\$ 442,000</b>	<b>7</b>		<b>\$ 455,100</b>	<b>7</b>		<b>\$ 468,800</b>	<b>7</b>		<b>\$ 482,900</b>
<b>Instructional Personnel</b>															
Core Content Teacher(s)	19.00	\$ 49,500	\$ 940,500	22.00	\$ 51,000	\$ 1,122,000	25.00	\$ 52,500	\$ 1,312,500	28.00	\$ 54,100	\$ 1,514,800	28.00	\$ 55,700	\$ 1,559,600
Electives/Specialty Teacher(s)	4.00	\$ 49,400	\$ 197,600	4.00	\$ 50,900	\$ 203,600	4.00	\$ 52,400	\$ 209,600	4.00	\$ 54,000	\$ 216,000	4.00	\$ 55,600	\$ 222,400
Exceptional Children Teacher(s)	3.00	\$ 49,400	\$ 148,200	4.00	\$ 50,900	\$ 203,600	5.00	\$ 52,400	\$ 262,000	5.00	\$ 54,000	\$ 270,000	5.00	\$ 55,600	\$ 278,000
Instructional Support	0.38	\$ 37,440	\$ 14,040	0.38	\$ 38,600	\$ 14,475	0.38	\$ 39,800	\$ 14,925	0.38	\$ 41,000	\$ 15,375	0.38	\$ 42,200	\$ 15,825
Teacher Assistants	1.75	\$ 22,800	\$ 39,900	2.63	\$ 23,500	\$ 61,688	3.50	\$ 24,200	\$ 84,700	4.88	\$ 24,900	\$ 121,388	4.88	\$ 25,600	\$ 124,800
English Language Learner Teacher	1.00	\$ 49,400	\$ 49,400	1.00	\$ 50,900	\$ 50,900	1.00	\$ 52,400	\$ 52,400	1.00	\$ 54,000	\$ 54,000	1.00	\$ 55,600	\$ 55,600
Interventionists	3.75	\$ 22,800	\$ 85,500	4.00	\$ 23,500	\$ 94,000	4.25	\$ 24,200	\$ 102,850	4.50	\$ 24,900	\$ 112,050	4.75	\$ 25,600	\$ 121,600
Substitute Teachers	1.80	\$ 23,900	\$ 43,020	2.00	\$ 24,600	\$ 49,200	2.20	\$ 25,300	\$ 55,660	2.40	\$ 26,100	\$ 62,640	2.40	\$ 26,900	\$ 64,560
Social Worker	1.00	\$ 59,500	\$ 59,500	1.00	\$ 61,300	\$ 61,300	1.00	\$ 63,100	\$ 63,100	1.00	\$ 65,000	\$ 65,000	1.00	\$ 67,000	\$ 67,000
Recess Aides	1.00	\$ 15,800	\$ 15,800	1.00	\$ 16,300	\$ 16,300	1.00	\$ 16,800	\$ 16,800	1.00	\$ 17,300	\$ 17,300	1.00	\$ 17,800	\$ 17,800
<b>Total Instructional Personnel:</b>	<b>36.675</b>		<b>\$ 1,593,460</b>	<b>42</b>		<b>\$ 1,877,063</b>	<b>47.325</b>		<b>\$ 2,174,535</b>	<b>52.15</b>		<b>\$ 2,448,553</b>	<b>52.4</b>		<b>\$ 2,527,185</b>
<b>Total Admin, Support and Instructional Personnel:</b>	<b>42.675</b>		<b>\$ 1,959,760</b>	<b>49</b>		<b>\$ 2,319,063</b>	<b>54.325</b>		<b>\$ 2,629,635</b>	<b>59.15</b>		<b>\$ 2,917,352.50</b>	<b>59.4</b>		<b>\$ 3,010,085</b>
<b>Benefits</b>															
Benefits	Year 1			Year 2			Year 3			Year 4			Year 5		
	Number of Staff	Cost Per	Total	Number of Staff	Cost Per	Total	Number of Staff	Cost Per	Total	Number of Staff	Cost Per	Total	Number of Staff	Cost Per	Total
<b>Administrative &amp; Support Benefits</b>															
Health Insurance	6.00	\$ 10,600	\$ 63,600	7.00	\$ 10,800	\$ 75,600	7.00	\$ 11,025	\$ 77,175	7.00	\$ 11,250	\$ 78,750	7.00	\$ 11,475	\$ 80,325
Retirement Plan-NC State			\$ -			\$ -			\$ -			\$ -			\$ -
Retirement Plan-Other	6.00	\$ 1,405	\$ 8,430	7.00	\$ 1,445	\$ 10,115	7.00	\$ 1,480	\$ 10,360	7.00	\$ 1,510	\$ 10,570	7.00	\$ 1,550	\$ 10,850
Life Insurance			\$ -			\$ -			\$ -			\$ -			\$ -
Disability			\$ -			\$ -			\$ -			\$ -			\$ -
Medicare	6.00	\$ 605	\$ 3,630	7.00	\$ 625	\$ 4,375	7.00	\$ 640	\$ 4,480	7.00	\$ 650	\$ 4,550	7.00	\$ 670	\$ 4,690
Social Security	6.00	\$ 2,600	\$ 15,600	7.00	\$ 2,685	\$ 16,795	7.00	\$ 2,745	\$ 19,215	7.00	\$ 2,785	\$ 19,495	7.00	\$ 2,860	\$ 20,020
Dental Insurance	6.00	\$ 800	\$ 4,800	7.00	\$ 825	\$ 5,775	7.00	\$ 850	\$ 5,950	7.00	\$ 875	\$ 6,125	7.00	\$ 900	\$ 6,300
Life and Disability Insurance	6.00	\$ 45	\$ 270	7.00	\$ 50	\$ 350	7.00	\$ 50	\$ 350	7.00	\$ 50	\$ 350	7.00	\$ 50	\$ 350
Workers' Compensation	6.00	\$ 140	\$ 840	7.00	\$ 145	\$ 1,015	7.00	\$ 150	\$ 1,050	7.00	\$ 150	\$ 1,050	7.00	\$ 155	\$ 1,085
FUTA & SUTA	6.00	\$ 250	\$ 1,500	7.00	\$ 260	\$ 1,820	7.00	\$ 265	\$ 1,855	7.00	\$ 275	\$ 1,925	7.00	\$ 275	\$ 1,925
Other	6.00	\$ 250	\$ 1,500	7.00	\$ 280	\$ 1,960	7.00	\$ 285	\$ 1,995	7.00	\$ 285	\$ 1,995	7.00	\$ 295	\$ 2,065
<b>Total Admin and Support Benefits:</b>			<b>\$ 100,170</b>			<b>\$ 119,805</b>			<b>\$ 122,430</b>			<b>\$ 124,810</b>			<b>\$ 127,610</b>
<b>Instructional Personnel Benefits</b>															
Health Insurance	34.88	\$ 10,600	\$ 369,675	40.00	\$ 10,800	\$ 432,000	45.13	\$ 11,025	\$ 497,503	49.75	\$ 11,250	\$ 559,688	50.00	\$ 11,475	\$ 573,750
Retirement Plan-NC State			\$ -			\$ -			\$ -			\$ -			\$ -
Retirement Plan-Other	34.88	\$ 1,405	\$ 48,999	40.00	\$ 1,445	\$ 57,800	45.13	\$ 1,480	\$ 66,785	49.75	\$ 1,510	\$ 75,123	50.00	\$ 1,550	\$ 77,500
Social Security	36.68	\$ 2,600	\$ 95,355	42.00	\$ 2,685	\$ 112,770	47.33	\$ 2,745	\$ 129,907	52.15	\$ 2,785	\$ 145,238	52.40	\$ 2,860	\$ 149,864
Disability			\$ -			\$ -			\$ -			\$ -			\$ -
Medicare	36.68	\$ 605	\$ 22,188	42.00	\$ 625	\$ 26,250	47.33	\$ 640	\$ 30,288	52.15	\$ 650	\$ 33,898	52.40	\$ 670	\$ 35,108
Life Insurance			\$ -			\$ -			\$ -			\$ -			\$ -
Dental Insurance	34.88	\$ 800	\$ 27,900	40.00	\$ 825	\$ 33,000	45.13	\$ 850	\$ 38,356	49.75	\$ 875	\$ 43,531	50.00	\$ 900	\$ 45,000
Life and Disability Insurance	34.88	\$ 45	\$ 1,569	40.00	\$ 50	\$ 2,000	45.13	\$ 50	\$ 2,256	49.75	\$ 50	\$ 2,488	50.00	\$ 50	\$ 2,500
Workers' Compensation	34.88	\$ 140	\$ 4,883	40.00	\$ 145	\$ 5,800	45.13	\$ 150	\$ 6,769	49.75	\$ 150	\$ 7,463	50.00	\$ 155	\$ 7,750
FUTA & SUTA	36.68	\$ 250	\$ 9,169	42.00	\$ 260	\$ 10,920	47.33	\$ 265	\$ 12,541	52.15	\$ 275	\$ 14,341	52.40	\$ 275	\$ 14,410
Other	34.88	\$ 250	\$ 8,719	40.00	\$ 280	\$ 11,200	45.13	\$ 285	\$ 12,861	49.75	\$ 285	\$ 14,179	50.00	\$ 295	\$ 14,750
<b>Total Instructional Personnel Benefits:</b>			<b>\$ 588,457</b>			<b>\$ 691,740</b>			<b>\$ 797,266</b>			<b>\$ 895,947</b>			<b>\$ 920,632</b>
<b>Total Personnel Benefits:</b>			<b>\$ 688,627</b>			<b>\$ 811,545</b>			<b>\$ 919,696</b>			<b>\$ 1,020,757</b>			<b>\$ 1,048,242</b>
<b>Total Admin &amp; Support Personnel (Salary &amp; Benefits):</b>	<b>6</b>		<b>\$ 466,470</b>	<b>7</b>		<b>\$ 561,805</b>	<b>7</b>		<b>\$ 577,530</b>	<b>7</b>		<b>\$ 593,610.00</b>	<b>7</b>		<b>\$ 610,510</b>
<b>Total Instructional Personnel (Salary &amp; Benefits):</b>	<b>36.675</b>		<b>\$ 2,181,917</b>	<b>42</b>		<b>\$ 2,568,803</b>	<b>47.325</b>		<b>\$ 2,971,801</b>	<b>52.15</b>		<b>\$ 3,344,499</b>	<b>52.4</b>		<b>\$ 3,447,817</b>
<b>TOTAL PERSONNEL:</b>	<b>42.675</b>		<b>\$ 2,648,387</b>	<b>49</b>		<b>\$ 3,130,608</b>	<b>54.325</b>		<b>\$ 3,549,331</b>	<b>59.15</b>		<b>\$ 3,938,109</b>	<b>59.4</b>		<b>\$ 4,058,327</b>

\*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
<b>Office</b>					
Office Supplies	\$ 24,600.00	\$ 14,600.00	\$ 16,100.00	\$ 17,600.00	\$ 17,600.00
Paper					
Computers & Software	\$ 750.00	\$ 750.00	\$ 750.00	\$ 750.00	\$ 750.00
Communications & Telephone	\$ 2,750.00	\$ 2,750.00	\$ 2,750.00	\$ 2,750.00	\$ 2,750.00
Copier leases					
Other	\$ 800.00	\$ 830.00	\$ 850.00	\$ 880.00	\$ 900.00
Office Equipment	\$ 30,890.00	\$ 32,810.00	\$ 34,730.00	\$ 36,660.00	\$ 37,190.00
<b>Management Company</b>					
Contract Fees					
Other					
*** Insert rows and edit text as needed. ***					
<b>Professional Contract</b>					
Legal Counsel	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00
Student Accounting					
Financial	\$ 75,010.00	\$ 74,840.00	\$ 74,760.00	\$ 110,840.00	\$ 94,940.00
Other					
*** Insert rows and edit text as needed. ***					
<b>Facilities</b>					
Facility Lease/Mortgage	\$ 1,100,000.00	\$ 1,100,000.00	\$ 1,100,000.00	\$ 1,100,000.00	\$ 1,100,000.00
Maintenance	\$ 115,390.00	\$ 122,130.00	\$ 84,250.00	\$ 91,850.00	\$ 91,720.00
Custodial Supplies					
Custodial Contract	\$ 118,500.00	\$ 140,500.00	\$ 164,500.00	\$ 189,500.00	\$ 195,500.00
Insurance (pg19)	\$ 22,950.00	\$ 23,830.00	\$ 24,650.00	\$ 25,500.00	\$ 26,220.00
Other	\$ 17,300.00	\$ 2,380.00	\$ 2,450.00	\$ 2,530.00	\$ 2,600.00
Rent of Equipment	\$ 15,970.00	\$ 17,770.00	\$ 19,560.00	\$ 21,350.00	\$ 21,350.00
<b>Utilities</b>					
Electric	\$ 50,860.00	\$ 52,550.00	\$ 54,250.00	\$ 55,940.00	\$ 57,640.00
Gas	\$ 4,240.00	\$ 4,240.00	\$ 4,240.00	\$ 4,240.00	\$ 4,240.00
Water/Sewer	\$ 7,500.00	\$ 7,730.00	\$ 7,950.00	\$ 8,200.00	\$ 8,450.00
Trash	\$ 5,700.00	\$ 6,600.00	\$ 7,500.00	\$ 8,400.00	\$ 8,400.00
Other	\$ 4,000.00	\$ 4,130.00	\$ 4,250.00	\$ 4,380.00	\$ 4,500.00
*** Insert rows and edit text as needed. ***					
<b>Transportation</b>					
Buses					
Gas					
Oil/Tires & Maintenance					
Other	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00
*** Insert rows and edit text as needed. ***					
<b>Other</b>					
Marketing	\$ 144,560.00	\$ 146,750.00	\$ 148,640.00	\$ 194,170.00	\$ 174,630.00
Child nutrition	\$ 209,190.00	\$ 245,360.00	\$ 283,130.00	\$ 322,520.00	\$ 330,050.00
Travel	\$ 13,900.00	\$ 14,930.00	\$ 16,020.00	\$ 17,140.00	\$ 17,590.00
Other	\$ 7,500.00	\$ 7,720.00	\$ 7,950.00	\$ 8,170.00	\$ 8,430.00
Administrative Support	\$ 96,690.00	\$ 96,030.00	\$ 95,510.00	\$ 148,650.00	\$ 124,610.00
Facilities Acquisition	\$ 24,700.00	\$ 27,800.00	\$ 4,910.00	\$ 7,640.00	\$ 6,410.00
Partner Relations	\$ 62,960.00	\$ 62,510.00	\$ 62,150.00	\$ 96,700.00	\$ 81,030.00
Board Expenditures	\$ 35,000.00	\$ 35,000.00	\$ 35,000.00	\$ 35,000.00	\$ 35,000.00
<b>Total Administrative &amp; Support Operations:</b>	<b>\$ 2,211,710.00</b>	<b>\$ 2,264,540.00</b>	<b>\$ 2,276,850.00</b>	<b>\$ 2,531,360.00</b>	<b>\$ 2,472,500.00</b>

OPERATIONS BUDGET: Instructional		Year 1	Year 2	Year 3	Year 4	Year 5
<b>Classroom Technology</b>						
Software		\$ 1,900.00	\$ 1,960.00	\$ 2,010.00	\$ 2,080.00	\$ 2,140.00
Other						
Technology Services		\$ 165,000.00	\$ 175,500.00	\$ 186,000.00	\$ 196,500.00	\$ 195,320.00
<b>Instructional Contract</b>						
Staff Development		\$ 92,870.00	\$ 83,050.00	\$ 80,690.00	\$ 97,030.00	\$ 91,680.00
Staff Recruitment and Retention		\$ 78,150.00	\$ 90,050.00	\$ 101,770.00	\$ 171,850.00	\$ 145,580.00
Special Education Services		\$ 158,210.00	\$ 195,600.00	\$ 224,020.00	\$ 232,360.00	\$ 238,580.00
Curriculum Development & Intervention Svcs		\$ 58,490.00	\$ 67,180.00	\$ 75,690.00	\$ 131,560.00	\$ 109,980.00
<b>Books and Supplies</b>						
Instructional Materials		\$ 149,740.00	\$ 124,250.00	\$ 134,850.00	\$ 145,740.00	\$ 145,610.00
Curriculum/Texts		\$ 86,620.00	\$ 65,920.00	\$ 70,985.00	\$ 77,372.00	\$ 79,347.00
Copy Paper		\$ 21,850.00	\$ 25,480.00	\$ 29,290.00	\$ 33,280.00	\$ 34,240.00
Testing Supplies		\$ 37,840.00	\$ 39,590.00	\$ 41,380.00	\$ 58,090.00	\$ 51,400.00
Instructional Equipment		\$ 135,180.00	\$ 149,980.00	\$ 164,780.00	\$ 179,590.00	\$ 179,590.00
Field Trips		\$ 2,880.00	\$ 3,380.00	\$ 3,920.00	\$ 4,480.00	\$ 4,640.00
<b>Total Instructional Operations:</b>		<b>\$ 988,730.00</b>	<b>\$ 1,021,940.00</b>	<b>\$ 1,115,385.00</b>	<b>\$ 1,329,932.00</b>	<b>\$ 1,278,107.00</b>
<b>TOTAL OPERATIONS:</b>		<b>\$ 3,200,440.00</b>	<b>\$ 3,286,480.00</b>	<b>\$ 3,392,235.00</b>	<b>\$ 3,861,292.00</b>	<b>\$ 3,750,607.00</b>

\*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	\$ 2,648,387.13	\$ 3,130,607.50	\$ 3,549,331.25	\$ 3,938,109.00	\$ 4,058,327.00
Total Operations	M	\$ 3,200,440.00	\$ 3,286,480.00	\$ 3,392,235.00	\$ 3,861,292.00	\$ 3,750,607.00
Total Expenditures	N = J + M	\$ 5,848,827.13	\$ 6,417,087.50	\$ 6,941,566.25	\$ 7,799,401.00	\$ 7,808,934.00
Total Revenue	Z	\$ 5,848,827.13	\$ 6,417,087.50	\$ 6,941,566.25	\$ 7,799,401.00	\$ 7,808,934.00
Surplus / (Deficit)	= Z - N	\$ -	\$ -	\$ -	\$ -	\$ -



# Appendix L: Insurance Quotes

## High Point Preparatory Academy



**Arthur J. Gallagher & Co.**  
BUSINESS WITHOUT BARRIERS™

February 22, 2022

High Point Preparatory Academy  
High Point, NC (Guilford County)

We have prepared an estimate cost of the insurance portfolio for High Point Preparatory Academy. The premiums listed below are just an estimate and are not bindable; the insurance carriers would require a full underwriting submission to calculate the accurate premiums. I feel confident that the summary below fulfills the requirements of the bid documents.

Type of Coverage	Coverage Amount	Estimated Premiums
Comprehensive General Liability (including personal/bodily injury) {based on 1,000 students}	\$1,000,000 per occurrence; \$2,000,000 aggregate	\$2,000
Errors & Omissions - Directors, Officers, School Leaders {based on 1,000 student}	\$1,000,000 per occurrence; \$3,000,000 aggregate	\$2,700
Property (content coverage) Special Form, Replacement Cost	\$25,000	\$400
Motor Vehicle Liability (hired, not owned)	\$1,000,000	\$250
Crime	\$500,000	\$5
Workers Compensation	Statutory coverage per the laws of North Carolina	\$500
Umbrella (for excess over CGL, Auto, E&O, Employers' Liability, etc.)	\$4,000,000	\$2,500

After you have reviewed this letter should you have any questions or comments, please do not hesitate to call. My direct Number is 727-796-6164 and my email address is Dawn\_Agovino@ajg.com.

Sincerely,

*Dawn Agovino*

Dawn Agovino, CRM, CIC  
Area Assistant Vice President



# Appendix M: Revenue Assurances and/or Working Capital Report

## High Point Preparatory Academy



April 29, 2022

Dr. Kellie Jackson  
Lead Applicant  
High Point Preparatory Academy

*Via: Hand Delivery*

Re: Letter of Financial Commitment

Dear Dr. Jackson,

National Heritage Academies (NHA) is proud and privileged to partner with you to provide a quality public charter school choice to families and students in Guilford County through the proposal for High Point Preparatory Academy. As you know, NHA currently partners with 99 school boards across nine states to provide excellent K-12 public charter school choices to thousands of families and students. This includes 15 other schools within the state. Through this experience we know that a major success factor for any school, and especially any charter school, is appropriate fiduciary oversight and planning.

With this letter, I confirm that, should High Point Preparatory Academy receive a charter, NHA will make financial contributions as outlined in the Services Agreement between NHA and the Board, for as long as NHA is engaged as the school's management partner. As our Services Agreement states, neither the school nor any individual Board member shall be legally obligated to repay NHA for NHA contributions made to or on behalf of the school.

Our mutual commitment and partnership to creating an additional quality public charter school choice for children in Guilford County is of the utmost importance to NHA; we will continue to meet the essence and substance of the vision we've jointly laid out for students in the charter application. I'm hopeful that this letter and our Services Agreement will suffice for the needs of your charter proposal.

Sincerely,

Bob Owen  
Chief Financial Officer, National Heritage Academies



# Appendix K: Articles of Incorporation/Municipal Charter

## High Point Preparatory Academy

SOSID: 2121573  
Date Filed: 1/29/2021 1:02:00 PM  
Elaine F. Marshall  
North Carolina Secretary of State  
C2021 022 10297

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 nonprofit corporation is: High Point STEM Academy-School of Excellence

2.  (Check only if applicable.) The corporation is a charitable or religious corporation as defined in NCGS §55A-1-40(4).

3. The name of the initial registered agent is: Dr. Kellie J. Jackson, NBCT

4. The street address and county of the initial registered agent's office of the corporation is:

Number and Street: 3415 Langdale Dr.  
City: High Point State: NC Zip Code: 27265 County: Guilford

The mailing address *if different from the street address* of the initial registered agent's office is:

Number and Street or PO Box: \_\_\_\_\_  
City: \_\_\_\_\_ State: NC Zip Code: \_\_\_\_\_ County: \_\_\_\_\_

5. The name and address of each incorporator is as follows:

Name	Address
<u>n/a</u>	
<u>Kellie Jackson</u>	<u>3415 Langdale Dr., High Point, NC 27265</u>

6. (Check either "a" or "b" below.)

- a.  The corporation will have members.
- b.  The corporation will not have members.

7. Attached are provisions regarding the distribution of the corporation's assets upon its dissolution.

8. Any other provisions which the corporation elects to include are attached.

9. The street address and county of the principal office of the corporation is:

Principal Office Telephone Number: 336-471-7236

Number and Street: 3415 Langdale Dr.

City: High Point State: NC Zip Code: 27265 County: Guilford

The mailing address *if different from the street address* of the principal office is:

Number and Street or PO Box: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ County: \_\_\_\_\_

10. (Optional): Listing of Officers (See instructions for why this is important)

Name	Address	Title

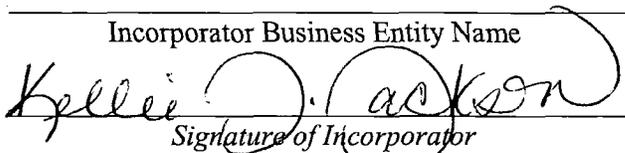
**Privacy Redaction**

11. (Optional): Please provide a business e-mail address:

The Secretary of State's Office will e-mail the business automatically at the address provided at no charge when a document is filed. The e-mail provided will not be viewable on the website. For more information on why this service is being offered, please see the instructions for this document.

12. These articles will be effective upon filing, unless a future time and/or date is specified: \_\_\_\_\_

This is the 22<sup>nd</sup> day of January, 2021.

Incorporator Business Entity Name  
  
 Signature of Incorporator  
 Dr. Kellie J. Jackson, NBCT/Superintendent  
 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.

### Purpose of Corporation

This corporation is organized for the following purpose(s) (*check as applicable*):

- religious,
- charitable,
- educational,
- testing for public safety,
- scientific,
- literary,
- fostering national or international amateur sports competition, and/or
- prevention of cruelty to children or animals,

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) 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.



# NORTH CAROLINA

## Department of the Secretary of State

**To all whom these presents shall come, Greetings:**

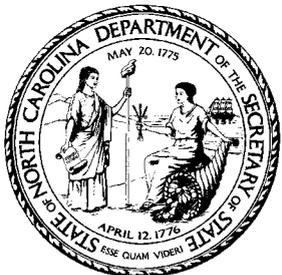
I, ELAINE F. MARSHALL, Secretary of State of the State of North Carolina, do hereby certify the following and hereto attached to be a true copy of

### ARTICLES OF AMENDMENT

**OF**

### HIGH POINT PREPARATORY ACADEMY

the original of which was filed in this office on the 19th day of April, 2022.



Scan to verify online.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 19th day of April, 2022.

*Elaine F. Marshall*

**Secretary of State**

SOSID: 2398250  
Date Filed: 4/19/2022 1:42:00 PM  
Elaine F. Marshall  
North Carolina Secretary of State  
C2022 097 04752

**ARTICLES OF AMENDMENT  
TO THE  
ARTICLES OF INCORPORATION  
OF  
HIGH POINT STEM ACADEMY-SCHOOL OF EXCELLENCE**

Pursuant to Section 55A-10-05 of the General Statutes of North Carolina, the undersigned, HIGH POINT STEM ACADEMY-SCHOOL OF EXCELLENCE, a North Carolina nonprofit corporation (the "Corporation"), does hereby cause these Articles of Amendment to be executed in its corporate name, and submits the same for the purpose of amending its Articles of Incorporation:

1. The present name of the Corporation is High Point STEM Academy-School of Excellence.

2. The Corporation's Articles of Incorporation, as filed in the Office of the North Carolina Secretary of State on January 29, 2021, shall be and hereby are amended by deleting the present Article 1 thereof in its entirety, and by substituting in lieu thereof the following:

“1. The name of the Corporation is: High Point Preparatory Academy.”

3. The Corporation's Articles of Incorporation, as filed in the Office of the North Carolina Secretary of State on January 29, 2021, shall be and hereby are further amended by adding a new Article 13 thereto, as follows:

“13. Any person who at any time serves or has served as a director or officer of the corporation shall have the right to be indemnified by the corporation to the fullest extent permitted by law against (a) reasonable expenses, including attorneys' fees, actually and necessarily incurred by him or her in connection with any threatened, pending, or completed civil, criminal, administrative, investigative, or arbitral action, suit, or proceeding (and any appeal therein), whether or not brought by or on behalf of the corporation, seeking to hold him or her liable by reason of the fact that he or she is or was acting in such capacity, and (b) reasonable payments made by him or her in satisfaction of any judgment, money decree, fine, penalty, or settlement for which he or she may have become liable in any such action, suit, or proceeding. The corporation shall not indemnify any person under this provision against any liability or litigation expense he or she may incur on account of his or her activities that at the time taken were known by him or her to be clearly in conflict with the best interests of the corporation. Furthermore, the corporation shall not indemnify any person with respect to any liability of that person arising out of Section 55A-8-32 or Section 55A-8-33 of the Nonprofit Corporation Act or any transaction from which the person derived an improper personal financial benefit as provided in Section 55A-2-02(b)(4) of the Nonprofit Corporation Act. Any person who at any time serves in the aforesaid capacity for or on behalf of the corporation shall be deemed to be doing so or to have done so

in reliance upon, and as consideration for, the right of indemnification provided herein. Such right shall inure to the benefit of the legal representatives of any such person and shall not be exclusive of any other rights to which such person may be entitled apart from this provision. Neither the amendment or repeal of this Article, nor the adoption of any provision of these Articles of Incorporation inconsistent with this Article, shall eliminate or reduce the protection afforded by this Article to a director or officer of the corporation with respect to any matter which occurred, or any cause of action, suit or claim which but for this Article would have accrued or arisen, prior to such amendment, repeal or adoption.”

4. The Corporation's Articles of Incorporation, as filed in the Office of the North Carolina Secretary of State on January 29, 2021, shall be and hereby are further amended by adding a new Article 14 thereto, as follows:

“14. The corporation shall indemnify each of its non-director and non-officer volunteers for all acts or omissions of each said volunteer, provide that:

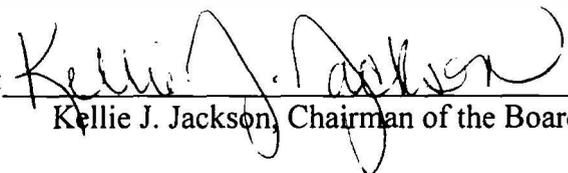
- (i) The volunteer was acting or reasonably believed he or she was acting within the scope of his or her authority;
- (ii) The volunteer was acting in good faith;
- (iii) The volunteer’s conduct did not amount to gross negligence or willful and wanton misconduct;
- (iv) The volunteer’s conduct was not an intentional tort; and
- (v) The volunteer’s conduct was not a tort arising out of the ownership, maintenance, or use of a motor vehicle.”

5. This amendment to the Corporation's Articles of Incorporation was unanimously approved by the Board of Directors of the Corporation, and member approval was not required because the Corporation does not have members.

6. These Articles of Amendment shall be effective upon filing.

IN WITNESS WHEREOF, the Corporation has caused these Articles of Amendment to be executed in its corporate name on the 6<sup>th</sup> day of April, 2022.

HIGH POINT STEM ACADEMY-SCHOOL OF EXCELLENCE

By:   
Kellie J. Jackson, Chairman of the Board



# Appendix J: Proposed By-Laws of the School's Board of Directors

## High Point Preparatory Academy

**BYLAWS  
OF  
HIGH POINT PREPARATORY ACADEMY  
f/k/a High Point STEM Academy-School of Excellence**

*ARTICLE I — NAME*

The name of the corporation shall be High Point Preparatory Academy f/k/a High Point STEM Academy-School of Excellence (the “**Corporation**”).

*ARTICLE II — PURPOSES*

The purposes for which the Corporation is organized are:

(A) The Corporation is organized for the purpose of operating a public charter school in the State of North Carolina pursuant to N.C. Gen. Stat. §115C-238.29A *et seq.*;

(B) The Corporation is also organized for the purpose of providing a high quality, elementary and middle school education that places each student on the path to college readiness and closes achievement gaps.

(C) The purposes for which the Corporation is organized are exclusively religious, charitable, scientific, literary or educational within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, or the corresponding provisions of any future United States Internal Revenue laws (the “**Code**”). The Corporation shall not carry on any activities not permitted to be carried on by an organization exempt from Federal income tax under Section 501(c)(3) of the Code or the corresponding provision of any future United States Internal Revenue Code.

*ARTICLE III — OFFICES*

Section 1. Principal Office. The principal office of the Corporation shall be located at \_\_\_\_\_.

Section 2. Registered Office. The registered office of the Corporation may be the same as the principal office of the Corporation; provided, however, the Corporation’s registered office shall be located in the State of North Carolina, and shall be the business office of the resident agent.

Section 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 from time to time determine.

## *ARTICLE IV — BOARD OF DIRECTORS*

Section 1. General Powers. The business, property and affairs of the Corporation shall be managed under the direction of the Corporation's Board of Directors (the "Board") in accordance with the provisions of the Corporation's Articles of Incorporation (the "Articles"), these Bylaws (the "Bylaws"), and applicable law.

Section 2. Method of Selection, Number and Election of Directors. The number of Director positions on the Board (the "Directors") shall be not less than three (3) nor more than nine (9). The initial Director(s) shall be appointed by the incorporator of the Corporation and shall thereafter be appointed as provided in this Section 2. The Directors at any annual meeting may by resolution fix the number of Directors to be elected at the meeting; but in the absence of such resolution, the number of Directors elected at the meeting plus the number of Directors continuing in office shall constitute the number of Directors of the Corporation until the next annual meeting unless the number is changed by action of the Directors or unless a vacancy occurs and a majority of the remaining Directors elects not to fill such vacancy. Except with respect to the appointment of the initial Board of Directors and as provided in Section 7 of this Article, Directors shall be elected at the annual meeting of the Board by a plurality of the votes of the Directors at the time in office. Each Director then in office shall cast no more than one vote for each candidate and may vote for as many candidates as the number of vacancies on the Board. The candidates receiving the highest number of votes up to the number of Directors to be elected become Directors. The election of Directors shall be a part of the order of business of each annual meeting of the Board. Directors need not be residents of the State of North Carolina.

Section 3. Terms. The initial Board of Directors shall be divided into three classes, as nearly equal in number as may be, to serve in the first instance for terms of one (1), two (2) and three (3) years, respectively, and until their successors shall be elected and shall qualify, and thereafter the successors in each class of Directors shall be elected to serve for terms of three (3) years and until their successors shall be elected and shall qualify. In the event of any increase or decrease in the number of Directors, the additional or eliminated directorships shall be so classified or chosen that all classes of Directors shall remain or become equal in number, as nearly as can be. In the event of the death, resignation, retirement, removal or disqualification of a Director during the elected term of office, the Director's successor shall be elected to serve only until the expiration of the term of the predecessor. Directors may be reelected with no limit on the number of terms.

Section 4. Director Qualifications.

(a) Qualifications. A Director shall be willing and able to make decisions as a member of the Board in the best interests of the Corporation and shall submit on an annual basis a conflict of interest disclosure as prescribed by the Board.

(b) Excluded Persons. The following persons shall not be eligible to serve on the Board: (i) employees of the charter school operated by the Board; or (ii) any director, officer, or employee of a service provider or management company that contracts with the Corporation.

Section 5. Removal. A Director may be removed by the Board with or without cause by a resolution duly adopted by a majority vote of the number of Directors in office.

Section 6. Resignation. A Director may resign at any time by providing written notice to the Chair (or if the Chair is resigning, or if the Chair's office is vacant, then to the next highest-ranking Officer). The resignation shall be effective when communicated unless the notice specifies a later effective date or subsequent event upon which it will become effective.

Section 7. Board Vacancies. A vacancy in the Board may be filled by the remaining members of the Board as provided in Section 2 of this Article. An individual appointed to fill a vacancy other than by expiration of a term shall be appointed for the unexpired term of the vacating Director.

Section 8. Compensation. A Director shall serve as a volunteer without compensation. By resolution of the Board, Directors may be reimbursed for their reasonable expenses incident to their duties in accordance with applicable law.

#### *ARTICLE V — MEETINGS OF DIRECTORS*

Section 1. Annual Meeting. The Board shall hold an annual meeting for the purpose of electing Directors and officers of the Corporation and the transaction of such other business as may be properly brought before the Board. If the annual meeting is not held as designated by these Bylaws, a substitute annual meeting may be called by or at the request of the Board, and such meeting shall be designated and treated for all purposes as the annual meeting. The Board may set a schedule of the time and place for the holding of regular meetings.

Section 2. Special Meeting. Special meetings of the Board may be called by or at the request of the Chair or any two (2) Directors.

Section 3. Open Meetings and Public Records Laws. All meetings of the Board shall at all times be in compliance with Article 33C of Chapter 143 (Open Meetings) and Chapter 132 of the North Carolina General Statutes as modified by Chapter 166A of the North Carolina General Statutes.

Section 4. Place of Meetings. Meetings of the Board may be held at the principal office of the Corporation or at such other place, either within or without the State of North Carolina, or remotely in accordance with Section 19.24 of Chapter 166A of the North Carolina General Statutes, as shall either: (a) be designated in the notice of the meeting; or (b) be agreed upon at or before the meeting by a majority of the Directors then in office.

Section 5. Notice of Meetings; Waiver. Subject to the requirements Article 33C of Chapter 143 (Open Meetings) of the North Carolina General Statutes as modified by Chapter 166A of the North Carolina General Statutes, the Secretary or other person or persons calling a meeting for which notice is required shall give notice by any usual means of communication at least seven (7) days before the meeting, provided that with respect to special meetings, only forty-eight (48) hours advance notice is required, and provided further emergency meetings may be held immediately after notice to all Board members. Unless otherwise indicated in the notice, any and all business may be transacted at a meeting of the Board. A Director may waive notice

of any meeting by written statement, facsimile or electronic mail sent by the Director, signed before or after the holding of the meeting. The attendance of a Director at a meeting constitutes a waiver of notice of such meeting, except where the Director attends the meeting for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened.

Section 6. Quorum. A majority of the Directors in office immediately before a meeting begins shall constitute a quorum for the transaction of business at a meeting of the Board.

Section 7. Manner of Acting. The act of the majority of the Directors then in office at a properly noticed and conducted meeting at which a quorum is present shall be the act of the Board, except as otherwise provided by law.

Section 8. Meeting by Telephone Conference, Video Conference or Other Method Simultaneous Communications. Any one or more Directors or members of a committee may participate in a meeting of the Board of committee by means of a telephone conference, video conference or similar methods of simultaneous communications which allows all Directors participating in the meeting to simultaneously hear each other during the meeting, and such participation in a meeting shall be deemed presence in person at such meeting. If the Board holds a meeting by use of telephone conference or video conference, it shall provide a location and means whereby members of the public may listen to the meeting, and the notice of the meeting shall be provided as required by Article 33C of Chapter 143 (Open Meetings) of the North Carolina General Statutes as modified by Chapter 166A of the North Carolina General Statutes.

Section 9. Action by Written Consent. Subject to the requirements Article 33C of Chapter 143 (Open Meetings) of the North Carolina General Statutes as modified by Chapter 166A of the North Carolina General Statutes, a majority of the Directors or members of a committee may take action at a duly called Open Meeting by written consent signed by all of the Directors or of the committee present at such meeting, as the case may be, and filed with the minutes of the proceedings of the Board or committee.

#### *ARTICLE VI — COMMITTEES*

Section 1. Committee Authority. The Board, by resolution, may designate one or more committees. Each committee shall consist of one or more Directors elected by the Board and shall have such powers as may be delegated by the Board, except that no committee may: (i) authorize distributions to or for the benefit of Directors or officers; (ii) approve dissolution, merger or the sale, pledge or transfer of all or substantially all of the Corporation's assets; (iii) elect, appoint or remove Directors, or fill vacancies on the Board or on any of its committees, (iv) elect officers, (v) adopt, amend, or repeal the Articles or Bylaws, or (vi) take any action the Board cannot lawfully delegate under the Articles, Bylaws or applicable law.

Section 2. Committee Conduct. Each committee shall fix its own rules governing the conduct of its activities and shall make such reports to the Board of its activities as the Board may request. The provisions in Article V, Sections 3 through 7 applicable to meetings of the Board shall apply to meetings of committees.

*ARTICLE VII — OFFICERS OF THE BOARD*

Section 1. Number and Titles. The officers of the Board (the “Officers” or the “Officer”) shall be a Chair, Vice Chair, Secretary, and Treasurer. The Board may also elect one or more Assistant Treasurers and one or more Assistant Secretaries and such other Officers as it shall 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. 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.

Section 2. Election and Term of Office. The Officers shall be elected by the Board at the annual meeting. If the election of Officers is not held at the annual meeting, the election shall be held as soon thereafter as may be convenient. Each Officer shall hold office until the next annual meeting and until a successor is elected and qualifies.

Section 3. Removal. Any Officer elected or appointed by the Board may be removed at any time by the Board with or without cause.

Section 4. Resignation. An Officer may resign at any time by providing written notice to the Chair (or if the Chair is resigning or if the Chair’s office is vacant, then to the Officer holding the next highest office). The resignation shall be effective when it is communicated unless it specifies in writing a later effective date.

Section 5. Vacancies. A vacancy in any office shall be filled by the Board for the unexpired portion of the term.

Section 6. Chair. The Chair shall be a member of the Board and shall preside at all meetings of the Board. The Chair shall sign, with any other proper Officer, instruments which may be lawfully executed on behalf of the Corporation, except where required or permitted by law to be otherwise signed and executed, and except where the signing and execution shall be delegated by the Board to some other Officer. The Chair shall, in general, perform all duties incident to the office of Chair as may be prescribed by the Board from time to time.

Section 7. Vice Chair. The Vice Chair shall be a member of the Board and shall exercise the powers of the Chair during that Officer’s absence or inability to act. Any action taken by a Vice Chair in the performance of the duties of the Chair shall be presumptive evidence of the absence or inability to act of the Chair at the time the action was taken. The Vice Chair shall have such powers and perform such other duties as from time to time may be assigned to the Vice Chair by the Chair or by the Board.

Section 8. Secretary. The Secretary shall be a member of the Board and shall be responsible for: (a) keeping the minutes of the Board meetings; and (b) seeing that all notices are duly given in accordance with the provisions of these Bylaws or as required by law. 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 duties incident to the office of Secretary and other duties as from time to time may be assigned to the Secretary by the Chair or the Board.

Section 9. Treasurer. The Treasurer shall be a member of the Board and shall: (a) have charge and custody of and be responsible for all funds and securities of the School; (b) keep accurate books and records of receipts and disbursements; (c) deposit all moneys and securities received by the Corporation in such banks, trust companies or other depositories as shall be selected by the Board; and (d) see that all required corporate filings are made. The Treasurer shall, in general, perform all duties incident to the office of Treasurer and such other duties as from time to time may be assigned to the Treasurer by the Chair or by the Board.

Section 10. Assistant Secretaries. Each Assistant Secretary shall have such powers and perform such duties as may be assigned by the Board, and the Assistant Secretaries shall exercise the powers of the Secretary during that Officer's absence or inability to act.

Section 11. Assistant Treasurers. Each Assistant Treasurer shall have such powers and perform such duties as may be assigned by the Board, and the Assistant Treasurers shall exercise the powers of the Treasurer during that Officer's absence or inability to act.

Section 12. Compensation. Officers, who are Directors, may not be compensated for their services as Officers. By resolution of the Board, Officers may be reimbursed for reasonable expenses incident to their duties in accordance with applicable law.

*ARTICLE VIII — CONTRACTS, LOANS, CHECKS AND DEPOSITS;  
SPECIAL CORPORATE ACTS; GENERAL PROVISIONS*

Section 1. Contracts. The Board may authorize any one or more Officers to enter into any contract, or other instrument on behalf of the Corporation. Such authority may be general or confined to specific instances. When the Board authorizes the execution of a contract or of any other instrument in the name of and on behalf of the Corporation, without specifying the executing Officers, the Chair or Vice Chair, and the Secretary or Treasurer may execute the same.

Section 2. Loans. No loans shall be contracted on behalf of the Corporation and no evidences of indebtedness shall be issued in its name unless authorized by a resolution of the Board.

Section 3. Checks, Drafts, Orders for Payment. All checks, drafts or other orders for the payment of money, notes or other evidences of indebtedness issued in the name of the Corporation shall be signed by such Officer or Officers of the Corporation as shall from time to time be determined by resolution of the Board.

Section 4. Deposits. All funds of the Corporation shall be deposited from time to time to the credit of the Corporation in such banks, trust companies or other depositories as the Board may select.

Section 5. Voting of Gifted, Bequested or Transferred Securities Owned by the Corporation. Subject to the specific directions of the Board, any shares or other securities issued by any other corporation and owned or controlled by the Corporation may be voted at any meeting of security holders of such other corporation by the Chair or by proxy appointed by the Chair.

Section 6. Conflict of Interest. A Director shall inform the Board of any direct or indirect conflict of interest which the Director has with regard to any transaction contemplated by the Board (a “Conflict of Interest”). A Conflict of Interest shall exist in Board actions including, but not be limited to, actions concerning a transaction in which the Director: (a) has a material financial interest; or (b) 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 with a Conflict of Interest may participate in the discussion, but may not vote on the transaction. The transaction is authorized, approved, or ratified by the vote of a majority of the Directors in office who have no Conflict of Interest (which must be more than one Director) and when a majority of Directors who have no Conflict of Interest so vote, a quorum is deemed to be present at the meeting for purposes of that vote.

Section 7. Contracts Between the Corporation and Related Persons. The Corporation may not enter into a contract with a related person to the extent such contract and any transfers in connection therewith might cause or imply private benefit under the relevant sections of the Code, and applicable provisions of state ethical requirements for local government officials.

#### *ARTICLE IX— INDEMNIFICATION*

It shall be the policy of the Corporation to indemnify to the maximum extent permitted by Chapter 55A of the General Statutes of North Carolina each person who is or was a Director, Officer or member of a committee of the Board and each person who serves or has served at the request of the School as a trustee, Director, Officer, partner, employee of any other corporation, partnership, joint venture, trust or other enterprise. The Corporation may purchase and maintain insurance on behalf of any such person against any liability asserted against and incurred by such person in any such capacity or arising out of his/her status as such, whether or not the Corporation would have power to indemnify such person against such liability under the preceding sentence. The Corporation may, to the extent authorized from time to time by the Board, grant rights to indemnification to any employee of the Corporation. Notwithstanding any provision of this Article to the contrary, the Corporation shall not indemnify any person described in this Article if: (a) such indemnification would jeopardize the Corporation’s tax-exempt status under Code Section 501(c)(3); or (b) the Corporation is determined to be a private foundation for federal income tax purposes, and such indemnification would cause the imposition of the federal excise tax for self-dealing under Code Section 4941 or for making a taxable expenditure under Code Section 4945. The Corporation may advance expenses in connection with any proceeding to 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 this Article shall be deemed a proper expense of the Corporation.

#### *ARTICLE X — FISCAL YEAR*

The fiscal year of the Corporation shall begin on the first day of July in each year and end on the following June 30; provided that the first fiscal year shall begin on the date of incorporation.

*ARTICLE XI — DISPOSITION OF ASSETS*

Upon the dissolution of the Corporation, the Board shall after paying or making provision for the payment of all of the liabilities of the Corporation, dispose of all of the remaining assets of the Corporation in accordance with the Articles, or if no provision is made in the Articles for the distribution of assets, then to other charitable or governmental entities that are organized to operate as a public charter school in North Carolina, unless otherwise required by applicable law.

*ARTICLE XII — NON-DISCRIMINATION*

The public charter school operated by the Corporation shall permit students of any race, religion, color, ethnicity, socio-economic status and national origin to all the rights, privileges, programs, and activities generally accorded or made available to students at the charter school.

*ARTICLE XIII — AMENDMENTS*

These Bylaws may be amended or repealed and new Bylaws may be adopted by the affirmative vote of a majority of the Directors in office at any regular or special meeting of the Board provided, that notice of the meeting shall have been given which states that the purpose or one of the purposes of the meeting is to consider a proposed amendment to the Bylaws and includes a copy or summary of the proposed amendment or states the general nature of the amendment. Such notice may be waived as provided in these Bylaws.

\* \* \* \* \*

**SECRETARY'S CERTIFICATE**

This is to certify that the foregoing Bylaws of High Point Preparatory Academy were duly adopted by resolution of the Board effective as of the 2<sup>nd</sup> day of March, 2022.

IN WITNESS WHEREOF, the undersigned, the duly elected and acting Secretary, has signed this Secretary's Certificate.

This the 2<sup>nd</sup> day of March, 2022.

  
James McNeil, Secretary



# Appendix H: Charter School Board Member Response and Resume

## High Point Preparatory Academy

### 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: High Point Preparatory Academy
2. Full name: Kellie J. Jackson

Home Address: 3415 Langdale Dr. High Point, NC 27265

Business Name and Address:

Telephone No.: 336-471-7236

E-mail address: kellie780@gmail.com

3. Brief educational and employment history.

**Ed. D.** Educational Leadership/Instructional Leadership Concentration

**M. Ed.** Master of Elementary Education with K-12 Literacy Concentration

**B.A.** Bachelor of Arts in Elementary Education (K-6)

#### Additional Licensure:

School Superintendent License

Middle Grades English/Language Arts

#### Additional Certifications:

National Board Certification (Early & Middle Childhood Literacy)

Certified Professional Learning Facilitator (NBPTS)

Certified K-12 Reading Specialist

**EMPLOYMENT:** Instructional Coach, Lead Teacher Mentor, University Teacher Prep Supervisor, District Professional Development Organizer/Presenter, Summer School Coordinator, Elementary Teacher (and Virtual), Middle School Teacher (and Virtual), Reading Recovery Middle School Teacher/Remedial Teacher, School Site Testing Coordinator

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?

As the founder of High Point Preparatory Academy, I recruited members who will be known as the founding board of directors. I began the recruitment process after reviewing the North Carolina State Board of Education requirements for starting a public charter school. After extensive research, webinars, and board development participation, I developed a recruitment letter to distribute to influential leaders within High Point community. The recruitment process was very intentional. I sought out those with school board expertise, school leadership expertise, and community development experience. In addition to seeking a diverse group of board members, I also held informal "interviews" regarding their thoughts on starting a public charter school in the city of High Point.

Serving as a member of the founding board of directors for High Point Preparatory Academy increases the effectiveness to carry out the mission of the charter. In addition to the school mission, I seek to promote and support strong public school governance, to ensure our charter school has the basic needs (community support, funding, common goal) to improve student achievement.

6. What is your understanding of the appropriate role of a public charter school board member?

I understand the role of a public charter school board member involves being an exceptional leader who relentlessly focuses on student achievement, acts intentionally and strategically, is accountable and expects accountability in others, raises and uses resources wisely, ensures the [SMART] goals, education plan, and charter school budget, align with the mission and vision of the charter school. Additionally, the role includes understanding and adhering to bylaws developed by the existing board.

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.

Currently, I serve on High Point Citizens Advisory Council At-Large. I am an active participant of the Neighborhood Leadership Committee for the city of High Point. I also currently serve on the NBCT/NCAE Caucus Board Member At-Large. I completed certification for United Way of Greater High Point- Project Board Member Development.

I have experience as leader and member of on-site school leadership teams (elementary and middle). I have served on School Parent Teacher Association Boards (PTA) as a member as well as Vice President.

8. Describe the specific knowledge and experience that you would bring to the board.
- As founder of the charter school, my knowledge and experience as an Instructional Leader, Teacher Leader, community leader, and overall Educational Leader has prepared me to be an effective founding board member. This preparation includes the ability to actively promote: 21<sup>st</sup> century teaching and learning expectations, technology integration that fosters student learning, a challenging academic curriculum, data-driven decision making, standards-based instruction, learning and assessment, instructional excellence with high expectation for professional collaboration, professional learning communities, focused professional development, a higher order/critical thinking environment for students while balancing the need for test preparation to meet standardized testing goals and requirements, and a nurturing learning environment. My commitment as the role model for both the adult and student community, a lifelong learner, desire to mentor new teachers, and advocate for student equity will all add to the effectiveness of the board.

### **School Mission and Program**

1. What is your understanding of the school's mission and guiding beliefs?  
*The mission of High Point Preparatory Academy is to empower all scholars to become collaborative (work together towards a common goal=problem-solving tasks), successful, and responsible citizens by fostering strong literacy skills (strengthened literacy skills increases student chances for success and breeds citizens who take responsibility for not only their immediate community, but also the surrounding communities and globally). HPPA will work to implement a rigorous academic program (academic program that aligns with North Carolina Standard Course of Study) and moral focused curriculum (will include character development curriculum) within a social and emotional supportive environment (will include CASEL- Social and Emotional Learning). HPPA will be known as a school where we believe that strong literacy skills are essential in developing responsible, self-motivated (inspired) learners. We nurture creativity, (include STEM opportunities), compassion (Culturally Responsive Teaching and Inclusivity), and empathy through thoughtful collaborative learning and a challenging curriculum.*
2. What is your understanding of the school's proposed educational program?  
 It is my understanding that the proposed educational program must include an academic calendar that includes a minimum of 185 instructional days, the curriculum should align with North Carolina Standard Course of Study since this is the basis for the

statewide testing program and Accountability Program (EOGs and EOCs). The plan should include information for teaching students who are "At-Risk" for failure, students who speak English as a second language and exceptional children.

3. What do you believe to be the characteristics of a successful school?

I believe a successful school:

- has a highly effective school board with highly effective board members
- focuses relentlessly on student achievement
- recruits and retains an exceptional leader
- recruits and retains exceptional teachers and staff
- invests in exemplary professional development and curricula
- acts strategically and is accountable
- is goal oriented and data driven
- promotes innovation
- improves student learning
- increases learning opportunities for all students

4. How will you know that the school is succeeding (or not) in its mission?

The board will develop a strategic long-term plan with short-term benchmarks to ensure the school stays on a path toward fulfilling its mission and vision. To stay informed of the school's progress or success in the mission, the school board will include line items in the agenda addressing current academic data and determine whether or not the school is meeting measurable student achievement results identified within the SMART Goals and the school improvement plan.

## **Governance**

1. Describe the role that the board will play in the school's operation.

High Point Preparatory Academy public charter school will be governed by the board of directors. The board is legally responsible for all transactions of the charter school. The board governs through its adopted policies and clear evaluative metrics. Its primary duties are to ensure that:

- a. The academic programs are successful
- b. The school's operational programs comply with all terms of its charter
- c. The school is compliant in all statutory and regulatory requirements
- d. The school is financially solvent
- e. Competent, professional staff are hired to carry out the operational plan

At every meeting, the board should discuss the financial stability, academic standing, and any compliance situations to ensure it is making adequate progress towards renewal.

2. How will you know if the school is successful at the end of the first year of operation?  
HPPA students will participate in state-required assessments. HPPA will comply with the North Carolina Accountability Model. Prior to the end of the first year, students will participate in regular formative and summative assessments, and Quarterly Benchmarks that inform teachers of student progression towards standard mastery. At the end of the first year, all eligible students will take End-of-Grade tests. Data obtained from assessments will be used to set/amend SMART goals for the coming year. The board will develop a strategic long-term plan with short-term benchmarks to ensure the school stays on a path toward fulfilling its mission and vision.
  
3. How will you know at the end of five years of the schools is successful?  
All eligible students will take End-of-Grade tests. Data results from these assessments will be analyzed, compared, to identify patterns of success and improvement, then shared with all stakeholders to make sure the school is meeting academic goals. The board will develop a strategic long-term plan with short-term benchmarks to ensure the school stays on a path toward fulfilling its mission and vision.
  
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
  - Ensure all stakeholders understand the focus is on student achievement
  - Recruits an exceptional leader, teachers, and staff
  - Accurately vet and Invest in exemplary professional development and curricula
  - Ensure stakeholders act strategically and is accountable
  - Ensure stakeholders are goal oriented and data driven (SMART goals)
  
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?  
The board will have established polices (Bylaws) for handling board members who are not productive. I would adhere to the decisions agreed upon in the written bylaws and the board policy manual.

\*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, Kellie Jackson, 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 High Point Preparatory Academy Charter School is true and correct in every respect.

Signature Kellie Jackson  
Date 3/2/22

**Kellie J. Jackson**

3415 Langdale Dr.  
High Point, NC 27265

(336) 471-7236  
[kellie780@gmail.com](mailto:kellie780@gmail.com)

**EDUCATION**

- Ed. D.** August 5, 2020, High Point University: Educational Leadership/Instructional Leadership Concentration
- M. Ed.** May 8, 2011, High Point University: Master of Elementary Education with K-12 Literacy Concentration
- B.A. Elementary Education** May 8, 2000, High Point University, High Point, NC

**PROFESSIONAL EXPERIENCE**

- **Middle School Virtual Educator**, September 2021-present, Guilford eLearning University Prep (GCS).
- **Elementary Teacher**, March 2021-September 2021, Guilford eLearning Virtual Academy.
- **Testing Coordinator/Instructional Coach**, August 2020-March 2021, Guilford County Schools: Pruette SCALE Academy.
- **University Supervisor/Adjunct Professor**, August 2019-present (on leave), High Point University: Stout School of Education PREPARE TQP Federal Program; Coaching Culturally Responsive Pedagogy to Teacher Residents.
- **Academic (Instructional) Coach**, August 2017- 2019, Turrentine Middle School, Burlington, NC.
- **Reading Specialist/ELA-8**, August 2013-July 2017, Ferndale Middle School, High Point, NC.
- **Reading Specialist/Guided Reading Teacher**, August 2011-2013, Hairston Middle School, Greensboro, NC.
- **Teacher**, April 2000-August 2011, Shadybrook Elementary School, High Point, NC.
- **Pre-K Teacher Assistant**, December 1997-April 2000, Gateway Education Center, Greensboro, NC.

**ADDITIONAL EXPERIENCE**

- Lead Mentor and Instructional Leader (Academic Coach), Turrentine Middle School, August 2017-2019.
- North Carolina Association of Educators (NCAE) National Board Certified Teacher (NBCT) At-Large Member of Executive Board, March 2019-present.
- Elected Region 4 NCAE 2019 Convention Delegate.
- Presenter and Professional Learning Facilitator (PLF) at annual NCAE boot-camp for initial NBCT candidates, February 2019.
- After School Tutoring Program Coordinator, Turrentine Middle School, March 2018-May 2018.
- Appointed Summer School Coordinator, Turrentine Middle School, June 2018.
- Presenter at Network to Transform Teaching (NT3) Summit, June 2018.
- Selected Alamance-Burlington School System in Teacher Leadership Academy, March 2018, and Cohort Graduate and Graduation Speaker, March 2019.
- Selected for NCAE Instructional Leadership Institute, 2018 Cohort (current participant).
- Facilitator/Presenter at NCAE/NT3 Summit, March 2017.
- Presenter at High Point University Middle School Mini-Summit, July 2017.
- National Board Professional Teaching Standards (NBPTS) Assessor for Pearson Testing, June-July 2014 and June-July 2017.
- Vice President of Parent Teacher Association, Shadybrook Elementary School, 2014.
- Recipient of Valued Volunteer Award from Guilford County Schools Parent-Teacher-Association, 2014.
- Program Organizer/Presenter Bully Prevention 1-Day Camp @ Boys & Girls Club of Greater High Point, Summer 2014.
- Recipient of Distinguished Service Award from Guilford County Schools, November 2011.
- Certified Guilford County Schools Mentor for New Teachers, June 2011.
- Seventh Grade Level Leadership Team member, August 2011.
- Chairperson for Multicultural Committee, April 2010.
- Grade Level Lead Teacher (first grade); Grade Level Lead Teacher (second grade), 2006-2009.
- School Leadership Team member, 2007.

**OTHER**

- Speaker, RemoteK12: The Connected Teacher Summit – Culturally Responsive Teaching during Remote Learning, January 2021.
- Speaker, Education Matters, WRAL-TV – Benefits of National Board Certification, December 2020.
- National Board Certification in Early and Middle Childhood Literacy: Language Arts, 2011.
- K-12 Certified Reading Specialist.
- National Board Certified Teacher Candidate Coach-Certified.
- North Carolina Association of Educators (NCAE) National Board for Professional Teaching Standards (NBPTS) Professional Learning Facilitator (PLF)-certified.

**COMMUNITY INVOLVEMENT**

- High Point City Citizens Advisory Council Member (At-Large), Summer 2021-present.
- Project Board Development Completion/African American Initiative Member.
- United Way of Greater High Point – 2022 Annual Program Review Team (Education Grant Review Panel).
- Point-In-Time Ending Homelessness Project volunteer, January/February 2022.
- Project In-As-Much (assisting neighbors with home improvement).
- 2022 Project Grant Development Reviewer for High Point Agencies.
- Neighborhood Leadership Committee Member (CAC Representative).
- Bully Prevention Host at Boys & Girls Club, Summer 2018.

### 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: High Point Preparatory Academy
2. Full name: Gloria Jackson

Home Address: 908 Northshore Court, High Point, NC 27265

Business Name and Address: Triad Child Development Center, 311 Old Winston Road, High Point, NC 27265

Telephone No.: 336-558-7150

E-mail address: gwjackson88@yahoo.com

3. Brief educational and employment history.  
My educational background includes a Bachelor of Science degree from Claflin University and a Master of Education degree from South Carolina State University. I am the executive director and owner of Triad Child Development Center in High Point. I have over 30 years of hands-on experience in the early childhood field.
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:

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?  
Dr. Kellie Jackson recruited me to serve on the Board of High Point Preparatory Academy. I met her several years ago while I was teaching her son. I wish to serve on the Board of Directors because connecting with students is a passion of mine.
6. What is your understanding of the appropriate role of a public charter school board member?  
I understand the importance of governing High Point Prep to be a quality educational choice for all families in the area. Our board will examine teacher performance and the programs the school offers to ensure we are serving our students to the highest extent possible.
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 other non-profit boards including Big Brother Big Sisters and the YWCA. I also have knowledge and experience working with children as the owner and executive director of Triad Child Development Center.
8. Describe the specific knowledge and experience that you would bring to the board.  
The knowledge that I bring to the board is my experience with managing a childcare center, financial management, and operations.

### **School Mission and Program**

1. What is your understanding of the school's mission and guiding beliefs?  
High Point Preparatory Academy will empower students to be collaborative and responsible citizens by implementing a rigorous curriculum.
2. What is your understanding of the school's proposed educational program?  
Our school will implement National Heritage Academies' educational program that is centered on four pillars. This educational program is in place and has proven successful at other NHA-partner schools.
3. What do you believe to be the characteristics of a successful school?  
I believe a successful school starts with good leadership and provides students and staff with the tools they need to thrive.
4. How will you know that the school is succeeding (or not) in its mission?  
Success of our school will be shown over time. Some key indicators will be students succeeding in high school and college, staff turnover, and the environment of our school.

## Governance

1. Describe the role that the board will play in the school's operation.  
As a board member, I will provide feedback on the curriculum and the hiring of staff. Our board will rely on National Heritage Academies for the daily operations of our school.
2. How will you know if the school is successful at the end of the first year of operation?  
Success after our first year of operation will be indicated by low staff turnover and the number of returning students.
3. How will you know at the end of five years of the schools is successful?  
If our school is steadily increasing enrollment, it will be an indication of success at the end of five years.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?  
To be successful, our board will prioritize working together with NHA, the principal, families, and the community.
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 believe that all board members should be held to a high standard to act ethically. If an unethical situation comes to my attention, I will raise the matter to the board chair to have a discussion and work on how the issue can be solved.

\*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, Gloria Jackson, 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 High Point Preparatory Academy Charter School is true and correct in every respect.

Signature Gloria Jackson

Date 3-2-22

**Gloria Jackson** is the executive director and owner of Triad Child Development Center in High Point. She has over thirty years of hands-on experience in the early childhood field.

She currently teaches a North Carolina Pre-K class, where her classroom serves as a demonstration site. She developed an interest in the early childhood field after looking for childcare for her daughter. She loves incorporating project-based learning with the children in her classroom.

Her educational background includes a Bachelor of Science degree from Claflin University and a Master of Education degree from South Carolina State University. She received professional certification birth-kindergarten from North Carolina A & T State University.

She is active in a variety of civic and cultural organizations, including Alpha Kappa Alpha Sorority, Incorporated, Ivy Hands Foundation, Treasurer, Graduate Advisor for Sigma Mu Chapter of Alpha Kappa Alpha Sorority at High Point University, The Links Inc., Winston Salem Chapter, Top Ladies of Distinction, Guilford Chapter, 2nd Vice President and a member of the North Carolina Association for the Education of Children and Kappa Delta Pi.

She has also served on the YWCA of High Point Board, New Bridge Bank Board, Big Brothers Big Sisters Board, High Point Junior League, Guilford County Partnership for Children Board, Facet Chairman for, International Trends and Services for the Winston-Salem chapter of The Links, Inc., Greensboro Chapter of Jack and Jill of America, Teen Advisor.

She has dedicated herself to becoming a life-long educator and learner, and she strives to instill a similar desire in all the students and teachers with whom she works. As an educational leader and advocate, she mentors other teachers.

### 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.*

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#### Background

1. Name of charter school on whose Board of Directors you intend to serve: High Point Preparatory Academy

2. Full name: James E. McNeil

Home Address: 4208 Brambletye Drive, Greensboro, NC 27407

Business Name and Address: Retired

Telephone No.: 941-400-0197

E-mail address: jmcneil6620@gmail.com

3. Brief educational and employment history.

I hold a Bachelor of Science in Elementary Education from Winston-Salem State University and a Master of Arts in Administration and Supervision from University of D.C. I am a retired principal and educator. Most recently, I worked for Guilford County Schools as a principal.

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:

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 know Dr. Jackson from the High Point community. I believe that High Point needs to expand educational resources for all students, but especially the minority population.

6. What is your understanding of the appropriate role of a public charter school board member?  
I believe a member of a charter school board must focus on providing a high level of accountability and governance with regard to the school's academics, finances, and operations.
  
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 previously served on the Board of Directors at Phoenix Academy for two years. Additionally, I have served on several boards including the Foundation Board of Winston-Salem State University, the Board of Directors for High Point Children's Museum, and Visit High Point.
  
8. Describe the specific knowledge and experience that you would bring to the board.  
The knowledge I will bring to this board includes my many years as a teacher and principal in addition to my time serving on the Board of Directors at Phoenix Academy. I understand the importance of strong school leaders and teachers.

### **School Mission and Program**

1. What is your understanding of the school's mission and guiding beliefs?  
High Point Preparatory Academy strives to empower scholars to be successful and responsible students by implementing a rigorous curriculum with a moral focus component.
  
2. What is your understanding of the school's proposed educational program?  
High Point Preparatory Academy will prepare students for high school and college. Our educational program will be aligned to state standards and include a character-building moral focus program.
  
3. What do you believe to be the characteristics of a successful school?  
Some aspects of a successful school would include accountability, student centered curriculum, and prepared teachers in each classroom.
  
4. How will you know that the school is succeeding (or not) in its mission?  
Our school will know if we are succeeding in our mission if we are receiving positive parent feedback on our yearly survey and achieving growth on our state report card.

### **Governance**

1. Describe the role that the board will play in the school's operation.  
As a former principal and member of a charter school board, I understand that our board will be responsible for governance including overseeing finances, academics, and

operations. We will delegate daily operations of the school to our management partner, National Heritage Academies.

2. How will you know if the school is successful at the end of the first year of operation?  
Solid academic and financial performance will indicate success in our first year of operation.
3. How will you know at the end of five years of the schools is successful?  
At the end of five years, test results will help demonstrate the success of our school. Our charter goals will also help our board monitor our progress.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?  
Our charter school board will implement policies, strategies, and best practices to ensure High Point Prep is successful.
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?  
If situations arise in which one or more board members were acting unethically, I will bring the issue to the attention of the board chair.

\*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, James E. McNeil, 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 High Point Prep Academy Charter School is true and correct in every respect.

Signature James E. McNeil  
 Date 11 April 22

## James E. McNeil

4208 Brambletye Drive., Greensboro, NC 27407

PHONE: 336-292-2748 \* CELL: 941-400-0197 \* E-MAIL: jmcneil6620@gmail.com

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### EDUCATION

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#### Graduate, Superintendents Academy, 2011

Mr. McNeil is a graduate of the **SUPES Academy**, a comprehensive leadership development experience, with a proven, dynamic curriculum designed to prepare outstanding, transformative superintendents for our nation's school systems.

#### Master of Arts-Administration and Supervision, University of D.C., 1972

**Eighty-five** graduate hours beyond the master's degree, 1972 – Present

#### Bachelor of Science, Elementary Education, Winston-Salem State Univ., 1967

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### PROFESSIONAL EXPERIENCE

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#### Guilford County Schools, Greensboro, NC

**2011 – 2015 (Retired)**

##### Principal of Union Hill Elementary School

As principal of Union Hill Elementary School, I am the chief administrator in developing and implementing policies, programs, curriculum activities, and budgets in a manner that promotes the educational development of each student and the professional development of each staff member. The new Common Core Standards are being implemented at Union Hill. Union Hill has had high growth and /or expected growth each year of my tenure as principal.

#### Guilford County Schools, Greensboro, NC

**2007 - 2011**

##### Principal of Florence Elementary School, a school of distinction for four consecutive years

As principal of Florence Elementary School, I was the chief administrator in developing and implementing policies, programs, curriculum activities, and budgets in a manner that promotes the educational development of each student and the professional development of each staff member. Florence School has an enrollment of 875 students k-5. Our school was recognized as one of the most improved schools in Guilford County for SY 2010-2011. Our students earned a composite score of 85% on the EOG Tests.

#### South Africa BookSmart Foundation

**2001 – 2007**

**Executive Director:** I was responsible for fund raising activities, securing books from public and private donors, managing the warehouse operation, coordinating the shipment of books to Africa; establishing a relationship with government agencies and dignitaries in those areas where books are shipped. I provided consultation on educational issues to government officials and dignitaries.

2000 – 2001	<b>Principal,</b> Larissa American School (K-8), Larissa Greece
1997 – 2000	<b>Principal,</b> Garmisch American School (K-8) Garmisch, FRG
1994 – 1997	<b>Principal,</b> Livorno Unit School (K-12) Livorno, Italy
1988 – 1994	<b>Principal,</b> Oslo Elementary/ Junior High School (k-9), Oslo Norway
1985 – 1988	<b>Principal,</b> Schwaebisch Gmuend Elementary/ Junior High School, Germany
1981 – 1985	<b>Principal,</b> Bad Aibling Elementary/ Junior High School, Germany
1976 – 1981	<b>Assistant Principal,</b> Mannheim, Germany and Bahrain
1975 – 1976	<b>Teacher,</b> Mainz Germany and Okinawa
1974 – 1975	<b>Math Teacher,</b> D.C Public Schools, Washington D.C.
1967 – 1974	Teacher, D.C. Public Schools, Washington D.C.

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### PROFESSIONAL ACTIVITIES & COMMUNITY

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- Past Member Board of Visitors, Winston-Salem State University
- Past Member: Board of Directors, Do Unto Others (DUO)
- Member: International Program Advisory Board, Winston-Salem State University
- Past Member: Board of Directors, National Conference for Community and Justice (NCCJ)
- Past Member: Board of Directors, The North Carolina Shakespeare Festival
- Past Member: Board of Directors, Family Services of the Piedmont
- Past Member: Board of Directors, Guilford Education Alliance
- Past member: Board of Directors, Carl Chavis YMCA
- Member: Foundation Board, Winston-Salem State University
- Member: Board of Directors, High Point Children's Museum

### 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: High Point Preparatory Academy
2. Full name: William E. Price, Jr.

Home Address: 914 North Shore Court, High Point, NC 27262

Business Name and Address: Price Commercial Properties, Hinkle Price & Cole Commercial Management, 1220 N. Main Street, High Point

Telephone No.: 336-878-7575

E-mail address: [edprice@edpricetriad.com](mailto:edprice@edpricetriad.com)

3. Brief educational and employment history.  
I graduated from Wake Forest University with a bachelor's degree in business administration. I have spent my career working as a real estate broker for the past 46 years.
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:

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 met Dr. Jackson many years ago. She recruited me to serve on the Board of Directors for High Point Preparatory Academy. I have a compassion for youth and their educational growth.

6. What is your understanding of the appropriate role of a public charter school board member?  
I believe an appropriate school board member will act in a way to benefit the students, board, and the greater community we serve.
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 experience serving on the Guilford County Schools Board of Education, doing so for eight years. I currently serve on a number of non-profit boards and the Guilford County Board of Equalization and Review.
8. Describe the specific knowledge and experience that you would bring to the board.  
I will bring my knowledge of governing from the many other boards that I serve on in our local community.

### **School Mission and Program**

1. What is your understanding of the school's mission and guiding beliefs?  
High Point Prep will prepare students with the academic skills and personal development to be successful in high school, college, and life.
2. What is your understanding of the school's proposed educational program?  
Our school will partner with National Heritage Academies. High Point Prep intends to use the organization's educational program that focuses on students first and is founded upon four pillars: parent partnership, academic excellence, student responsibility, and moral focus.
3. What do you believe to be the characteristics of a successful school?  
A safe school culture, accountability, and rigorous curriculum are a few characteristics of a successful school.
4. How will you know that the school is succeeding (or not) in its mission?  
Our school's success will be measured by student assessments, and input from staff and parents from our twice a year survey.

### **Governance**

1. Describe the role that the board will play in the school's operation.  
Our board will ensure that our school is succeeding in its mission and vision. In addition, we will review financial statements and academic standards.
2. How will you know if the school is successful at the end of the first year of operation?  
Student performance data and feedback from staff and parents will provide us with insight on if the school is successful at the end of the first year of operation.

3. How will you know at the end of five years of the schools is successful?  
Data such as the wait list, reenrolling students, and end of year testing demonstrate success at the end of five years.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?  
We will ensure our staff is properly trained, our finances are properly handled, and resources are provided to students and families for educational growth.
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 raise the issue to our board chair to ensure the board proceeds properly. I believe the issue should be discussed with the board and, if necessary, the legal counsel to act accordingly.

\*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, Ed Price, 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 High Point Preparatory Academy Charter School is true and correct in every respect.

Signature William E Price  
Date 3/15/22

Price Commercial Properties  
Hinkle Price & Cole Commercial Management  
1220 N. Main St. | P.O. Box 5865  
High Point, NC 27262  
Office | 336.812.3175  
Fax | 336.812.3164

William E. Price, Jr.

**Personal:** Lifetime resident of High Point where he has a special affection for caring for his city. His compassion for the youth, their education and growth, citizens who may be dealing with oppression and challenging personal issues, and creating real estate solutions for housing and successful business deals are some of the daily issues where he applies his time, energy and resources.

**Family:** Wife Terri; 3 adult children; 6 grandchildren

**Education:** Bachelor's degree in Business administration, Wake Forest University; High Point Central High School.

**Occupation:** Real Estate Broker for 46 years; Voted the Triad's Top REALTOR for 14 years; President, Ed Price and Associates, REALTORS, Inc.; Price Commercial Properties, Inc.; Hinkle, Price and Cole Property Management, Inc.; 2001-present

**Organizations, Activities and Awards** (to only name a few): Westchester Baptist Church; Macedonia Resource Center, The Carl Chavis YMCA and WRLP Board of Directors; High Point Community Foundation; Guilford County Park and Recreation Commission; High Point Park and Recreation Board of Directors; Guilford County Board of Education (2010-2016); Leslie's House, The Miracle Field, High Point P&R Annual Easter Egg Hunt; His Laboring Few Annual Thanksgiving and Christmas Dinners; 2005 High Point Human Relations Commission Citizen of the Year; 2009 Citizen of the Year; 2009 HP Community Foundation Spirit of the Foundation Award; 2011 YMCA Hall of Fame; 2016 WRLP Esther Awards – The Thurgood Marshall Award

### 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: High Point Preparatory Academy
2. Full name: Dr. Chaka Walker

Home Address: 1828 Chapel Brook Way, Greensboro, NC 27405

Business Name and Address: Rockingham Community College, P.O. Box 38, Wentworth, NC 27375

Telephone No.: 252-725-5531

E-mail address: chakawalker@gmail.com

3. Brief educational and employment history.

I have a B.S. Degree and MAT Degree in Child Development from North Carolina Agricultural & Technical State University and Doctor of Education from High Point University. I have a background in education, specifically helping students with special needs meet their targeted educational goals so they can develop to their full potential.

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:

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 was recruited to serve on the Board of Directors for High Point Preparatory Academy by Dr. Kellie Jackson. We share the belief that all students should have the opportunity to attend a school that best fits their needs. Strong literacy skills are necessary for all students to reach their full potential.

6. What is your understanding of the appropriate role of a public charter school board member?

As Board members, we must govern High Point Prep to ensure our school provides a quality educational choice for all families in our community.

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 not previously served as a charter school board member. I believe my experience working at Guilford County Schools, and now as an instructor for future teachers, will bring a unique perspective to the board. I believe my background will assist with providing insight on curriculum to equally serve all students.

8. Describe the specific knowledge and experience that you would bring to the board.

I have worked as a learning facilitator, specifically for special education students. I bring to the board my experience working directly with special education students, families, and therapists to provide appropriate instruction.

### **School Mission and Program**

1. What is your understanding of the school's mission and guiding beliefs?

Our school will empower students to foster strong literacy skills and be self-motivated learners while implementing a rigorous, moral focus curriculum.

2. What is your understanding of the school's proposed educational program?

High Point Preparatory Academy will partner with National Heritage Academies (NHA) to implement their educational program. Their success is evident throughout the country, including at four partner schools in Guilford County. Their model centers around four pillars and emphasizes moral focus.

3. What do you believe to be the characteristics of a successful school?

Characteristics of a successful school include a rigorous curriculum, competent teachers, students reaching their full potential, and parental involvement. As an instructor for future educators, I understand the importance of having effective teachers in each classroom.

4. How will you know that the school is succeeding (or not) in its mission?

Our school would be succeeding in its mission if we are preparing students with the literacy skills that are necessary to be successful in high school, college, and their life beyond academics.

### **Governance**

1. Describe the role that the board will play in the school's operation.

Our Board will focus on governance. We will hold NHA accountable to delivering day to day operations of High Point Preparatory Academy. NHA and our school leader will be held responsible for delivering regular reports to our Board on academics, operations, and finances.

2. How will you know if the school is successful at the end of the first year of operation?

At the end of our first year of operation, I expect High Point Prep to be making strides toward achieving our mission and vision.

3. How will you know at the end of five years of the schools is successful?

At the end of five years, I expect High Point Prep to be fully enrolled and meeting all educational and operational goals outlined in our charter school application.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

High Point Prep will place a priority on student literacy, academic rigor, parental involvement while also ensuring the board focuses on governance and financial responsibility.

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?

If this situation were to arise, I would report the issue in accordance with our bylaws and conflict of interest protocols.

\*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, Chaka Walker, 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 High Point Preparatory Charter School is true and correct in every respect.

Signature Chaka Walker

Date 3/2/2022

**DR. CHAKA WALKER**

(252) 725-5531

chakawalker@gmail.com

**EDUCATION AND LICENSURE**

High Point University, High Point, NC- May 2020

**Doctor of Education | Cognate Area: Educational Leadership**

North Carolina Agricultural &amp; Technical State University - August 2010

**MAT Degree in Child Development | Cognate Area: Early Education and Family Studies**

North Carolina Agricultural &amp; Technical State University - December 2006

**B. S. Degree | Cognate Area: Child Development****Standard I: Highly Qualified: Birth-Kindergarten 07/01/2016-06/30/2022**

Licensed School Administrator Principal

Licensed School Administrator Superintendent

**COLLEGIATE WORK EXPERIENCE****Part-Time Instructor North Carolina Agricultural and Technical State University****2018 – Present**

- Develop and manage syllabus materials
- Coordinate coursework and curriculum with academic department chair
- Facilitate class instruction
- Supervise and provide feedback for student field experiences
- Evaluate student performance
- Adhere to protocol guidelines
- Respond promptly to grade determination

**GUILFORD COUNTY SCHOOL SYSTEM EXPERIENCE****Mission Possible Teacher Leader****2012 – 2015**

- Provided clinical and administrative supervision, coaching, technical support and evaluation feedback for teachers, service coordinators, and other personnel
- Served on the leadership team and participate in planning, policy and procedure development, and budget management
- Facilitated district wide training and professional development workshops including Teach Meet and The African American Male Symposium
- Mentored and provided advising for student teachers
- Organized schedules and workflow
- Collaborated with school personnel and community partners to support and reinforce the curriculum and build support for personal, academic and career success
- Analyzed student data and confers with the school improvement team to identify and develop a pool of qualified students in need of intensive academic support.
- Conducted parent/family outreach to strengthen school partnerships

**Exceptional Children's Teacher Guildford County Schools****2008 – Present**

- Collaborate with families and therapists to provide developmentally appropriate instruction to young children with disabilities through developing an Individualized Education Plans (IEP) and implementing the NC Foundations Standard Course of Study
- Make frequent contacts with families through home visits and participate in interagency committees
- Use technology skills to create spreadsheets, utilize forms and Microsoft Office Applications.
- Complete data using electronic medical records and database documentation
- Maintain confidentiality in and outside of service delivery settings
- Use Medicaid service definitions when billing Medicaid for services

**Habilitation Technician Lindley Habilitation Services****2008 – Present**

- Provide behavior support intervention, personal care assistance and support to individuals with disabilities by helping them accomplish personal goals that will empower them to function with greater independence in their community

**Early Head Start Teacher Willow Oaks Child Development Center****2007 – 2008**

- Provided developmentally appropriate instruction to toddler's ages 18-36 months using the Creative Curriculum to promote learning in the areas of cognitive, language, social emotional, cultural, and physical development

**Resource Long Term Substitute Teacher Oak Hill Elementary School****2007 – 2007**

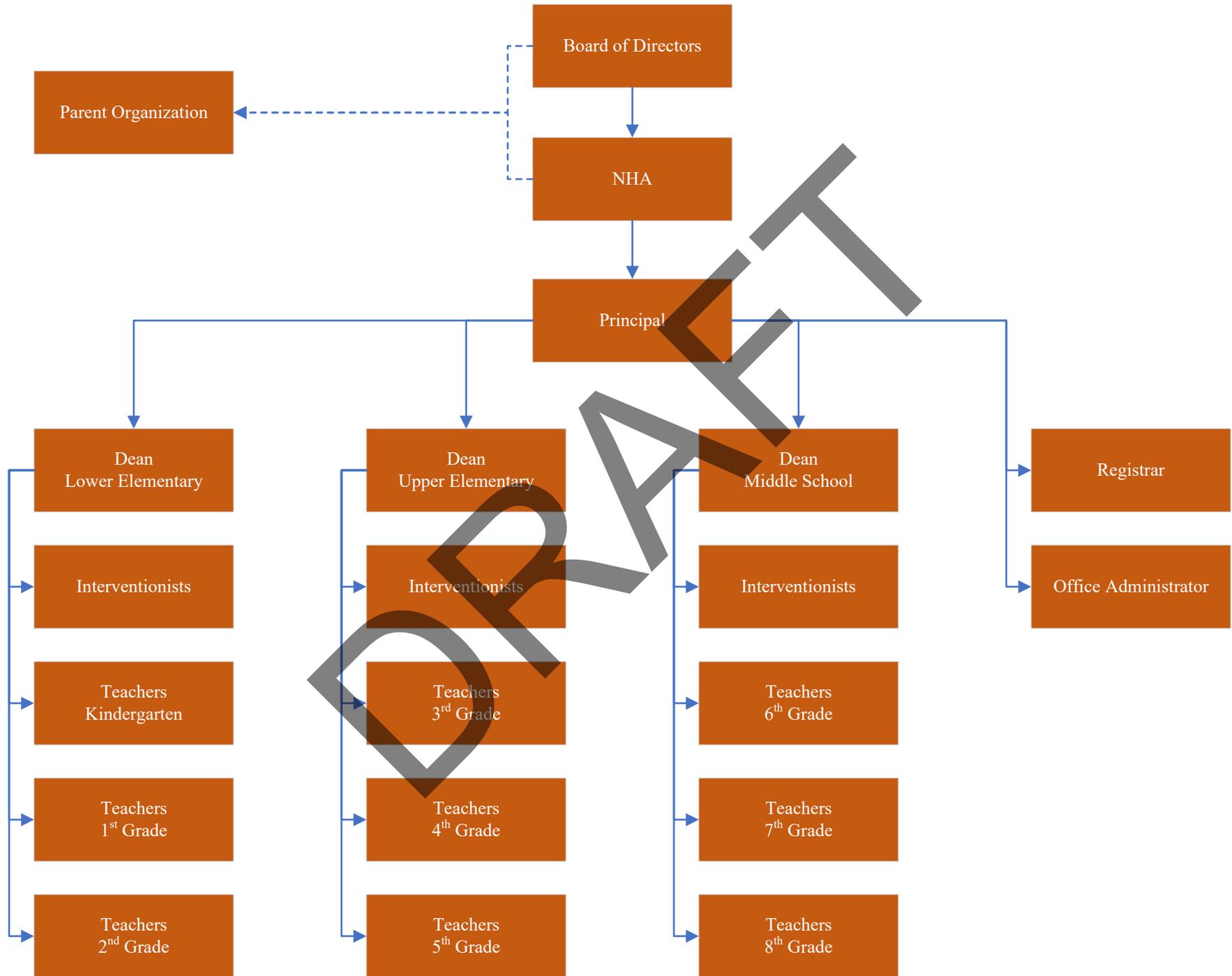
- Provided instruction for students with learning disabilities in grades K-5 in the areas of math, writing, and reading using the SRA reading and math program



# Appendix G: Organizational Chart

## High Point Preparatory Academy

### Organizational Chart





# Appendix D: Yearly Academic Calendar

## High Point Preparatory Academy

# High Point Preparatory Academy

## SAMPLE 2024-25 School Year SAMPLE

July/August						
S	M	T	W	T	F	S
23	24	25	31	1	2	2
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Mid-Late July: Principals Meeting, Leadership Summit, New Teacher Orientation - Grand Rapids, MI

7th-8th Staff PD; 9th Regional PD  
12-14th Staff PD; 15th First Day of School

September						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

2nd Labor Day

October						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

18th Fall Break  
25th End of Q1  
28th Regional PD; 29th Staff PD

November						
S	M	T	W	T	F	S
				1	2	
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

7th-8th PT Conferences  
11th Veteran's Day  
27th-29th Thanksgiving Break

December						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

23rd-Jan 3rd Winter Break

January						
S	M	T	W	T	F	S
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

1st New Year's Day  
6th School Resumes; 10th End of Q2  
20th MLK Day

February						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

13th-14th PT Conferences  
17th Presidents' Day

March						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

18th-19th Principals Meeting; 20th End of Q3  
21st -24th Quarter End Break

April						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

1st School Resumes  
18th-25th Spring Break  
28th Regional PD; 29th School Resumes

May						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

26th Memorial Day

June						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

11th Last Day School, EndQ4; 12th-13th Staff PD

July						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

4th Independence Day

Students **Do Not** Report/ Staff Report All Day  
 Students Report **Half Day**/ Staff Report All Day  
 Students/ Staff **Do Not** Report

**Last Update: 3/3/2022**  
 185 School Days  
 TBD School Hours  
 TBD (half)



# Appendix E: Daily and Weekly Schedule for Each Grade Band the School Will Ultimately Serve

## High Point Preparatory Academy

Start - End	Kinder.	Kinder.	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8
8:00 AM - 8:05 AM										
8:05 AM - 8:10 AM	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)
8:10 AM - 8:15 AM										
8:15 AM - 8:20 AM										
8:20 AM - 8:25 AM										
8:25 AM - 8:30 AM					PE/Recess (30)		Specials (30)			
8:30 AM - 8:35 AM										
8:35 AM - 8:40 AM										
8:40 AM - 8:45 AM				ELA (60)		Math (60)				
8:45 AM - 8:50 AM										
8:50 AM - 8:55 AM			ELA (75)							
8:55 AM - 9:00 AM					Specials (30)		PE (30)	Math (90)	ELA (90)	SCI/SS (90)
9:00 AM - 9:05 AM										
9:05 AM - 9:10 AM										
9:10 AM - 9:15 AM	ELA (120)	ELA (120)								
9:15 AM - 9:20 AM										
9:20 AM - 9:25 AM										
9:25 AM - 9:30 AM				Specials (30)		PE/recess (30)				
9:30 AM - 9:35 AM										
9:35 AM - 9:40 AM										
9:40 AM - 9:45 AM										
9:45 AM - 9:50 AM										
9:50 AM - 9:55 AM			Sci/SS (45)	PE (30)		Math (30)	Math (90)	ELA (90)	SCI/SS (90)	Specials (30)
9:55 AM - 10:00 AM										
10:00 AM - 10:05 AM									Recess/ intervention(30)	Recess/ intervention(30)
10:05 AM - 10:10 AM										
10:10 AM - 10:15 AM										
10:15 AM - 10:20 AM										
10:20 AM - 10:25 AM	Specials (30)	Specials (30)	PE (30)							
10:25 AM - 10:30 AM										
10:30 AM - 10:35 AM										
10:35 AM - 10:40 AM										
10:40 AM - 10:45 AM				ELA (60)						
10:45 AM - 10:50 AM										
10:50 AM - 10:55 AM										
10:55 AM - 11:00 AM	PE (30)	PE (30)	Specials (30)					SCI/SS (90)	Math (90)	ELA (90)
11:00 AM - 11:05 AM										
11:05 AM - 11:10 AM										
11:10 AM - 11:15 AM										
11:15 AM - 11:20 AM										
11:20 AM - 11:25 AM										
11:25 AM - 11:30 AM	ELA (30)	ELA (30)								
11:30 AM - 11:35 AM										
11:35 AM - 11:40 AM										
11:40 AM - 11:45 AM			Math (60)							
11:45 AM - 11:50 AM										
11:50 AM - 11:55 AM										
11:55 AM - 12:00 PM	Lunch (30)	Lunch (30)								
12:00 PM - 12:05 PM										
12:05 PM - 12:10 PM										
12:10 PM - 12:15 PM										
12:15 PM - 12:20 PM										
12:20 PM - 12:25 PM	Recess (20)	Recess (20)	Lunch (30)	Math (85)	Math (90)	Lunch (30)	Lunch (30)			
12:25 PM - 12:30 PM										
12:30 PM - 12:35 PM										
12:35 PM - 12:40 PM										
12:40 PM - 12:45 PM		ELA (15)								
12:45 PM - 12:50 PM										
12:50 PM - 12:55 PM										
12:55 PM - 1:00 PM										
1:00 PM - 1:05 PM	Math (55)									
1:05 PM - 1:10 PM										
1:10 PM - 1:15 PM										
1:15 PM - 1:20 PM										
1:20 PM - 1:25 PM										
1:25 PM - 1:30 PM										
1:30 PM - 1:35 PM		Math (80)								
1:35 PM - 1:40 PM										
1:40 PM - 1:45 PM										
1:45 PM - 1:50 PM										
1:50 PM - 1:55 PM				ELA (45)	Sci/SS (70)					
1:55 PM - 2:00 PM										
2:00 PM - 2:05 PM								PE/ Band/intervention (30)	ICore/intervention	ICore/intervention
2:05 PM - 2:10 PM	Early Dismissal (parent opt in)		ELA (95)							
2:10 PM - 2:15 PM										
2:15 PM - 2:20 PM										
2:20 PM - 2:25 PM										
2:25 PM - 2:30 PM										
2:30 PM - 2:35 PM										
2:35 PM - 2:40 PM		Sci/SS (45)		Sci/SS (45)						
2:40 PM - 2:45 PM										
2:45 PM - 2:50 PM										
2:50 PM - 2:55 PM										
2:55 PM - 3:00 PM	Dismissal (5)		Dismissal (5)		Dismissal (5)	Dismissal (5)	Dismissal (5)	Dismissal (5)	Dismissal (5)	Dismissal (5)
3:00 PM - 3:05 PM										



# Appendix B: Curriculum Outline for Each Grade Band the School Will Ultimately Serve

## High Point Preparatory Academy

### Synopsis of Planned Curriculum

High Point Prep will utilize the K-8 curriculum designed for NHA-partner schools which has been carefully aligned with the state standards. The school's core content areas of English language arts (ELA), mathematics, science, and social studies, summarized very briefly below, will be supplemented by co-curricular areas that help shape students as well-rounded individuals, including art, music, physical education, and library and educational technology. Moral focus, too, will be an integrated component of the curriculum.

*ELA:* In grades K-2, the curriculum will emphasize the foundations of reading. This includes the ability to decode automatically, read with fluency, and gain the capacity to comprehend increasingly complex texts across a range of types and disciplines. Student literacy will be promoted through rich, domain-specific content in a variety of fiction and nonfiction texts, including a true balance of informational and literary genres. In grades 3-5, reading instruction will focus on complex, grade-appropriate texts to prepare students for the complexity of materials they must study to become college- and career-ready. Reading instruction will feature a balance of informational and literary work. In grades 6-8, ELA, social studies, and science teachers will offer literary experiences in their content areas, using materials chosen specifically for their literacy value. The middle school curriculum will include a blend of classic literature and literary nonfiction, including substantial exposure to historical and scientific documents.

*Math:* The math curriculum underscores the importance of number sense and operations, measurement, computation using formal algorithms, geometry, data analysis and probability, and problem-solving and inquiry. It follows the state standards for math. In grades K-2, number sense and computational fluency will be the main focus of students' learning. In grades 3-5, learning will shift from computation to fractional awareness. The ability to compose and decompose numbers will be built upon to deepen understanding of fractions, percentages, decimals, and computation. Algebraic skills will also be developed. In grades 6-8, the focus will be on the study of algebra and functions.

*Science:* In grades K-2, the content of the science curriculum focuses on scientific inquiry and engineering designs primarily through the study of events and phenomena in nature. In grades 3-5, the science curriculum directs students to begin exploring the science and engineering practices, crosscutting concepts, and engineering design solutions by making connections between events. In grades 6-8, the curriculum includes further exploration of the relationships between science and engineering practices and crosscutting concepts while also connecting knowledge of scientific concepts to real world examples and solidifying congruence between students' understanding of phenomena to that of the scientific community.

*Social Studies:* The social studies curriculum emphasizes how geography and economics interact in a global society and follows the state standards for social studies. In grades K-2, the curriculum will focus on students' ability to describe basic historical events, people, and conflicts. They will begin to understand their own culture by studying examples of their community and school, and places around the world. Students will become familiar with basic geographical representations, economic concepts and resources, and functions of government. In grades 3-5, the curriculum will help students describe historical events in more detail. They will also be able to communicate how these events impacted other historical occurrences. In grades 6-8, students will practice connecting events in U.S. and world history with current events and learn about relationships among geography, history, economics, and culture.

# Sample Scope & Sequence

High Point Preparatory Academy

FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 1					
	Reading	Writing	Speaking and Listening	Language	
Year Long Curriculum Plan by Quarter	<p><b>Key Ideas and Details</b>  <b>RI.1.1 and RL.1.1</b> Ask and answer questions about key details.</p> <p><b>RI.1.2</b> Identify the main topic and retell key details of a text.</p> <p><b>RL.1.3</b> Describe characters, settings, and major events in a story, using key details.</p> <p><b>RI.1.3</b> Describe the connection between two individuals, events, ideas, or pieces of information in a text.</p> <p><b>RL.1.2</b> Retell stories, including key details, and demonstrate understanding of their central message or</p> <p><b>Craft and Structure</b>  <b>RI.1.4</b> Ask and answer questions to help determine or clarify the meaning of words and phrases in a text.</p> <p><b>RI.1.7</b> Use the illustrations and details in a text to describe its key ideas.</p> <p><b>Print Concepts</b>  <b>RF.1.2</b> Demonstrate understanding of spoken words, syllables, and sounds (phonemes).</p> <p>a. Distinguish long from short vowel sounds in spoken single-syllable words.</p> <p>b. Orally produce single-syllable words by blending sounds (phonemes), including consonant blends.</p> <p>c. Isolate and pronounce initial, medial vowel, and final sounds (phonemes) in spoken single-syllable words.</p>	<p><b>Text Types and Purposes</b>  <b>W.1.1</b> Write opinion pieces in which they introduce the topic or name the book they are writing about, state an opinion, supply a reason for the opinion, and provide some sense of closure.</p>	<p><b>Comprehension and Collaboration</b>  <b>SL.1.3</b> Ask and answer questions about what a speaker says in order to gather additional information or clarify something that is not understood.</p>	<p><b>Vocabulary Acquisition and Use</b>  <b>L.K.4</b> Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on kindergarten reading and content.</p> <p>a. Identify new meanings for familiar words and apply them accurately (e.g., knowing duck is a bird and learning the verb to duck).</p> <p>b. Use the most frequently occurring inflections and affixes (e.g., -ed, -s, re-, un-, pre-, -ful, -less) as a clue to the meaning of an unknown word.</p> <p><b>Conventions of Standard English</b>  <b>L.1.1</b> Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.</p> <p>a. Print all upper- and lowercase letters.</p> <p>b. Use common, proper, and possessive nouns.</p> <p>c. Use singular and plural nouns with matching verbs in basic sentences (e.g., He hops; We hop).</p> <p>d. Use personal, possessive, and indefinite pronouns (e.g., I, me, my; they, them, their, anyone, everything).</p> <p>e. Use verbs to convey a sense of past, present, and future (e.g., Yesterday I walked home; Today I walk home; Tomorrow I will walk home).</p> <p>f. Use frequently occurring adjectives.</p> <p>h. Use determiners (e.g., articles, demonstratives).</p>	

FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

<p><b>d.</b> Segment spoken single-syllable words into their complete sequence of individual sounds (phonemes).</p> <p><b>Phonological Awareness</b>  <b>RF.1.1</b> Demonstrate understanding of the organization and basic features of print.</p> <p><b>a.</b> Recognize the distinguishing features of a sentence (e.g., first word, capitalization, ending).</p> <p><b>RF.1.3</b> Know and apply grade-level phonics and word analysis skills in decoding words.</p> <p><b>a.</b> Know the spelling-sound correspondences for common consonant digraphs (two letters that represent one sound).</p> <p><b>b.</b> Decode regularly spelled one-syllable words.</p> <p><b>c.</b> Know final -e and common vowel team conventions for representing long vowel sounds.</p> <p><b>d.</b> Use knowledge that every syllable must have a vowel sound to determine the number of syllables in a printed word.</p> <p><b>e.</b> Decode two-syllable words following basic patterns by breaking the words into syllables.</p> <p><b>f.</b> Read words with inflectional endings.  <b>g.</b> Recognize and read grade-appropriate irregularly spelled.</p>			<p><b>i.</b> Use frequently occurring prepositions (e.g., during, beyond, toward).</p> <p><b>j</b> Produce and expand complete simple and compound declarative, interrogative, imperative, and exclamatory sentences in response to prompts.</p> <p><b>L.1.2</b> Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p><b>a</b> Capitalize dates and names of people.</p> <p><b>b</b> Use end punctuation for sentences.</p> <p><b>c</b> Use commas in dates and to separate single words in a series.</p> <p><b>d</b> Use conventional spelling for words with common spelling patterns and for frequently occurring irregular words.</p> <p><b>e</b> Spell untaught words phonetically, drawing on phonemic awareness and spelling conventions.</p> <p><b>Vocabulary Acquisition and Use</b>  <b>L.1.4</b> Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 1 reading and content, choosing flexibly from an array of strategies.</p> <p><b>a</b> Use sentence-level context as a clue to the meaning of a word or phrase.</p> <p><b>b</b> Use frequently occurring affixes as a clue to the meaning of a word.</p> <p><b>c</b> Identify frequently occurring root words (e.g., look) and their inflectional forms.</p>
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FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 2				
	Reading	Writing	Speaking and Listening	Language
Year Long Curriculum Plan by Quarter	<p><b>Key Ideas and Details</b>  <b>RI.1.1 and RL.1.1</b> Ask and answer questions about key details.</p> <p><b>RL.1.2</b> Retell stories, including key details, and demonstrate understanding of their central message.</p> <p><b>RI.1.3</b> Describe the connection between two individuals, events, ideas, or pieces of information in a text.</p> <p><b>RL.1.3</b> Describe characters, settings, and major events in a story, using key details.</p> <p><b>Craft and Structure</b>  <b>RI.1.4</b> Ask and answer questions to help determine or clarify the meaning of words and phrases in a text.</p> <p><b>RL.1.4</b> Identify words and phrases in stories or poems that suggest feelings or appeal to the senses.</p> <p><b>RL.1.5</b> Explain major differences between books that tell stories and books that give information, drawing on a wide reading of a range of text types.</p> <p><b>RI.1.5</b> Know and use various text features (e.g., headings, tables of contents, glossaries, electronic menus, icons) to locate key facts or information in a text.</p> <p><b>Integration of Knowledge and Ideas</b>  <b>RI.1.7</b> Use the illustrations and details in a text to describe its key ideas.</p>	<p><b>Text Types and Purposes</b>  <b>W.1.1</b> Write opinion pieces in which they introduce the topic or name the book they are writing about, state an opinion, supply a reason for the opinion, and provide some sense of closure.</p> <p><b>W.1.2</b> Write informative/explanatory texts in which they name a topic, supply some facts about the topic, and provide some sense of closure.</p> <p><b>Production and Distribution of Writing</b>  <b>W.1.5</b> With guidance and support from adults, focus on a topic, respond to questions and suggestions from peers, and add details to strengthen writing as needed.</p>	<p><b>Comprehension and Collaboration</b>  <b>SL.1.2</b> Ask and answer questions about key details in a text read aloud or information presented orally or through other media.</p> <p><b>SL.1.1</b> Participate in collaborative conversations with diverse partners about grade 1 topics and texts with peers and adults in small and larger groups.</p> <p><b>a</b> Follow agreed-upon rules for discussions (e.g., listening to others with care, speaking one at a time about the topics and texts under discussion).</p> <p><b>b</b> Build on others' talk in conversations by responding to the comments of others through multiple exchanges.</p> <p><b>c</b> Ask questions to clear up any confusion about the topics and texts under discussion</p>	<p><b>Vocabulary Acquisition and Use</b>  <b>L.1.2</b> Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p><b>a</b> Capitalize dates and names of people.</p> <p><b>b</b> Use end punctuation for sentences.</p> <p><b>c</b> Use commas in dates and to separate single words in a series.</p> <p><b>d</b> Use conventional spelling for words with common spelling patterns and for frequently occurring irregular words.</p> <p><b>e</b> Spell untaught words phonetically, drawing on phonemic awareness and spelling conventions.</p> <p><b>L.1.5</b> With guidance and support from adults, demonstrate understanding of word relationships and nuances in word meanings.</p> <p><b>a</b> Sort words into categories (e.g., colors, clothing) to gain a sense of the concepts the categories represent.</p> <p><b>b</b> Define words by category and by one or more key attributes (e.g., a duck is a bird that swims; a tiger is a large cat with stripes).</p> <p><b>c</b> Identify real-life connections between words and their use (e.g., note places at home that are cozy).</p>

FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

<p><b>RL.1.7</b> Use illustrations and details in a story to describe its characters, setting, or events.</p> <p><b>Reading Foundational Skills</b>  <b>Phonics and Word recognition</b>  <b>RF.1.4</b> Read with sufficient accuracy and fluency to support comprehension.</p> <p><b>a.</b> Read grade-level text with purpose and understanding.</p> <p><b>b.</b> Read grade-level text orally with accuracy, appropriate rate, and expression.</p> <p><b>c.</b> Use context to confirm or self-correct word recognition and understanding, rereading as necessary.</p>			<p><b>d</b> Distinguish shades of meaning among verbs differing in manner (e.g., look, peek, glance, stare, glare, scowl) and adjectives differing in intensity (e.g., large, gigantic) by defining or choosing them or by acting out the meanings .</p>
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SAMPLE

FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 3				
	Reading	Writing	Speaking and Listening	Language
Year Long Curriculum Plan by Quarter	<p><b>Key Ideas and Details</b>  <b>RI.1.1 and RL.1.1</b> Ask and answer questions about key details.</p> <p><b>RI.1.2</b> Identify the main topic and retell key details of a text.</p> <p><b>RL.1.2</b> Retell stories, including key details, and demonstrate understanding of their central message or main idea.</p> <p><b>RL.1.3</b> Describe characters, settings, and major events in a story, using key details.</p> <p><b>RI.1.3</b> Describe the connection between two individuals, events, ideas, or pieces of information in a text.</p> <p><b>Craft and Structure</b>  <b>RI.1.4</b> Ask and answer questions to help determine or clarify the meaning of words and phrases in a text.</p> <p><b>RL.1.6</b> Identify who is telling the story at various points in a text.</p> <p><b>RI.1.6</b> Distinguish between information provided by pictures or other illustrations and information provided by the words in a text.</p> <p><b>Integration of Knowledge and Ideas</b>  <b>RI.1.7</b> Use the illustrations and details in a text to describe its key ideas.</p> <p><b>RL.1.7</b> Use illustrations and details in a story to describe its characters, setting, or events.</p>	<p><b>Text Types and Purposes</b>  <b>W.1.1</b> Write opinion pieces in which they introduce the topic or name the book they are writing about, state an opinion, supply a reason for the opinion, and provide some sense of closure.</p> <p><b>W.1.2</b> Write informative/explanatory texts in which they name a topic, supply some facts about the topic, and provide some sense of closure.</p> <p><b>Production and Distribution of Writing</b>  <b>W.1.5</b> With guidance and support from adults, focus on a topic, respond to questions and suggestions from peers, and add details to strengthen writing as needed.</p>	<p><b>Comprehension and Collaboration</b>  <b>SL.1.2</b> Ask and answer questions about key details in a text read aloud or information presented orally or through other media.</p> <p><b>SL.1.1</b> Participate in collaborative conversations with diverse partners about grade 1 topics and texts with peers and adults in small and larger groups.</p> <p><b>a.</b> Follow agreed-upon rules for discussions (e.g., listening to others with care, speaking one at a time about the topics and texts under discussion).</p> <p><b>b.</b> Build on others' talk in conversations by responding to the comments of others through multiple exchanges.</p> <p><b>c.</b> Ask questions to clear up any confusion about the topics and texts under discussion.</p>	<p><b>Conventions of Standard English</b>  <b>L.1.1</b> Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.</p> <p><b>a</b> Print all upper- and lowercase letters.</p> <p><b>b</b> Use common, proper, and possessive nouns.</p> <p><b>c</b> Use singular and plural nouns with matching verbs in basic sentences (e.g., He hops; We hop).</p> <p><b>d</b> Use personal, possessive, and indefinite pronouns (e.g., I, me, my; they, them, their, anyone, everything).</p> <p><b>e</b> Use verbs to convey a sense of past,</p> <p><b>Vocabulary Acquisition and Use</b>  <b>L.1.2</b> Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p><b>a.</b> Capitalize dates and names of people.</p> <p><b>b.</b> Use end punctuation for sentences.</p> <p><b>c.</b> Use commas in dates and to separate single words in a series.</p> <p><b>d.</b> Use conventional spelling for words with common spelling patterns and for frequently occurring irregular words.</p>

FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

<p><b>Reading Foundational Skills Fluency</b> <b>RF.1.4</b> Read with sufficient accuracy and fluency to support comprehension.</p> <p><b>a.</b> Read grade-level text with purpose and understanding.</p> <p><b>b.</b> Read grade-level text orally with accuracy, appropriate rate, and expression.</p> <p><b>c.</b> Use context to confirm or self-correct word recognition and understanding, rereading as necessary.</p>			<p><b>e.</b> Spell untaught words phonetically, drawing on phonemic awareness and spelling conventions.</p> <p><b>L.1.5</b> With guidance and support from adults, demonstrate understanding of word relationships and nuances in word meanings.</p> <p><b>a.</b> Sort words into categories (e.g., colors, clothing) to gain a sense of the concepts the categories represent.</p> <p><b>b.</b> Define words by category and by one or more key attributes (e.g., a duck is a bird that swims; a tiger is a large cat with stripes).</p> <p><b>c.</b> Identify real-life connections between words and their use (e.g., note places at home that are cozy).</p> <p><b>d.</b> Distinguish shades of meaning among verbs differing in manner (e.g., look, peek, glance, stare, glare, scowl) and adjectives differing in intensity (e.g., large, gigantic) by defining or choosing them or by acting out the meanings.</p>
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FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 4				
	Reading	Writing	Speaking and Listening	Language
Year Long Curriculum Plan by Quarter	<p><b>Key Ideas and Details</b>  <b>RI.1.1 and RL.1.1</b> Ask and answer questions about key details.</p>	<p><b>W.1.7</b> Participate in shared research and writing projects (e.g., explore a number of “how-to” books on a given topic and use them to write a sequence of instructions).</p>	<p><b>Presentation of Knowledge and Ideas</b>  <b>SL.1.5</b> Add drawings or other visual displays to descriptions when appropriate to clarify ideas, thoughts, and feelings</p>	<p><b>Conventions of Standard English</b>  <b>L.1.1</b> Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.</p>
	<p><b>Craft and Structure</b>  <b>RI.1.4</b> Ask and answer questions to help determine or clarify the meaning of words and phrases in a text.</p>	<p><b>W.1.8</b> With guidance and support from adults, recall information from experiences or gather information from provided sources to answer a question.</p>	<p><b>SL.1.6</b> Produce complete sentences when appropriate to task and situation. (See grade 1 Language standards 1 and 3 on page 26 for specific expectations.)</p>	<p>a. Print all upper- and lowercase letters.</p>
	<p><b>Integration of Knowledge and Ideas</b>  <b>RL.1.9</b> Compare and contrast the adventures and experiences of characters in stories.</p>			<p>b. Use common, proper, and possessive nouns.</p>
	<p><b>RI.1.10</b> With prompting and support, read prose and poetry of appropriate complexity for grade 1.</p>			<p>c. Use singular and plural nouns with matching verbs in basic sentences (e.g., He hops; We hop).</p>
	<p><b>RI.1.9</b> Identify basic similarities in and differences between two texts on the same topic (e.g., in illustrations, descriptions, or procedures).</p>			<p>d. Use personal, possessive, and indefinite pronouns (e.g., I, me, my; they, them, their, anyone, everything).</p>
	<p><b>RI.1.10</b> With prompting and support, read informational texts appropriately complex for grade 1.</p>			<p>e Use verbs to convey a sense of past.</p>
	<p><b>RF.1.4</b> Read with sufficient accuracy and fluency to support comprehension.</p>			<p><b>L.1.6</b> Use words and phrases acquired through conversations, reading and being read to, and responding to texts, including using frequently occurring conjunctions to signal simple relationships (e.g., I named my hamster Nibbles because she nibbles too much because she likes that.</p>
	<p>a. Read grade-level text with purpose and understanding.</p>			
	<p>b. Read grade-level text orally with accuracy, appropriate rate, and expression.</p>			
	<p>c. Use context to confirm or self-correct word recognition and understanding, rereading as necessary.</p>			

## FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

### Objectives Assessed Throughout the Year

**RI.1.1 and RL.1.1** Ask and answer questions about key details.

**RI.1.4** Ask and answer questions to help determine or clarify the meaning of words and phrases in a text.

**W.1.1** Write opinion pieces in which they introduce the topic or name the book they are writing about, state an opinion, supply a reason for the opinion, and provide some sense of closure.

**L.1.1** Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.

**a.** Print all upper- and lowercase letters.

**b.** Use common, proper, and possessive nouns.

**c.** Use singular and plural nouns with matching verbs in basic sentences (e.g., He hops; We hop).

**d.** Use personal, possessive, and indefinite pronouns (e.g., I, me, my; they, them, their, anyone, everything).

**e.** Use verbs to convey a sense of past, present, and future (e.g., Yesterday I walked home; Today I walk home; Tomorrow I will walk home).

**f.** Use frequently occurring adjectives.

**h.** Use determiners (e.g., articles, demonstratives).

**i.** Use frequently occurring prepositions (e.g., during, beyond, toward).

**j.** Produce and expand complete simple and compound declarative, interrogative, imperative, and exclamatory sentences in response to prompts.

GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 1				
	Reading	Writing	Speaking and Listening	Language
Year Long Curriculum Plan by Quarter	<p><b>Key Ideas and Details</b>  <b>RL.4.1</b> Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.</p> <p><b>RL.4.2</b> Determine a theme of a story, drama, or poem from details in the text; summarize the text</p> <p><b>RL.4.3</b> Describe in depth a character, setting, or event in a story or drama, drawing on specific details in the text (e.g., a character's thoughts, words, or actions).</p> <p><b>Craft and Structure</b>  <b>RI.4.4</b> Determine the meaning of general academic and domain-specific words or phrases in a text relevant to a grade 4 topic or subject area.</p> <p><b>RI.4.5</b> Describe the overall structure (e.g., chronology, comparison, cause/effect, problem/solution) of events, ideas, concepts, or information in a text or part of a text.                      Integration of Knowledge and Ideas</p>	<p><b>Text Types and Purposes</b>  <b>W.4.3</b> Write narratives to develop real or imagined experiences or events using effective technique, descriptive details, and clear event sequences.</p> <ol style="list-style-type: none"> <li>Orient the reader by establishing a situation and introducing a narrator and/or characters; organize an event sequence that unfolds naturally.</li> <li>Use dialogue and description to develop experiences and events or show the responses of characters to situations.</li> <li>Use a variety of transitional words and phrases to manage the sequence of events.</li> <li>Use concrete words and phrases and sensory details to convey experiences and events precisely.</li> <li>Provide a conclusion that follows from the narrated experiences or events.</li> </ol> <p><b>Production and Distribution of Writing</b>  <b>W.4.4.</b> Produce clear and coherent writing in which the development and organization are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)</p>	<p><b>Comprehension and Collaboration</b>  <b>SL.4.1</b> Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on <i>grade 4 topics and texts</i>, building on others' ideas and expressing their own clearly.</p> <ol style="list-style-type: none"> <li>Come to discussions prepared, having read or studied required material; explicitly draw on that preparation and other information known about the topic to explore ideas under discussion.</li> <li>Follow agreed-upon rules for discussions and carry out assigned roles.</li> <li>Pose and respond to specific questions to clarify or follow up on information, and make comments that contribute to the discussion and link to the remarks of others.</li> <li>Review the key ideas expressed and explain their own ideas and understanding in light of the discussion.</li> </ol> <p><b>SL.4.2</b> Paraphrase portions of a text read aloud or information presented in diverse media and formats, including visually, quantitatively, and orally.</p>	<p><b>Conventions of Standard English</b>  <b>L.4.1</b> Use relative pronouns (who, whose, whom, which, that) and relative adverbs (where, when, why).</p> <p><b>L.4.1</b> Form and use the progressive (e.g., I was walking; I am walking; I will be walking) verb tenses.</p> <p><b>L.4.2</b> Use correct capitalization.</p> <p><b>Knowledge of Language</b>  <b>L.4.3</b> Choose words and phrases to convey ideas precisely.</p> <p><b>Vocabulary Acquisition and Use</b>  <b>L.4.4</b> Use context (e.g., definitions, examples, or restatements in text) as a clue to the meaning of a word or phrase.</p> <p><b>L.4.5</b> Explain the meaning of simple similes and metaphors (e.g., as pretty as a picture) in context.</p>

GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

		<p><b>W.4.5</b> With guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, and editing. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grade 4.)</p> <p><b>W.4.6</b> With some guidance and support from adults, use technology, including the Internet, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of one page in one sitting.</p> <p><b>Research to Build and Present Knowledge</b></p> <p><b>W.4.7</b> Conduct short research projects that build knowledge through investigation of different aspects of a topic.</p>		
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GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 2				
	Reading	Writing	Speaking and Listening	Language
Year Long Curriculum Plan by Quarter	<p><b>Key Ideas and Details</b>  <b>RI.4.1</b> Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.</p> <p><b>RI.4.2</b> Determine the main idea of a text and explain how it is supported by key details; summarize the text.</p> <p><b>RI.4.3</b> Explain events, procedures, ideas, or concepts in a historical, scientific, or technical text, including what happened and why, based on specific information in the text.</p> <p><b>Craft and Structure</b>  <b>RI.4.4</b> Determine the meaning of general academic and domain-specific words or phrases in a text relevant to a grade 4 topic or subject area.</p> <p><b>RI.4.5</b> Explain major differences between poems, drama, and prose, and refer to the structural elements of poems (e.g., verse, rhythm, meter) and drama (e.g., casts of characters, settings, descriptions, dialogue, stage directions) when writing or speaking about a text.</p> <p><b>Integration of Knowledge and Ideas</b>  <b>RI.4.7</b> Interpret information presented visually, orally, or quantitatively (e.g., in charts, graphs, diagrams, time lines, animations, or interactive elements on Web pages) and explain how the information contributes to an understanding of the text in which it appears.</p>	<p><b>Text Types and Purposes</b>  <b>W.4.2</b> Write informative/explanatory texts to examine a topic and convey ideas and information clearly.</p> <ol style="list-style-type: none"> <li>Introduce a topic clearly and group related information in paragraphs and sections; include formatting (e.g., headings), illustrations, and multimedia when useful to aiding comprehension.</li> <li>Develop the topic with facts, definitions, concrete details, quotations, or other information and examples related to the topic.</li> <li>Link ideas within categories of information using words and phrases (e.g., another, for example, also, because).</li> <li>Use precise language and domain-specific vocabulary to inform about or explain the topic.</li> <li>Provide a concluding statement or section related to the information or explanation presented.</li> </ol> <p><b>Production and Distribution of Writing</b>  <b>W.4.4.</b> Produce clear and coherent writing in which the development and organization are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)</p>	<p><b>Comprehension and Collaboration</b>  <b>SL.4.3</b> Identify the reasons and evidence a speaker provides to support particular points.</p>	<p><b>Conventions of Standard English</b>  <b>L.4.1</b> Use modal auxiliaries (e.g., can, may, must) to convey various conditions.</p> <p><b>L.4.1</b> Order adjectives within sentences according to conventional patterns (e.g., a small red bag rather than a red small bag).</p> <p><b>L.4.2</b> Use commas and quotation marks to mark direct speech and quotations from a text.</p> <p><b>Knowledge of Language</b>  <b>L.4.3</b> Choose punctuation for effect.</p> <p><b>Vocabulary Acquisition and Use</b>  <b>L.4.4</b> Use common, grade-appropriate Greek and Latin affixes and roots as clues to the meaning of a word (e.g., telegraph, photograph, autograph).</p> <p><b>L.4.5</b> Recognize and explain the meaning of common idioms, adages, and proverbs.</p>

GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

		<p><b>W.4.5</b> With guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, and editing. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grade 4.)</p> <p><b>W.4.6</b> With some guidance and support from adults, use technology, including the Internet, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of one page in one sitting.</p> <p><b>Research to Build and Present Knowledge</b></p> <p><b>W.4.8.</b> Recall relevant information from experiences or gather relevant information from print and digital sources; take notes and categorize information, and provide a list of sources.</p>		
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GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 3				
	Reading	Writing	Speaking and Listening	Language
Year Long Curriculum Plan by Quarter	<p><b>Key Ideas and Details</b>  <b>RL.4.1</b> Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.</p> <p><b>RL.4.2</b> Determine a theme of a story, drama, or poem from details in the text; summarize the text</p> <p><b>RL.4.3</b> Describe in depth a character, setting, or event in a story or drama, drawing on specific details in the text (e.g., a character's thoughts, words, or actions).</p> <p><b>Craft and Structure</b>  <b>RI.4.6</b> Compare and contrast a firsthand and secondhand account of the same event or topic; describe the differences in focus and the information provided.</p> <p><b>Integration of Knowledge and Ideas</b>  <b>RL.4.7</b> Make connections between the text of a story or drama and a visual or oral presentation of the text, identifying where each version reflects specific descriptions and directions in the text.</p> <p><b>RI.4.9</b> Integrate information from two texts on the same topic in order to write or speak about the subject knowledgeably.</p>	<p><b>Text Types and Purposes</b>  <b>W.4.2</b> Write informative/explanatory texts to examine a topic and convey ideas and information clearly.</p> <ol style="list-style-type: none"> <li>Introduce a topic clearly and group related information in paragraphs and sections; include formatting (e.g., headings), illustrations, and multimedia when useful to aiding comprehension.</li> <li>Develop the topic with facts, definitions, concrete details, quotations, or other information and examples related to the topic.</li> <li>Link ideas within categories of information using words and phrases (e.g., another, for example, also, because).</li> <li>Use precise language and domain-specific vocabulary to inform about or explain the topic.</li> <li>Provide a concluding statement or section related to the information or explanation presented.</li> </ol> <p><b>Production and Distribution of Writing</b>  <b>W.4.4.</b> Produce clear and coherent writing in which the development and organization are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)</p>	<p><b>Presentation of Knowledge and Ideas</b>  <b>SL.4.4</b> Report on a topic or text, tell a story, or recount an experience in an organized manner, using appropriate facts and relevant, descriptive details to support main ideas or themes; speak clearly at an understandable pace.</p> <p><b>SL.4.5</b> Add audio recordings and visual displays to presentations when appropriate to enhance the development of main ideas or themes.</p>	<p><b>Conventions of Standard English</b>  <b>L.4.1</b> Form and use prepositional phrases.</p> <p><b>L.4.1</b> Produce complete sentences, recognizing and correcting inappropriate fragments and run-ons.</p> <p><b>L.4.1</b> Correctly use frequently confused words (e.g., to, too, two; there, their).</p> <p><b>L.4.2</b> Use a comma before a coordinating conjunction in a compound sentence.</p> <p><b>Knowledge of Language</b>  <b>L.4.3</b> Choose punctuation for effect.</p> <p><b>Vocabulary Acquisition and Use</b>  <b>L.4.4</b> Consult reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation and determine or clarify the precise meaning of key words and phrases.</p> <p><b>L.4.5</b> Demonstrate understanding of words by relating them to their opposites (antonyms) and to words with similar but not identical meanings (synonyms).</p>

GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

		<p><b>W.4.5</b> With guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, and editing. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grade 4.)</p> <p><b>W.4.6</b> With some guidance and support from adults, use technology, including the Internet, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of one page in one sitting.</p> <p><b>Research to Build and Present Knowledge</b></p> <p><b>W.4.9</b> Draw evidence from literary or informational texts to support analysis, reflection, and research.</p> <ol style="list-style-type: none"> <li>a. Apply grade 4 Reading standards to literature (e.g., “Describe in depth a character, setting, or event in a story or drama, drawing on specific details in the text [e.g., a character’s thoughts, words, or actions].”).</li> </ol>		
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GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 4						
Reading		Writing		Speaking and Listening	Language	
Year Long Curriculum Plan by Quarter	<b>Key Ideas and Details</b> <b>RI.4.1</b> Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.  <b>RI.4.2</b> Determine the main idea of a text and explain how it is supported by key details; summarize the text.  <b>RI.4.3</b> Explain events, procedures, ideas, or concepts in a historical, scientific, or technical text, including what happened and why, based on specific information in the text.		<b>Text Types and Purposes</b> <b>W.4.1</b> Write opinion pieces on topics or texts, supporting a point of view with reasons and information. a. Introduce a topic or text clearly, state an opinion, and create an organizational structure in which related ideas are grouped to support the writer’s purpose. b. Provide reasons that are supported by facts and details. c. Link opinion and reasons using words and phrases (e.g., for instance, in order to, in addition). d. Provide a concluding statement or section related to the opinion presented.		<b>Presentation of Knowledge and Ideas</b> <b>SL.4.6</b> Differentiate between contexts that call for formal English (e.g., presenting ideas) and situations where informal discourse is appropriate (e.g., small-group discussion); use formal English when appropriate to task and situation.	<b>Conventions of Standard English</b> <b>L.4.1.</b> Form and use the progressive (e.g., I was walking; I am walking; I will be walking) verb tenses.  <b>L.4.1</b> Form and use prepositional phrases.  <b>L.4.1</b> Produce complete sentences, recognizing and correcting inappropriate fragments and run-ons.  <b>L.4.2</b> Use correct capitalization.  <b>L.4.2</b> Spell grade-appropriate words correctly, consulting references as needed.
	<b>Craft and Structure</b> <b>RL.4.4</b> Determine the meaning of words and phrases as they are used in a text, including those that allude to significant characters found in mythology (e.g., Herculean).  <b>RI.4.5</b> Describe the overall structure (e.g., chronology, comparison, cause/effect, problem/solution) of events, ideas, concepts, or information in a text or part of a text.  <b>RL.4.6</b> Compare and contrast the point of view from which different stories are narrated, including the difference between first- and third-person narrations.		<b>W.4.3</b> Write narratives to develop real or imagined experiences or events using effective technique, descriptive details, and clear event sequences. a. Orient the reader by establishing a situation and introducing a narrator and/or characters; organize an event sequence that unfolds naturally. b. Use dialogue and description to develop experiences and events or show the responses of characters to situations. c. Use a variety of transitional words and phrases to manage the sequence of events. d. Use concrete words and phrases and sensory details to convey experiences and events precisely. e. Provide a conclusion that follows from the narrated experiences or events.			<b>Knowledge of Language</b> <b>L.4.4</b> Use context (e.g., definitions, examples, or restatements in text) as a clue to the meaning of a word or phrase.  <b>Vocabulary Acquisition and Use</b> <b>L.4.6</b> Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases, including those that signal precise actions, emotions, or states of being (e.g., quizzed, whined, stammered) and that are based on a particular topic (e.g., <i>wildlife, conservation, and endangered</i> when discussing animal preservation).

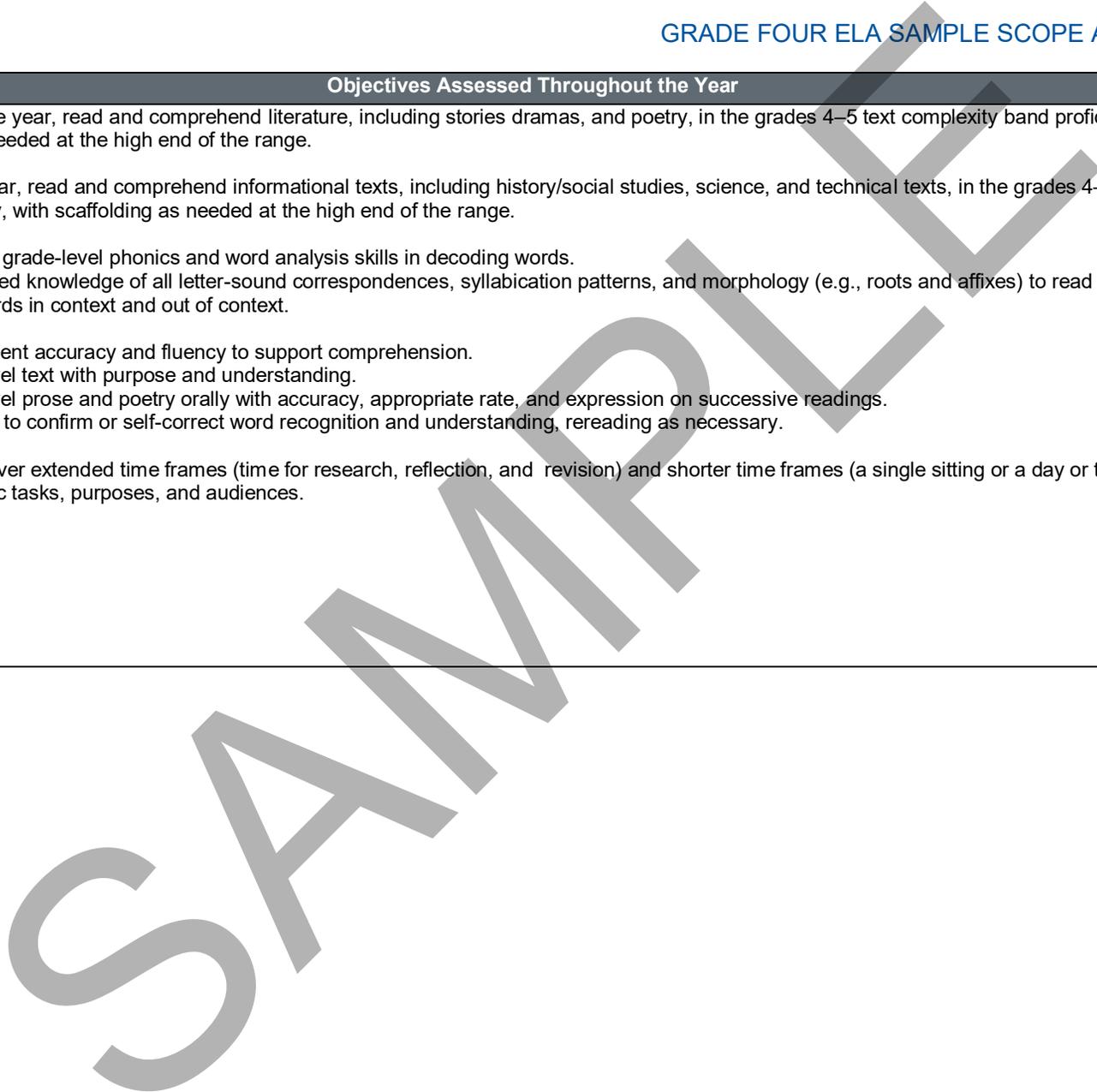
GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

<p><b>Integration of Knowledge and Ideas</b>  <b>RI.4.7</b> Interpret information presented visually, orally, or quantitatively (e.g., in charts, graphs, diagrams, time lines, animations, or interactive elements on Web pages) and explain how the information contributes to an understanding of the text in which it appears.</p> <p><b>RI.4.8</b> Explain how an author uses reasons and evidence to support particular points in a text.</p> <p><b>RI.4.9</b> Compare and contrast the treatment of similar themes and topics (e.g., opposition of good and evil) and patterns of events (e.g., the quest) in stories, myths, and traditional literature from different cultures.</p>	<p><b>Production and Distribution of Writing</b>  <b>W.4.4.</b> Produce clear and coherent writing in which the development and organization are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)</p> <p><b>W.4.5</b> With guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, and editing. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grade 4.)</p> <p><b>W.4.6</b> With some guidance and support from adults, use technology, including the Internet, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of one page in one sitting.</p> <p><b>Research to Build and Present Knowledge</b>  <b>W.4.9.</b> Draw evidence from literary or informational texts to support analysis, reflection, and research.              b. Apply grade 4 Reading standards to informational texts (e.g., “Explain how an author uses reasons and evidence to support particular points in a text”).</p>		
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## GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

### Objectives Assessed Throughout the Year

- RL.4.10** By the end of the year, read and comprehend literature, including stories dramas, and poetry, in the grades 4–5 text complexity band proficiently, with scaffolding as needed at the high end of the range.
- RI.4.10** By the end of year, read and comprehend informational texts, including history/social studies, science, and technical texts, in the grades 4–5 text complexity band proficiently, with scaffolding as needed at the high end of the range.
- RF.4.3** Know and apply grade-level phonics and word analysis skills in decoding words.
  - a. Use combined knowledge of all letter-sound correspondences, syllabication patterns, and morphology (e.g., roots and affixes) to read accurately unfamiliar multisyllabic words in context and out of context.
- RF.4.4** Read with sufficient accuracy and fluency to support comprehension.
  - a. Read on-level text with purpose and understanding.
  - b. Read on-level prose and poetry orally with accuracy, appropriate rate, and expression on successive readings.
  - c. Use context to confirm or self-correct word recognition and understanding, rereading as necessary.
- W.4.10** Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.



GRADE SEVEN ELA SCOPE AND SEQUENCE

QUARTER 1					
Reading		Writing	Speaking and Listening	Language	
Unit 1					
Year Long Curriculum Plan by Quarter	<b>Key Ideas and Details</b> <b>RL.7.1</b> Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text. <b>RL.7.2</b> Determine a theme or central idea of a text and analyze its development over the course of the text; provide an objective summary of the text.  <b>Craft and Structure</b> <b>RL.7.4</b> Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of rhymes and other repetitions of sounds (e.g., alliteration) on a specific verse or stanza of a poem or section of a story or drama.		<b>Research to Build and Present Knowledge</b> <b>W.7.9</b> Draw evidence from literary or informational texts to support analysis, reflection, and research. a. Apply grade 7 Reading standards to literature (e.g., "Determine a theme or central idea of a text and analyze its development over the course of the text").	<b>Comprehension and Collaboration</b> <b>SL.7.1</b> Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grade 7 topics, texts, and issues, building on others' ideas and expressing their own clearly. a. Come to discussions prepared, having read or researched material under study; explicitly draw on that preparation by referring to evidence on the topic, text, or issue to probe and reflect on ideas under discussion. b. Follow rules for collegial discussions, track progress toward specific goals and deadlines, and define individual roles as needed. c. Pose questions that elicit elaboration and respond to others' questions and comments with relevant observations and ideas that bring the discussion back on topic as needed. d. Acknowledge new information expressed by others and, when warranted, modify their own views.	<b>Conventions of Standard English</b> <b>L.7.1</b> Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. b. Choose among simple, compound, complex, and compound-complex sentences to signal differing relationships among ideas. <b>L.7.2</b> Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. b. Spell correctly.  <b>Vocabulary Acquisition and Use</b> <b>L.7.4</b> Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 7 reading and content, choosing flexibly from a range of strategies. a. Use context (e.g., the overall meaning of a sentence or paragraph; a word's position or function in a sentence) as a clue to the meaning of a word or phrase. b. Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., belligerent, bellicose, rebel).

GRADE SEVEN ELA SCOPE AND SEQUENCE

Unit 2			
<p><b>Key Ideas and Details</b>  <b>RI.7.1</b> Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.  <b>RI.7.2</b> Determine two or more central ideas in a text and analyze their development over the course of the text; provide an objective summary of the text.  <b>Craft and Structure</b>  <b>RI.7.3</b> Analyze the interactions between individuals, events, and ideas in a text (e.g., how ideas influence individuals or events, or how individuals influence ideas or events).  <b>RI.7.4</b> Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; analyze the impact of a specific word choice on meaning and tone.</p>	<p><b>Research to Build and Present Knowledge</b>  <b>W.7.7</b> Conduct short research projects to answer a question, drawing on several sources and generating additional related, focused questions for further research and investigation.  <b>W.7.8</b> Gather relevant information from multiple print and digital sources, using search terms effectively; assess the credibility and accuracy of each source; and quote or paraphrase the data and conclusions of others while avoiding plagiarism and following a standard format for citation.</p>	<p><b>Comprehension and Collaboration</b>  <b>SL.7.2</b> Analyze the main ideas and supporting details presented in diverse media and formats (e.g., visually, quantitatively, orally) and explain how the ideas clarify a topic, text, or issue under study.</p>	<p><b>Conventions of Standard English</b>  <b>L.7.1</b> Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.                      b. Choose among simple, compound, complex, and compound-complex sentences to signal differing relationships among ideas.  <b>L.7.2</b> Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.                      b. Spell correctly.  <b>Vocabulary Acquisition and Use</b>  <b>L.7.4</b> Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 7 reading and content, choosing flexibly from a range of strategies.                      a. Use context (e.g., the overall meaning of a sentence or paragraph; a word's position or function in a sentence) as a clue to the meaning of a word or phrase.                      b. Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., belligerent, bellicose, rebel).</p>

GRADE SEVEN ELA SCOPE AND SEQUENCE

QUARTER 2					
Reading		Writing		Speaking and Listening	Language
Unit 3					
Year Long Curriculum Plan by Quarter	<b>Key Ideas and Details</b> <b>RL.7.1</b> Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.		<b>Text Types and Purposes</b> <b>W.7.3</b> Write narratives to develop real or imagined experiences or events using effective technique, relevant descriptive details, and well-structured event sequences.		<b>Conventions of Standard English</b> <b>L.7.1</b> Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. a. Explain the function of phrases and clauses in general and their function in specific sentences. <b>L.7.2</b> Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. b. Spell correctly.  <b>Vocabulary Acquisition and Use</b> <b>L.7.4</b> Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 7 reading and content, choosing flexibly from a range of strategies. b. Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., belligerent, bellicose, rebel). c. Consult general and specialized reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation of a word or determine or clarify its precise meaning or its part of speech.
	<b>Craft and Structure</b> <b>RL.7.4</b> Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of rhymes and other repetitions of sounds (e.g., alliteration) on a specific verse or stanza of a poem or section of a story or drama.		a. Engage and orient the reader by establishing a context and point of view and introducing a narrator and/or characters; organize an event sequence that unfolds naturally and logically.		
	<b>RL.7.5</b> Analyze how a drama's or poem's form or structure (e.g., soliloquy, sonnet) contributes to its meaning.		b. Use narrative techniques, such as dialogue, pacing, and description, to develop experiences, events, and/or characters.		
	<b>Integration of Knowledge and Ideas</b> <b>RL.7.7</b> Compare and contrast a written story, drama, or poem to its audio, filmed, staged, or multimedia version, analyzing the effects of techniques unique to each medium (e.g., lighting, sound, color, or camera focus and angles in a film).		c. Use a variety of transition words, phrases, and clauses to convey sequence and signal shifts from one time frame or setting to another.		
			d. Use precise words and phrases, relevant descriptive details, and sensory language to capture the action and convey experiences and events.		
			e. Provide a conclusion that follows from and reflects on the narrated experiences or events.		

## GRADE SEVEN ELA SCOPE AND SEQUENCE

				<p><b>L.7.5</b> Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.</p> <ul style="list-style-type: none"> <li>a. Interpret figures of speech (e.g., literary, biblical, and mythological allusions) in context.</li> <li>b. Use the relationship between particular words (e.g., synonym/antonym, analogy) to better understand each of the words.</li> </ul>
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GRADE SEVEN ELA SCOPE AND SEQUENCE

Unit 4			
<p><b>Key Ideas and Details</b>  <b>RI.7.1</b> Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.</p> <p><b>Craft and Structure</b>  <b>RI.7.4</b> Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; analyze the impact of a specific word choice on meaning and tone.</p> <p><b>RI.7.5</b> Analyze the structure an author uses to organize a text, including how the major sections contribute to the whole and to the development of the ideas.</p> <p><b>Integration of Knowledge and Ideas</b>  <b>RI.7.9</b> Compare and contrast a fictional portrayal of a time, place, or character and a historical account of the same period as a means of understanding how authors of fiction use or alter history.</p>	<p><b>W.7.9</b> Draw evidence from literary or informational texts to support analysis, reflection, and research.</p> <p>b. Apply grade 7 Reading standards to literary nonfiction (e.g. “Trace and evaluate the argument and specific claims in a text, assessing whether the reasoning is sound and the evidence is relevant and sufficient to support the claims”).</p>	<p><b>Comprehension and Collaboration</b>  <b>SL.7.1</b> Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grade 7 topics, texts, and issues, building on others’ ideas and expressing their own clearly.</p> <p>a. Come to discussions prepared, having read or researched material under study; explicitly draw on that preparation by referring to evidence on the topic, text, or issue to probe and reflect on ideas under discussion.</p> <p>b. Follow rules for collegial discussions, track progress toward specific goals and deadlines, and define individual roles as needed.</p> <p>c. Pose questions that elicit elaboration and respond to others’ questions and comments with relevant observations and ideas that bring the discussion back on topic as needed.</p> <p>d. Acknowledge new information expressed by others and, when warranted, modify their own views.</p>	<p><b>Conventions of Standard English</b>  <b>L.7.1</b> Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.</p> <p>a. Explain the function of phrases and clauses in general and their function in specific sentences.</p> <p><b>L.7.2</b> Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p>b. Spell correctly.</p> <p><b>Vocabulary Acquisition and Use</b>  <b>L.7.4</b> Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 7 reading and content, choosing flexibly from a range of strategies.</p> <p>b. Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., belligerent, bellicose, rebel).</p> <p>c. Consult general and specialized reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation of a word or determine or clarify its precise meaning or its part of speech.</p> <p><b>L.7.5</b> Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.</p> <p>a. Interpret figures of speech (e.g., literary, biblical, and mythological allusions) in context.</p>

## GRADE SEVEN ELA SCOPE AND SEQUENCE

				b. Use the relationship between particular words (e.g., synonym/antonym, analogy) to better understand each of the words.
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SAMPLE

GRADE SEVEN ELA SCOPE AND SEQUENCE

QUARTER 3					
Reading		Writing	Speaking and Listening		Language
Unit 5					
Year Long Curriculum Plan by Quarter	<p><b>Key Ideas and Details</b></p> <p><b>RL.7.1</b> Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.</p> <p><b>RL.7.3</b> Analyze how particular elements of a story or drama interact (e.g., how setting shapes the characters or plot).</p> <p><b>Craft and Structure</b></p> <p><b>RL.7.4</b> Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of rhymes and other repetitions of sounds (e.g., alliteration) on a specific verse or stanza of a poem or section of a story or drama.</p>	<p><b>Research to Build and Present Knowledge</b></p> <p><b>W.7.9</b> Draw evidence from literary or informational texts to support analysis, reflection, and research.</p> <p>a. Apply grade 7 Reading standards to literature (e.g., “Analyze how particular elements of a story or drama interact”).</p>	<p><b>Comprehension and Collaboration</b></p> <p><b>SL.7.1</b> Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grade 7 topics, texts, and issues, building on others’ ideas and expressing their own clearly.</p> <p>a. Come to discussions prepared, having read or researched material under study; explicitly draw on that preparation by referring to evidence on the topic, text, or issue to probe and reflect on ideas under discussion.</p> <p>b. Follow rules for collegial discussions, track progress toward specific goals and deadlines, and define individual roles as needed.</p> <p>c. Pose questions that elicit elaboration and respond to others’ questions and comments with relevant observations and ideas that bring the discussion back on topic as needed.</p> <p>d. Acknowledge new information expressed by others and, when warranted, modify their own views.</p>		<p><b>Conventions of Standard English</b></p> <p><b>L.7.1</b> Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.</p> <p>c. Place phrases and clauses within a sentence, recognizing and correcting misplaced and dangling modifiers.*</p> <p><b>L.7.2</b> Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p>a. Use a comma to separate coordinate adjectives (e.g., It was a fascinating, enjoyable movie but not He wore an old[,] green shirt).</p> <p>b. Spell correctly</p> <p><b>Vocabulary Acquisition and Use</b></p> <p><b>L.7.5</b> Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.</p> <p>c. Distinguish among the connotations (associations) of words with similar denotations (definitions) (e.g., refined, respectful, polite, diplomatic, condescending).</p>

GRADE SEVEN ELA SCOPE AND SEQUENCE

Unit 6			
<p><b>Key Ideas and Details</b>  <b>RI.7.1</b> Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.</p> <p><b>Craft and Structure</b>  <b>RI.7.4</b> Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; analyze the impact of a specific word choice on meaning and tone.</p> <p><b>Integration of Knowledge and Ideas</b>  <b>RI.7.6</b> Determine an author’s point of view or purpose in a text and analyze how the author distinguishes his or her position from that of others.  <b>RI.7.8</b> Trace and evaluate the argument and specific claims in a text, assessing whether the reasoning is sound and the evidence is relevant and sufficient to support the claims.</p>	<p><b>Text Types and Purposes</b>  <b>W.7.2</b> Write informative/explanatory texts to examine a topic and convey ideas, concepts, and information through the selection, organization, and analysis of relevant content.</p> <p>a. Introduce a topic clearly, previewing what is to follow; organize ideas, concepts, and information, using strategies such as definition, classification, comparison/contrast, and cause/effect; include formatting (e.g., headings), graphics (e.g., charts, tables), and multimedia when useful to aiding comprehension.</p> <p>b. Develop the topic with relevant facts, definitions, concrete details, quotations, or other information and examples.</p> <p>c. Use appropriate transitions to create cohesion and clarify the relationships among ideas and concepts.</p> <p>d. Use precise language and domain-specific vocabulary to inform about or explain the topic.</p> <p>e. Establish and maintain a formal style.</p> <p>f. Provide a concluding statement or section that follows from and supports the information or explanation presented.</p>	<p><b>Presentation of Knowledge and Ideas</b>  <b>SL.7.4</b> Present claims and findings, emphasizing salient points in a focused, coherent manner with pertinent descriptions, facts, details, and examples; use appropriate eye contact, adequate volume, and clear pronunciation.</p> <p><b>SL.7.5</b> Include multimedia components and visual displays in presentations to clarify claims and findings and emphasize salient points.</p> <p><b>SL.7.6</b> Adapt speech to a variety of contexts and tasks, demonstrating command of formal English when indicated or appropriate.</p>	<p><b>Conventions of Standard English</b>  <b>L.7.1</b> Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.</p> <p>c. Place phrases and clauses within a sentence, recognizing and correcting misplaced and dangling modifiers.*</p> <p><b>L.7.2</b> Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p>a. Use a comma to separate coordinate adjectives (e.g., It was a fascinating, enjoyable movie but not He wore an old[,] green shirt).</p> <p>b. Spell correctly</p> <p><b>Vocabulary Acquisition and Use</b>  <b>L.7.5</b> Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.</p> <p>c. Distinguish among the connotations (associations) of words with similar denotations (definitions) (e.g., refined, respectful, polite, diplomatic, condescending).</p>

GRADE SEVEN ELA SCOPE AND SEQUENCE

		<p><b>Production and Distribution of Writing</b></p> <p><b>W.7.5</b> With some guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on how well purpose and audience have been addressed.</p> <p><b>W.7.6</b> Use technology, including the Internet, to produce and publish writing and link to and cite sources as well as to interact and collaborate with others, including linking to and citing sources.</p>		
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SAMPLE

GRADE SEVEN ELA SCOPE AND SEQUENCE

QUARTER 4					
Reading		Writing		Speaking and Listening	Language
<b>Unit 7</b>					
<b>Year Long Curriculum Plan by Quarter</b>	<p><b>Key Ideas and Details</b>  <b>RI.7.1</b> Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.</p> <p><b>Craft and Structure</b>  <b>RI.7.4</b> Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; analyze the impact of a specific word choice on meaning and tone.</p> <p><b>Integration of Knowledge and Ideas</b>  <b>RI.7.7</b> Compare and contrast a text to an audio, video, or multimedia version of the text, analyzing each medium's portrayal of the subject (e.g., how the delivery of a speech affects the impact of the words).</p> <p><b>RI.7.9</b> Analyze how two or more authors writing about the same topic shape their presentations of key information by emphasizing different evidence or advancing different interpretations of facts.</p>	<p><b>Text Types and Purposes</b>  <b>W.7.1</b> Write arguments to support claims with clear reasons and relevant evidence.</p> <p>a. Introduce claim(s), acknowledge alternate or opposing claims, and organize the reasons and evidence logically.</p> <p>b. Support claim(s) with logical reasoning and relevant evidence, using accurate, credible sources and demonstrating an understanding of the topic or text.</p> <p>c. Use words, phrases, and clauses to create cohesion and clarify the relationships among claim(s), reasons, and evidence.</p> <p>d. Establish and maintain a formal style.</p> <p>e. Provide a concluding statement or section that follows from and supports the argument presented.</p> <p><b>Research to Build and Present Knowledge</b>  <b>W.7.7</b> Conduct short research projects to answer a question, drawing on several sources and generating additional related, focused questions for further research and investigation.</p>	<p><b>Comprehension and Collaboration</b>  <b>SL.7.3</b> Delineate a speaker's argument and specific claims, evaluating the soundness of the reasoning and the relevance and sufficiency of the evidence.</p>	<p><b>Conventions of Standard English</b>  <b>L.7.2</b> Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p>a. Use a comma to separate coordinate adjectives (e.g., It was a fascinating, enjoyable movie but not He wore an old[,] green shirt).</p> <p>b. Spell correctly</p> <p><b>Knowledge of Language</b>  <b>L.7.3</b> Use knowledge of language and its conventions when writing, speaking, reading, or listening.</p> <p>a. Choose language that expresses ideas precisely and concisely, recognizing and eliminating wordiness and redundancy.*</p> <p><b>Vocabulary Acquisition and Use</b>  <b>L.7.4</b> Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 7 reading and content, choosing flexibly from a range of strategies.</p> <p>d. Verify the preliminary determination of the meaning of a word or phrase (e.g., by checking the inferred meaning in context or in a dictionary).</p> <p><b>L.7.5</b> Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.</p> <p>a. Interpret figures of speech (e.g., literary, biblical, and mythological allusions) in context.</p>	

## GRADE SEVEN ELA SCOPE AND SEQUENCE

	<p><b>W.7.8</b> Gather relevant information from multiple print and digital sources, using search terms effectively; assess the credibility and accuracy of each source; and quote or paraphrase the data and conclusions of others while avoiding plagiarism and following a standard format for citation.</p>	<p>b. Use the relationship between particular words (e.g., synonym/antonym, analogy) to better understand each of the words.</p>
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SAMPLE

GRADE SEVEN ELA SCOPE AND SEQUENCE

Unit 8		
<p><b>Key Ideas and Details</b></p> <p><b>RL.7.1</b> Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.</p> <p><b>RL.7.2</b> Determine a theme or central idea of a text and analyze its development over the course of the text; provide an objective summary of the text.\</p> <p><b>Craft and Structure</b></p> <p><b>RL.7.4</b> Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of rhymes and other repetitions of sounds (e.g., alliteration) on a specific verse or stanza of a poem or section of a story or drama.</p> <p><b>RL.7.6</b> Analyze how an author develops and contrasts the points of view of different characters or narrators in a text.</p>	<p><b>Research to Build and Present Knowledge</b></p> <p><b>W.7.9</b> Draw evidence from literary or informational texts to support analysis, reflection, and research.</p> <p>a. Apply grade 7 Reading standards to literature (e.g., “Determine a theme or central idea of a text and analyze its development over the course of the text “or Analyze how an author develops and contrasts the points of view of different characters or narrators in a text” ).</p>	<p><b>Conventions of Standard English</b></p> <p><b>L.7.2</b> Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p>a. Use a comma to separate coordinate adjectives (e.g., It was a fascinating, enjoyable movie but not He wore an old[,] green shirt).</p> <p>b. Spell correctly</p> <p><b>Knowledge of Language</b></p> <p><b>L.7.3</b> Use knowledge of language and its conventions when writing, speaking, reading, or listening.</p> <p>a. Choose language that expresses ideas precisely and concisely, recognizing and eliminating wordiness and redundancy.*</p> <p><b>Vocabulary Acquisition and Use</b></p> <p><b>L.7.4</b> Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 7 reading and content, choosing flexibly from a range of strategies.</p> <p>d. Verify the preliminary determination of the meaning of a word or phrase (e.g., by checking the inferred meaning in context or in a dictionary).</p> <p><b>L.7.5</b> Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.</p> <p>a. Interpret figures of speech (e.g., literary, biblical, and mythological allusions) in context.</p>

## GRADE SEVEN ELA SCOPE AND SEQUENCE

				b. Use the relationship between particular words (e.g., synonym/antonym, analogy) to better understand each of the words.
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### Objectives Assessed Throughout the Year

<p><b>Range of Reading and Text Complexity</b></p> <p><b>RL.7.10</b> By the end of the year, read and comprehend literature, including stories, dramas, and poems, in the grades 6–8 text complexity band proficiently, with scaffolding as needed at the high end of the range.</p> <p><b>RI.7.10</b> By the end of the year, read and comprehend literary nonfiction in the grades 6–8 text complexity band proficiently, with scaffolding as needed at the high end of the range.</p> <p><b>Production and Distribution of Writing</b></p> <p><b>W.7.4</b> Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)</p> <p><b>Range of Writing</b></p> <p><b>W.7.10</b> Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.</p> <p><b>Vocabulary Acquisition and Use</b></p> <p><b>L.7.6</b> Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases; gather vocabulary knowledge when considering a word or phrase important to comprehension or expression.</p>
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# MORAL FOCUS RESOURCES

## Grade One Book List

### Wisdom: Conscience

- *Manana, Iguana* by Ann Whitford Paul
- *Julius, The Baby of the World* by Kevin Henkes
- *Jamaica's Find* by Juanita Havill

### Respect: Courtesy

- *Are you Quite Polite* by Alan Katz
- *Library Lion* by Michelle Knudsen
- *Stellaluna* by Janell Cannon
- *Shark in the Dark* by Peter Bentley

### Gratitude: Thankfulness

- *Dear Juno* by Soyung Pak
- *A Splendid Friend Indeed* by Suzanne Bloom

### Self-control: Patience

- *Katie Loves the Kittens* by John Himmelman
- *Llama Llama mad at Mama* by Anna Dewdney
- *Stop, Drop, and Chill* by Derrick D. Barnes
- *Today I Feel Silly & Other Moods that Make My Day* by Jamie Lee Curtis

### Perseverance: Determination

- *The Biggest Pumpkin Ever* by Steven Kroll
- *The Little Red Hen* by Lucinda McQueen
- *Whistle for Willie* by Ezra Jack Keats

### Courage: Confidence

- *Scaredy Squirrel* by Melanie Watt
- *A Bad Case of the Stripes* by David Shannon
- *There's Something in my Attic* by Mercer Mayer
- *The Carrot Seed* by Ruth Krauss

### Encouragement: Friendliness

- *Fox Makes Friends* by Adam Relf
- *Miss Spider's Tea Party* by David Kirk
- *Fluffy and Baron* by Laura Rankin
- *Fox and His Friends* by Edward Marshall

### Compassion: Kindness

- *Chicken of the Family* by Mary Amato
- *Mine! Mine! Mine!* By Shelly Becker
- *Have you Filled a Bucket Today?* By Carol McCloud
- *The Lunch Box Surprise* by Grace Maccarone

### Integrity: Honesty

- *Carlos and the Squash Plant* by Jan Romero Stevens
- *My Big Lie* by Bill Cosby
- *The Berenstain Bears and the Truth* by Stan and Jan Berenstain

### Additional Teacher Resources (K-5)

- *Teaching Character . . . It's Elementary* by Sadie Allran Broome, Nancy W. Henley
- *Building Moral Intelligence* by Michele Borba
- *Parents Do Make a Difference* by Michele Borba
- *Character Matters* by Thomas Lickona
- *What do you Stand For? A Guide to Building Character for Kids* by Barbara A. Lewis
- *What Kids Need to Succeed* by Peter L. Benson

# MORAL FOCUS RESOURCES

## Grade Four Book List

### Wisdom: Good Judgment

- *The Biggest Bear* by Lynd Ward
- *Sorry!* by Trudy Ludwig
- *A Dog Called Kitty* by Bill Wallace

### Respect: Fairness

- *Wings* by Christopher Myers
- *Teammates* by Peter Goldenbock

### Gratitude: Contentment

- *The Seven Chinese Brothers* by Margaret Mahy
- *Drita My Homegirl* by Jenny Lombard

### Self-control: Delay of Gratification

- *Any Small Goodness* by Tony Johnson
- *Chair for My Mother* by Vera B. Williams
- *Long Winter* by Laura Ingalls Wilder

### Perseverance: Endurance

- *Chicken Sunday* by Patricia Polacco
- *Wilma Unlimited* by Kathleen Jrull
- *Muggie Maggie* by Beverly Cleary

### Courage: Resilience

- *Perloo the Bold* by AVI
- *Sadako and the Thousand Paper Cranes* by Eleanor Coerr
- *The Castle in the Attic* by Elizabeth Winthrop

### Encouragement: Thoughtfulness

- *Stone Fox* by John Reynolds Gardiner
- *Granny Torelli makes Soup* by Sharon Creech

### Compassion: Caring

- *Judy Moody Saves the World* by Megan McDonald
- *The Family Under the Bridge* by Natalie Carlson
- *The Can Man* by Laura E. Williams

### Integrity: Responsibility

- *Class President* by Johanna Hurwitz
- *Justin and the Best Biscuits in the World* by Mildred Pitts Walter
- *The Indian in the Cupboard* by Lynne Ried Banks

### Additional Teacher Resources (K-5)

- *Teaching Character . . . It's Elementary* by Sadie Allran Broome, Nancy W. Henley
- *Building Moral Intelligence* by Michele Borba
- *Parents Do Make a Difference* by Michele Borba
- *Character Matters* by Thomas Lickona
- *What do you Stand For? A Guide to Building Character for Kids* by Barbara A. Lewis
- *What Kids Need to Succeed* by Peter L. Benson

# MORAL FOCUS RESOURCES

## Grade Seven Book List

### Wisdom: Discernment

- *The Trouble with Tuck* by Theodore Taylor
- *The Giver* by Lois Lowry
- *The Little Prince* by Antoine de Saint-Exupery

### Respect: Tolerance

- *The Pushcart War* by Jean Merrill
- *Pacific Crossing* by Gary Soto
- *Dear Mrs. Parks: a Dialogue with Today's Youth* by Rosa Parks

### Gratitude: Appreciation

- *Bluish* by Virginia Hamilton

### Self-control: Self-discipline

- *Homecoming* by Cynthia Voigt
- *Joey Pigza Swallowed the Key* by Jack Gantos
- *Hatchet* by Gary Paulsen
- *Make Lemonade* by Virginia Euwer Wolff

### Perseverance: Flexibility

- *Out of the Dust* by Karen Hesse
- *Timothy of the Cay* by Theodore Taylor
- *Esperanza Rising* by Pam Munoz Ryan

### Courage: Assertiveness

- *I am a Star: Child of the Holocaust* by Inge Auerbacher
- *My Side of the Mountain* by Jean Craighead George
- *Roll of Thunder, Hear my Cry* by Mildred Taylor

### Encouragement: Generosity

- *The Great Gilly Hopkins* by Katherine Paterson
- *When Zachary Beaver Came to Town* by Kimberly Willis Holt
- *Cats in Krasinski Square* by Karen Hesse

### Compassion: Empathy

- *Crash* by Jerry Spinelli
- *Belle Prater's Boy* by Ruth White
- *Absolutely Normal Chaos* by Sharon Creech

### Integrity: Accountability

- *Miracle's Boys* by Jacqueline Woodson
- *Rescue Josh McGuire* by Ben Mikaelson
- *The Witch of Blackbird Pond* by Elizabeth George Speare

### Additional Teacher Resources

- *Building Moral Intelligence* by Michele Borba
- *Parents Do Make a Difference* by Michele Borba
- *Character Matters* by Thomas Lickona
- *What do you Stand For? A Guide to Building Character for Kids* by Barbara A. Lewis
- *What Kids Need to Succeed* by Peter L. Benson

# KINDERGARTEN MATH STORIES



VOLUME 1

National  
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## Introduction

Math stories are daily practices that allow students time to **solve problems in a way that makes sense to them, before a direct teacher model**. Students are expected and encouraged to solve problems using strategies that make sense to them. They are provided time to construct understanding through solving problems, collaborating with peers, and sharing solution strategies with the rest of the class.

The key idea in math stories is that students are provided an opportunity to solve a story problem **before** the teacher has modeled specific strategies to solve a problem. An essential idea for executing math stories is that as long as students can *count* and can *make sense* of a problem, they are able to solve any problem, often through using direct modeling and counting strategies, even before they begin to learn formal algorithmic procedures.

### Essential Idea

**As long as students can COUNT and MAKE SENSE of a problem, they can solve any problem that is presented to them by visualizing the problem and directly modeling with concrete objects or pictures. These strategies eventually evolve into counting strategies and number fact strategies, which leads to math fact fluency.**



Math stories are designed to help students **make sense** of various types of addition and subtraction situation. When students visualize what happens in the story, they begin to associate images of joining and putting groups together with addition, and images of taking or giving away and separating with subtraction.

The structure of math stories builds the expectation that solving a problem takes time. It is necessary to think through the problem, figure out what is known, and determine what question is asked before you start to act on the numbers. The **process** of problem solving is just as important as arriving to a correct answer.

### Standards for Mathematical Practice

Along with focusing on critical standards in addition and subtraction, math stories allow students to experience all of the eight math practice standards. Most notably, the math story structure gives students regular opportunities to work with the following:

- Math Practice Standard 1: Make sense of problems and persevere in solving them.
- Math Practice Standard 3: Construct viable arguments and critique the reasoning of others.
- Math Practice Standard 4: Model with mathematics.
- Math Practice Standard 5: Use appropriate tools strategically.

Teachers should work to establish a classroom culture that promotes students' ability to engage in these and all the math practice standards. This requires creating a culture where **mistakes** are expected and valued as learning opportunities. Because students are not shown **how** to solve number stories, students will regularly

encounter productive struggle, and will practice making sense of problems and will persevere in solving them each day.

Students are encouraged and expected to share their thinking and listen to the ideas of others, to pose and answer questions, and to explore and become familiar with mathematical tools. These tools are intentionally selected to highlight the mathematical concepts to be pursued in the lesson.

### **Introducing Math Stories**

In order to solve story problems, student must be able to visualize the situation and understand what is being asked. Therefore, the math stories structure asks students to picture the story in their mind, to retell it in their own words, and to model it. The focus is that students make sense of the problem, therefore teachers should avoid labeling problems as addition or subtraction for students. A critical skill of sense making is determining what operation is needed. Additionally, many problems can be solved in a variety of ways. We want to provide opportunities for students to choose a solution strategy that makes sense to them, based on their understanding of the situation. Some students may decide to directly model the story with concrete objects, such as counters or cubes. Others may choose to start by drawing a picture that represents the story. Both strategies are appropriate, and students should be given the opportunity to use the strategy that comes naturally.

### **Supporting Students During Problem Solving**

Students should be encouraged to show their work with objects, pictures, numbers, words, and, if they are ready, equations.

**Objects:** Manipulatives often come with a misconception that they should only be used by struggling or below grade-level students. When encountering new types of problems or working with larger numbers than they are used to, the majority of students naturally need to use objects to help them directly model and made sense of situations, even students who may have exhibited what appears to be “mastery” with a problem type they have been working with for a while. Manipulatives should be, at least, stored and made available in a way that they can easily be accessed by students if needed.

**Pictures:** Many students will initially draw each of the actual objects described in the math story. One goal for these students is to help them attach numbers to their work. You might ask how many objects are in each group, and then help the student label the groups with a number. Another goal is to move these students to use more efficient methods of recording. For example, students will need to understand what is important to show in math versus art class. For some students, this may mean drawing pictures with less detail. For other students, this may mean drawing a counter, cube, or tally to represent the objects in the story. Either way, students should use a representation that makes sense to them.

**Numbers and Equations:** It can be tricky to figure out how these students are solving the problem and to assess what they understand. Ask questions such as, “I see these three numbers here. Can you tell me what they mean?”

**Words:** If students write “I just knew” or “I counted”, then encourage them to explain *how* they counted. You might ask questions such as, “Where did you start counting? What numbers did you say when you counted? Where did you stop? How did you know when to stop?” After asking these questions, model how they might record their answer on paper.

It can be challenging for students to record the actual strategy they used to solve the problem. For example, a student may use the count on strategy to solve, but his/her written work suggests counting all. Ask students to explain their strategy, and help them think about how they might show that.

### Recording Student Strategies

How the teacher records will give students models for how they can record their work. Whenever possible, base your recording on the way the student recorded.

Tammy found 4 pencils.  
James found 2 pencils.  
How many pencils did they find?

**Corey's strategy**

Tammy's pencils: 1, 2, 3, 4  
James' pencils: 5, 6

**Danae's strategy**

1, 2, 3, 4 (Tammy's pencils)  
5, 6 (James' pencils)

**Isaiab's strategy**

James' pencils: □, □  
Tammy's pencils: 3, 4, 5, 6  
2

**Jasmine's strategy**

Tammy's pencils: □, □, □, □  
James' pencils: 5, 6  
4

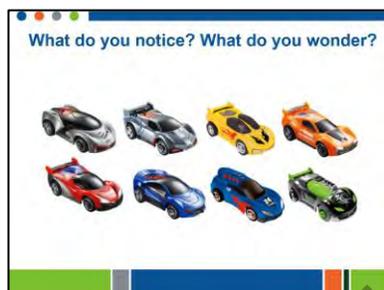
# MATH STORY STRUCTURE OVERVIEW

## Engage

 3-4 minutes

1

Show the Engage image from PowerPoint [see myNHA Curriculum app]. This will allow students to begin thinking about the context of the math story.



 **Look at this picture. I want you to take 15 seconds to think about what you notice and what you wonder.**

2

Use a **Think-Pair-Share** structure (see *Best Practices*) to have students share:

 **Share with your partner what you notice and wonder about the picture.**

3

Use an attention signal to bring students back to the whole group. Have 4-5 students share out for each. Accept any and all responses, as this will validate student thinking.

4

Record the students' notices and wonderings on the board or chart paper.

**Note:** It is not required to record notices/wonderings every day, however it should be done often at the beginning of the year and at least 2-3 times per week throughout the remainder of the year.



## Best Practices

- It is suggested that students be seated in a carpet area for this part of the math story. This will create an engaging and comfortable setting for students to discuss ideas and set the stage for the problem they will later solve.
- Preplan a structure for the **Think-Pair-Share** and be very explicit with the directions.  
*Example: (After giving think time...)*

 **Turn to your partner to share what you noticed. The partner who [has the most letters in their name] will go first. You will have [20 seconds] to share, I will tell you when to switch. Go!**

**Problem** **10-12 minutes****1 Visualize**

Visualizing helps students to make sense of the problem they are about to work with. In the Engage, students viewed a picture that is connected to the math story for the day. Now you will ask students to visualize the context of the math story.

 ***I'm going to tell you a story. I want you to close your eyes and try to see it in your mind as I tell it. Example: Leah has 4 toy cars. James gave her 5 toy cars.***

**Note:** For this first read, tell the math story without the question while students visualize. The story also appears on the slide following the Engage image.

**2 Retell**

Having students think about the story they just heard and retell it to a partner will, again, allow students to make sense of what is happening in the story. This will later help students when it comes time to solve the actual problem.

Use a **Think-Pair-Share** structure (see *Best Practices in Engage*) to have students retell the story:

 **Think: Open your eyes and think about what you heard in the story. What did you hear first? What did you hear next? Give students some short think time.**

**Pair: Turn to your partner. Give students guidance on who will share first.**

**Share: You and your partner will have [30 seconds] to share what you heard in the story. Go!**

Use an attention signal to bring students back whole group. Ask 3-4 students to tell what they remember about the story. Even if one student tells the entire story correctly, ask a few more students to share out as well. The focus is on what students visualized in the story, not necessarily on retelling it exactly as it was told. If necessary, guide students' retelling by asking **What did you hear first? What did you hear next?**

If students are seated at the floor still, this would be a good time to send them back to their seats.

**3 Pose the Problem**

Reread the math story one more time, this time asking the question at the end. The question can also be brought up on the math story slide at this point.

 ***Now I'm going to tell you the story again, but this time I have a question I want you to think about. Example: Leah has 4 toy cars. James gave her 5 toy cars. How many toy cars does Leah have now?***

## 4 Make Sense

Pose a **Think-Pair-Share** question (*see example below*) to allow students to estimate and/or explore reasonable solutions before beginning to solve the problem.

 **Example: Do you think there will there be more than 5 cars or less than 5 cars? How do you know? Turn and talk with a partner about what you think and why.**

**Note:** This is **not** the point to discuss with students what operation should be used to solve or what an equation for this problem would be.

## 5 Solve

Students are now given time to model the problem using manipulatives and/or pictures. They should also document their work and strategy on the student recording page.\*

The teacher should **not** model how to solve the problem or tell students what equation to use. Students should focus on the context of the story to choose a strategy to solve that makes sense to them.

 **Now I want you to think about our story use manipulatives or pictures to model the problem and show your solution strategy. If you use manipulatives, draw a picture of what you did with your manipulatives.**

Students can begin by working on their own to solve the problem, but should be given the option to work collaboratively. All students should be given the opportunity to share their strategy or clarify their thinking with a peer before the whole group discussion.

**\*Note:** When looking at the pacing calendars for each unit, math stories that are highlighted green will not have a student recording page available. This is designed purposefully, as students are encountering a new problem or working within a larger total on a familiar problem type.

## 6 Circulate and Ask Questions

Circulate, listen, and observe student thinking. While it may feel natural to focus on whether students are getting the problem correct or not, the focus should be shifted more toward looking for and seeking to understand students' strategies. Support students' attempts at the problem, even if the strategy is inefficient, to validate and build from their thinking. Ask probing questions (*see examples below*) to clarify student thinking, determine solving strategies, and keep students connected to the **context** of the math story.

 **Examples: What do we know in the problem? How could you use the manipulatives to show [detail from math story]? How did you count these? What part of the story does this show?**

**Remember this is not the time to FIX the mathematician, but to DEVELOP them.**

While circulating, listen to students talk about their strategy to determine who will share during the discussion and in what sequence.

## 7

## Choose

Identify 2-4 students who you will have share in the discussion based on the strategies you have *anticipated* and pre-planned to highlight. While *monitoring* student work, *select* the students to share. Decide the *sequence* in which students will share based on the progression of strategies so that you can make appropriate *connections*.

Leah has 4 toy cars. James gave her 5 toy cars. How many toy cars does Leah have now?

Strategy 1:  $\begin{array}{cccc} 0000 & 00000 \\ 1234 & 56789 \end{array}$

Strategy 2:  $\begin{array}{cccc} \boxed{0000} & 00000 \\ 4 & 56789 \end{array}$

Strategy 3: 4+4 is 8, so 1 more makes 9



## Best Practices

- In order to make the math story more engaging, it is suggested to embellish the story with student names, teacher names, and other relatable details. Make the story connect to you or your students.

Original Math Story	Embellished Math Story
Leah has 4 toy cars. James gave her 5 toy cars. How many toy cars does Leah have now?	I noticed while we were having indoor recess today that you were all playing with different things. I saw Leah and James playing with cars. Leah had 4 cars when she started playing. Then James decided he wanted to play with something else, so he gave his 5 cars to Leah. How many cars did Leah have then?

- While observing students and determining who will share during the discussion, put a numbered sticky note on students' desk in the order that they will share.

## Discussion

5-7 minutes

## 1

## Students Share Strategies

Ask the 2-4 pre-determined students to share their strategies for solving the problem using the pre-planned sequence. Students should have their student recording page and/or manipulatives projected under the document camera as they talk through their strategies.

**2****Teacher Records Student Strategies & Poses Questions**

As students share their thinking, the teacher should record their strategies on chart paper or the whiteboard to capture the students' thought processes and have to refer back to during discussion. Pose questions to clarify each student's strategy and connect the work back to the problem.



*Examples: What part of the math story does this part of your picture represent? How did count your connecting cubes (e.g., counting all, counting on, etc.)?*

**3****Students Discuss, Analyze and Compare Strategies**

Pose a **Think-Pair-Share** to allow students to discuss, analyze and/or compare strategies to make connections (see examples below).

The following options can help facilitate a meaningful student discussion:

- Give students a focus as classmates are sharing to find one thing that is **similar** and/or one thing that is **different** about the strategy compared to their strategy.
- Have students show a thumb up if they used the same or similar strategy.
- Have students retell the strategy shared in their own words:
  - **Turn to your partner and explain the strategy \_\_\_\_\_ used to solve.**
- Encourage students to ask the student who is sharing a clarifying or probing question about his/her strategy.

**4****Teacher Connects Strategies to Equations**

This is the point in the math story where it is most appropriate to discuss equations if students have not used them to represent their thinking **on their own**. Discussing an equation now, rather than earlier in the math story process, ensures that the equation will match the student work versus students trying to match their work to an equation.



*Example: Let's think about this strategy and the picture, how could we show what [student] did with numbers also.*

Initially, the teacher should model writing the equation, connecting each part to the picture and story. As students begin representing their thinking with numbers, the teacher should question students about the connection of each part of the equation to the story.

**Best Practices**

- Prior to the whole group discussion, consider having students share strategies with a partner.
- It is suggested that students be seated in a carpet area for this part of the math story. This will create an engaging and comfortable setting for students to discuss ideas. It will also limit the distraction of manipulatives and other materials as strategies are being shared.

## Key Points

 2-3 minutes

1

This is where the teacher will make an explicit and pre-planned connection from the student strategies to the big mathematical idea for the day/week/unit. The teacher should always try to build off student thinking and connect to mathematical ideas at the conclusion of the math story. The ultimate goal is to begin building procedural fluency from conceptual understanding.

This is the point in the lesson where the teacher is creating or finalizing an anchor chart that was started in the discussion. This anchor chart highlights key strategies that can be used in later math stories.

Specific examples and suggestions for Key Points will be provided for individual math stories throughout the year and will change as the focus on different problem types and strategies change.

 Example: *I noticed there were two strategies that used counting (see Strategies 1 and 2 in step 7 of Problem), let's look a little closer at those two strategies.*

*Remember in the first strategy, [student] counted like this: 1, 2, 3, 4, 5, 6, 7, 8, 9.*

*In the second strategy, [student] counted like this: 4, 5, 6, 7, 8, 9.*

Teacher may then use a **Think-Pair-Share** to have students discuss how the strategies are similar and different.

*We found out that both strategies helped us figure out that Leah had 9 cars.*

*In the first strategy, we counted all of Leah's cars and the cars James gave her.*

*In the second strategy though, we remembered that Leah had 4, so we didn't have to count them again. Instead we just counted on from 4 and that took less time to count!*

2

Wrap-up the math story by articulating what students did today and how it connects to big mathematical ideas and the 'I can' statement.

 Example: *"Boys and girls, today you solved an equal groups problem by modeling the problem and then using skip counting or repeated addition to get the total."*

## Practice Problem

An additional problem is available, but not required to be used, for each math story. This problem follows the same problem type and works with similar numbers. The practice problem can be used to encourage students to try a different strategy. This could also be used as an exit ticket/formative assessment.

# Kindergarten Scope & Sequence

**\*Note:** Numeracy Assessment windows are approximate. Exact dates will vary by school.

		Week	Math Story Focus	Math Expressions
	1	<b>Unit 1</b>	Exploring Manipulatives  K.CC.3, K.CC.4, K.CC.4a, K.CC.4b Grab and Count	Unit 1: Lessons 1-3
	2			Unit 1: Lessons 4-7, 9
	3			Unit 1: Lessons 8 & 10
	4			Unit 1: Lesson 11-13
	5			Unit 1: Lessons 14-17
	6			Unit 1: Lesson 17-18
<b>Unit 1 Assessment</b>				
<b>Numeracy Assessment Fall Window*</b>	7	<b>Unit 2</b>	K.CC.3, K.CC.4, K.CC.4a, K.CC.4b, K.CC.5 The Counting Jar	Unit 2: Lessons 1-4
	8			Unit 2: Lessons 5-9
	9			Unit 2: Lessons 9-12
	10			Unit 2: Lessons 13-15
	11			Unit 2: Lessons 15-18
	12			Unit 2: Lessons 19-20
<b>Unit 2 Assessment</b>				

	Week	Math Story Focus	Math Expressions	
	13	<b>K.OA.1, K.OA.2</b> Add To [Result Unknown] – Within 10	Unit 3: Lessons 1-3	
	14		Unit 3: Lesson 5-8	
	15	<b>K.OA.1, K.OA.2</b> Take From [Result Unknown] – Within 10	Unit 3: Lesson 9-11	
	16		Unit 3: Lesson 12-14	
	17	<b>K.OA.1, K.OA.2</b> Mixed Review: Add To/Take From [Result Unknown] – Within 10	Unit 3: Lessons 15-18	
	18		Unit 3: Lesson 18-20	
	19		Unit 3: Lesson 21	
	<b>Unit 3 Assessment</b>			
	Numeracy Assessment Winter Window*	20	<b>K.OA.1, K.OA.2</b> Put Together [Result Unknown] – Within 10	Unit 4: Lessons 1-4
		21		Unit 4: Lessons 5-8
22		<b>K.OA.1, K.OA.2, K.OA.3</b> Put Together/Take Apart [Both Addends Unknown – Within 10	Unit 4: Lessons 9-11	
23			Unit 4: Lessons 11-13	
24		<b>K.OA.1, K.OA.2</b> Mixed Review: Add To/Take From, Put Together [Result Unknown] – Within 10	Unit 4: Lessons 14-18	
25			Unit 4: Lessons 19-21	
26			Unit 4: Lessons 21-22	
<b>Unit 4 Assessment</b>				

	Week	Math Story Focus	Math Expressions
	27	<b>K.OA.1, K.OA.2, K.OA.4</b> Add To [Change Unknown] – Within 10	Unit 5: Lessons 1-3
	28		Unit 5: Lesson 4-6
	29	<b>K.OA.1, K.OA.2</b> Add To/Put Together [Result Unknown] – Within 20	Unit 5: Lessons 7-9
	30		Unit 5: Lessons 10-13
	31		Unit 5: Lessons 14-17
	32		Unit 5: Lessons 17-20
Numeracy Assessment Winter Window*	33	<b>K.OA.1, K.OA.2</b> Mixed Review: Add To/Put Together, Take From [Result Unknown] – Within 20	Unit 5: Lessons 20-22
	34		Unit 5: Lesson 23
	<b>Unit 5 Assessment</b>		

# THIRD GRADE MATH STORIES



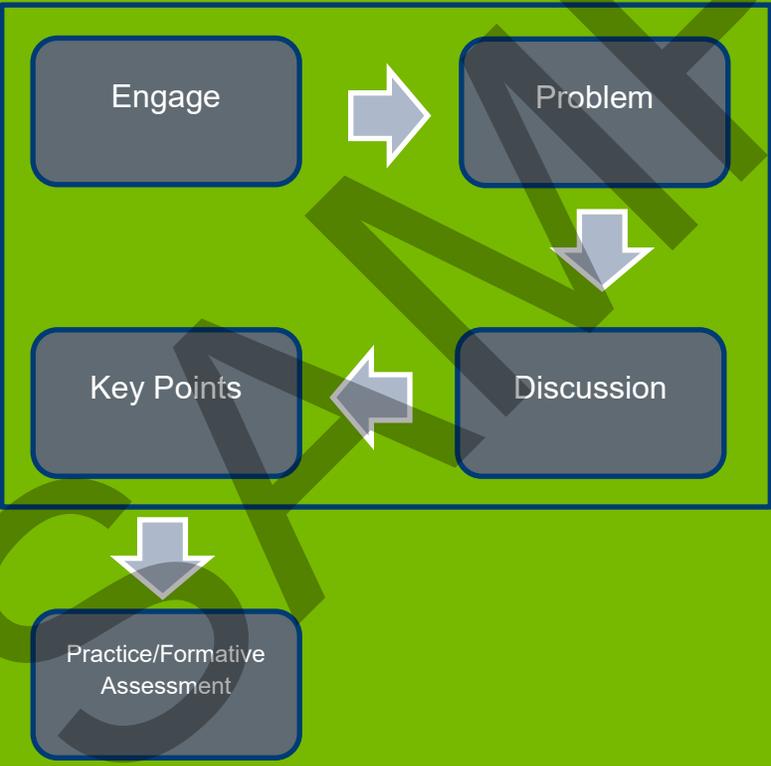
READY  
VOLUME 1

National  
Heritage  
Academies® 

## 3<sup>rd</sup> Grade Math Block Breakdown

The NHA 90 minute math block is composed of three distinct components in 3<sup>rd</sup> grade as shown in the visual below. NHA's math block structure ensure that all students are engaged in the math classroom and have access to the mathematics being taught.

Pacing and guidance for each component of the math block is provided in this book.

<h3>Snap Facts Routine</h3> <p><i>Daily Multiplication Fluency Routine</i></p>	 <b>5 minutes</b>
<h3>Math Story</h3> <p><i>Grade Level Math Story that is Accessible to ALL Students</i>  <i>The teacher facilitates the math story using the structure shown below.</i></p> <div style="border: 1px solid #0056b3; padding: 10px; margin: 10px auto; width: fit-content;">  <pre> graph TD     Engage --&gt; Problem     Problem --&gt; Discussion     Discussion --&gt; KeyPoints     KeyPoints --&gt; PracticeAssessment             </pre> </div>	 <b>30 Minutes</b>
<h3>Classroom Based Instruction</h3> <p><i>Whole Group or Small Group Instruction</i>  <i>Resource: Curricular Tool or Intervention Tool</i></p>	 <b>55 Minutes</b>

<b>3<sup>rd</sup> GRADE SCOPE &amp; SEQUENCE</b>		
PRIORITY STANDARDS ARE INDICATED WITH BLUE FONT		
<b>Week</b>	<b>Math Story Focus</b>	<b>READY Lessons</b>
<b>1</b>	<b>Unit 1</b> Understanding Multiplication 3.OA.1, 3.OA.3	<b>None: Classroom Culture and Procedures</b>
<b>2</b>	Understanding Multiplication 3.OA.1, 3.OA.3	<b>None: Classroom Culture and Procedures</b>
<b>3</b>	Understanding Multiplication 3.OA.1, 3.OA.3	Lesson 20: Tell and Write Time 3.MD.1
<b>4</b>	<b>The Relationship Between Multiplication &amp; Division</b> 3.OA.2	Lesson 21: Solve Problems About Time 3.MD.1
<b>5</b>	<b>The Relationship Between Multiplication &amp; Division</b> 3.OA.2, 3.OA.3	Lesson 22: Liquid Volume Lesson 23: Mass 3.MD.2
<b>6</b>	<b>The Relationship Between Multiplication &amp; Division</b> 3.OA.1, 3.OA.2, 3.OA.3	Lesson 24: Solve Problems Using Scaled Graphs Lesson 25: Draw Scaled Graphs 3.MD.3
<b>7</b>	<b>The Relationship Between Multiplication &amp; Division</b> 3.OA.8	Lesson 26: Measure Length and Plot Data on Line Plots 3.MD.4
<b>8</b>	<b>The Relationship Between Multiplication &amp; Division</b> 3.OA.8	<b>Interim Review</b>
<b>Interim 1 Testing Window</b>		
<b>1</b>	<b>Unit 3</b> Using Known Facts-Two Part Problems 3.OA.3, 3.OA.5, 3.OA.7	Lesson 1: Understand the Meaning of Multiplication 3.OA.1
<b>2</b>	Using Known Facts-Two Part Problems 3.OA.3, 3.OA.5, 3.OA.7	Lesson 4: Understand the Meaning of Division 3.OA.2
<b>3</b>	<b>Unit 4</b> Grid Array to Area Model & Break Apart Strategy 3.OA.2, 3.OA.3, 3.OA.5, 3.OA.7, 3.OA.8	Lesson 5: Understand how Multiplication and Division are Connected 3.OA.6

4		<b>Grid Array to Area Model &amp; Break Apart Strategy</b> 3.OA.2, 3.OA.3, 3.OA.5, 3.OA.7, 3.OA.8	Lesson 7: Understand Patterns 3.OA.9
5		<b>Multiplication and Division</b> 3.OA.4, 3.OA.6	Lesson 8: Use Place Value to Round Numbers 3.NBT.1
6	Unit 5	<b>Introduction to Fractions</b> 3.NF.1, 3.NF.2, 3.NF.3a, 3.NF.3b, 3.NF.3c	Lesson 9: Use Place Value to Add and Subtract 3.NBT.2
7		<b>Introduction to Fractions</b> 3.NF.1, 3.NF.2, 3.NF.3a, 3.NF.3b, 3.NF.3c	Lesson 11: Solve One-Step Problems Using Multiplication and Division 3.OA.3
8		<b>Introduction to Fractions</b> 3.NF.1, 3.NF.2, 3.NF.3a, 3.NF.3b, 3.NF.3c	<b>Interim Review</b>
<b>Interim 2 Testing Window</b>			
1	Unit 6	<b>Area &amp; Multiplication</b> 3.MD.6, 3.MD.7a, 3.MD.7b, 3.MD.7c, 3.MD.7d	Lesson 14: Understand What a Fraction Is 3.NF.1
2		<b>Area &amp; Multiplication</b> 3.MD.6, 3.MD.7a, 3.MD.7b, 3.MD.7c, 3.MD.7d	Lesson 15: Understand Fractions on a Number Line 3.NF.2
3		<b>Area &amp; Multiplication</b> 3.MD.6, 3.MD.7a, 3.MD.7b, 3.MD.7c, 3.MD.7d	Lesson 16: Understand Equivalent Fractions Lesson 17: Find Equivalent Fractions 3.NF.3
4		<b>Area &amp; Multiplication</b> 3.MD.6, 3.MD.7a, 3.MD.7b, 3.MD.7c, 3.MD.7d	Lesson 18: Understand Comparing Fractions Lesson 19: Use symbols to Compare Fractions 3.NF.3
5	Unit 7	<b>Multiplying by Multiples of 10 &amp; Multi-Step Problems</b> 3.OA.3, 3.NBT.3, 3.OA.8	Lesson 27: Understand Area Lesson 28: Multiply to Find Area 3.MD.5, 3.MD.6, 3.MD.7
6		<b>Multiplying by Multiples of 10 &amp; Multi-Step Problems</b> 3.OA.3, 3.NBT.3, 3.OA.8	Lesson 29: Add Areas Lesson 30: Connect Area and Perimeter 3.MD.7, 3.MD.8
7	Unit 8	<b>Mixed Review [Multiplication, Division, Multi-Step, Fractions]</b>	Lesson 31: Understand Properties of Shapes 3.G.1
8		<b>Mixed Review [Multiplication, Division, Multi-Step, Fractions]</b>	Lesson 32: Classify Quadrilaterals 3.G.1
9		<b>Mixed Review [Multiplication, Division, Multi-Step, Fractions]</b>	Lesson 33: Divide Shapes into Parts with Equal Areas 3.G.2
<b>State Testing Window</b>			

## RATIONALE FOR READY UNIT SEQUENCING

In third grade we have changed the order of the READY units for two main reasons.

First, we want to teach towards the standard, not the tool. When you look at the READY scope and sequence, we encourage you focus on the standards students are to master during this time not necessarily the specific READY lessons. In the 2018-219 Scope and Sequence, we have moved Unit 1 so that it is taught *after* Interim 1. This way students will have the appropriate amount of time to develop and make sense of multiplication concepts through Math Stories FIRST, before they get to those lessons/concepts in READY. For this reason, students will start the year in Unit 5 which focus on Time, Measurement and Graphs.

Second, we have designed the scope and sequence, so priority concepts are developed in Math Stories before they are explicitly taught in READY. In the first 8 weeks of school, Math Stories are focused on building deep foundational knowledge of multiplication and division. Students will have this understanding BEFORE encountering multiplication and division READY lessons in the second 8 weeks of school. The scope and sequence follows this same pattern for fractions as well. When you reach concepts/units in READY that you have already explored in Math Stories, you may find that you do not need all parts of every READY lesson. The READY lessons should be used to solidify understanding, introduce algorithms, and ensure all your students have mastered the objective, which could be done in small group and/or whole group format.

# MATH STORY OVERVIEW

## Engage

 4 Minutes

1

Show the Engage image from PowerPoint [see myNHA, Curriculum Tab]. This will allow students to begin thinking about the context of the Math Story.



2

Pose questions to students using a Think-Pair-Share structure:



**What do you notice about the picture?**  
**What do you wonder about the picture?**

3

Have several students share out whole group. Accept any and all responses, even non-mathematical notices and wonderings. This will validate student thinking.

4

Record the students' notices and wonderings on the board or anchor chart at least 2-3 times a week.

Notice	Wonder
group of girls	Is there a football game?
cheerleaders	Are they on a dance team?
dance team	Are they cheerleaders?
on a football field	How old are they?
more than 10 girls	



## Best Practices

- We suggest bringing students to a carpet area for this portion of the Math Story. This will create an engaging and comfortable setting as you set the stage for the problem that the students will later solve.

# Problem



12 Minutes

## 1 Visualize

Visualizing a story helps students to make sense of the problem. Students just viewed a picture that is connected to the Math Story for the day. Now you will ask students to visualize the context of the Math Story.



***“I’m going to tell you a story, and I want you to try to see it in your mind as I tell it.”***

You will first read the Math Story without the question while students visualize.

## 2 Retell

Having students think about the story they just heard and retelling it to a partner will, again, allow students to make sense of what actions are occurring in the story. This will later help students when it comes time to solve the actual problem.

Have students retell the story using a Think-Pair-Share structure:



**Think-** Have students think about what they heard in the story.

**Say:** ***What did you hear first? What did you hear next?***

**Pair- Say:** ***Turn to your partner***

**Share-** Have students share with their partner.

[ex: Partner A share what you heard first, Partner B share what you heard next.]

Bring class back together whole group and ask several students to tell what they remember about the story. Even if one student tells the story correctly, ask a few more students to share out as well. The focus is on **visualizing** what is happening in the story, not on retelling it exactly as it was told. If necessary, guide students’ retelling by asking ***What did you hear first? What did you hear next?***

## 3 Pose the Problem

Now it is time to pose the **whole** problem for students to solve. Reread the Math Story one more time, this time asking the question at the end.

## 4

**Make Sense**

Pose a *Think-Pair-Share* question (see example below) to allow students to estimate and/or explore reasonable solutions before beginning to solve the problem.



**Example:** *Do you think there will be more than 8 eyes or less than 8 eyes? How do you know? Turn and tell your partner if you think there will be more or less than 8 eyes.*

## 5

**Solve**

Have students return to their seats to model the problem using manipulatives or pictures and document the strategy they use on their student recording sheet. The teacher should **NOT** model **how** to solve the problem or what equation to use. Students should focus on the context of the story to choose a strategy to solve that makes sense to them.



**Say:** *Now that you have a visual image of what is happening in today's story, I want you to:*

1. *Think about the strategy you want to use.*
2. *Head back to your seat and use cubes or pictures to model the problem and show your solution strategy.*
3. *Work with your partner and share your solution strategy before the discussion.*

Students can begin by working on their own to solve the problem but should be given the option to work collaboratively. All students should be given the opportunity to share their strategy or clarify their thinking with a peer before the whole group discussion.

## 6

**Circulate and Ask Questions**

Circulate, listen, and observe student thinking. Support their attempt at the problem, even if it is inefficient, to validate and build from their thinking. Then ask probing questions and keep students connected to the **context** of the Math Story.



1. *What do we know in the problem?*
2. *How could you use these cubes to show the [eyes on one person]? On two people? How can that help you?*
3. *Is there a faster way you could count the number of [eyes] in your picture?*
4. *Is there another way you could find the total number of [eyes] in the picture?*

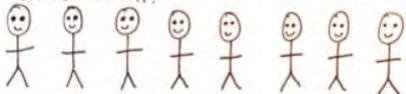
**Remember this is not the time to FIX the mathematician, but to DEVELOP them.**

As you are circulating and listening to the students talk about their strategy, be thinking about who you will choose to share their strategy during the discussion. What part of their strategy do you want to highlight? Will they share first, second, or last?

## 7 Choose

Identify 2-4 students who you will have share in the discussion based on the strategies you have pre-planned to highlight. Decide in what order they will share based on the progression of strategies.

There are 8 people on the dance team. Each person has 2 eyes. How many eyes are there in all?



① 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16

② 2, 4, 6, 8, 10, 12, 14, 16

③  $2 + 2 + 2 + 2 + 2 + 2 + 2 + 2 = 16$

## Best Practices

- When you ask students to visualize, have students close their eyes as you tell the story.
- In order to make the Math Story more engaging, we suggest embellishing the story with student names, teacher names, and other relatable details. Make the story connect to you or your students.

Original Story	Embellished Story
In a garden there are 6 rows of tulips. There are 8 tulips in each row. How many tulips are there in all?	Boys and girls, you know how I love gardening! This past Spring I planted lots of different flowers in my flower garden. One of my favorite types of flowers is a tulip. In my garden I planted 6 rows of tulips. There were 8 tulips in each row. How many tulips were there in all?

## Discussion



6 Minutes

- 1 Ask the 2-4 pre-determined students to share their strategy for solving the problem. As students share their thinking, the teacher should record their strategies on chart paper to capture the students' thinking process.

Options to facilitate student discussion:

- Teacher asks the student sharing, **WHY** they chose the strategy they did.
- Teachers asks the other students to find one thing that is **similar** and one thing that is **different** about the strategy compared to their strategy.
- Another student can ask the student who is sharing, a clarifying or probing question about their strategy.
- Other students retell the strategy in their own words.
- Show a thumbs up if you used the same or similar strategy.
- Turn to your partner and explain the strategy that \_\_\_\_ used to solve.
- Who can tell in their own words how \_\_\_\_ solved this problem?

## Key Points



3 Minutes

- 1 This is where the teacher will make an explicit and pre-planned connection from the student strategies to the big mathematical idea for the day/week/unit. Specific examples and suggestions for Key Points will be provided for individual Math Stories throughout the year and will change as the focus on different mathematics strategies change.



Example: ***“I noticed you all shared strategies that involved 8 people with two eyes each. It really helped us to use our cubes or draw pictures to then count the total number of eyes. Let’s take a look at strategy 3. Turn and talk to your partner, where do you see the ‘8 people’ and where do you see the ‘2 eyes’ represented?”***

***We are going to continue exploring how to model equal groups problems on paper, solve using different strategies AND represent with words and an equation for the rest of this week. To close out our Math Story today, you are going to solve one more problem on your own.”***

- 2 Wrap-up the Math Story by articulating what students did today and how it connects to big mathematical ideas and the I Can statement.



Example: ***“Boys and girls, today you solved an equal groups problem by modeling the problem and then using skip counting or repeated addition to get the total.”***

# Practice Problem

 5 Minutes

- 1** Students will now solve one practice problem **ON THEIR OWN**, similar to the one that was just done in the Math Story.

Give students the same expectations to solve this problem:

1. **Think about the strategy you want to use.**
2. **Use manipulatives, pictures, or numbers to model the problem and show your solution strategy.**
3. **Work independently.**

## Best Practices

- *There are different ways that this Practice Problem can be used to inform the teacher of student progress:*
  - *Collect it and scan through to identify students who are struggling with finding a solution strategy.*
  - *Circulate as students are working on the problem to observe solution strategies being used, then go over together whole class.*
  - *Collect and each day identify a different group of students whose you will check and record progress.*

8 <sup>th</sup> Grade: Common Assessment Blueprints					
Chapter	Common Core	Number of Questions			
		I1	I2	I3	I4
1: Equations	8.EE.7a, 8.EE.7b	18			
2: Transformations	8.G.1a, 8.G.1b, 8.G.1c, 8.G.2, 8.G.3, 8.G.4	12	2		2
Interim 1 Free Response Question: 8.G.1, 8.G.2, 8.G.3, 8.G.4					
3: Angles and Triangles	8.G.5		6		
4: Graphing and Writing Linear Equations	8.EE.5, 8.EE.6, 8.F.4		14	2	2
5: Systems of Linear Equations	8.EE.7a, 8.EE.7b, 8.EE.8a, 8.EE.8b, 8.EE.8c		10	2	2
Interim 2 Free Response Question: 8.EE.5, 8.EE.6, 8.EE.7, 8.EE.8					
6: Functions	8.F.1, 8.F.2, 8.F.3, 8.F.4, 8.F.5			12	2
7: Real Numbers and the Pythagorean Theorem	8.NS.1, 8.NS.2, 8.EE.2, 8.G.6, 8.G.7, 8.G.8			12	2
8: Volume and Similar Solids	8.G.9			4	
Interim 3 Free Response Question: 8.F.1, 8.F.2, 8.F.3, 8.F.4, 8.F.5					
9: Data Analysis and Displays	8.SP.1, 8.SP.2, 8.SP.3, 8.SP.4				10
10: Exponents and Scientific Notation	8.EE.1, 8.EE.3, 8.EE.4				12
Interim 4 Free Response Question: 8.SP.1, 8.SP.2, 8.SP.3, 8.SP.4					
Total		30	32	32	32

**Bold standard** indicates that the, “teaching is complete, standard can be assessed” according to Big Ideas Math. For the non-bold standards, please limit the questions you develop to the degree in which the standard has been taught within that chapter.

Free Response Questions: Questions should include, but are not limited to, the standards listed.

Algebra: Common Assessment Blueprints					
Chapter	Common Core	Number of Questions			
		I1	I2	I3	I4
1: Solving Linear Equations	<a href="#">N.Q.1</a> , <a href="#">N.Q.2</a> , <a href="#">A.CED.1</a> , <a href="#">A.CED.4</a> , <a href="#">A.REI.1</a> , <a href="#">A.REI.3</a>	11			
2: Graphing and Writing Linear Equations	<a href="#">N.Q.1</a> , <a href="#">A.CED.2</a> , <a href="#">A.CED.3</a> , <a href="#">A.REI.10</a> , <a href="#">8.F.3</a> , <a href="#">8.F.4</a> , <a href="#">F.IF.4</a> , <a href="#">F.IF.6</a> , <a href="#">F.IF.7a</a> , <a href="#">F.BF.1a</a> , <a href="#">F.LE.5</a>	9 1			
3: Solving Linear Inequalities	<a href="#">N.Q.2</a> , <a href="#">A.CED.1</a> , <a href="#">A.CED.3</a> , <a href="#">A.REI.3</a> , <a href="#">A.REI.12</a>	8 1			
Interim 1 Free Response Question: <a href="#">A.CED.2</a> , <a href="#">A.CED.3</a> , <a href="#">A.REI.12</a>					
4: Solving Systems of Linear Equations	<a href="#">N.Q.2</a> , <a href="#">A.CED.3</a> , <a href="#">8.EE.8a</a> , <a href="#">8.EE.8b</a> , <a href="#">8.EE.8c</a> , <a href="#">A.REI.5</a> , <a href="#">A.REI.6</a> , <a href="#">A.REI.11</a> , <a href="#">A.REI.12</a>		2 1 4	1	
5: Linear Functions	<a href="#">8.F.1</a> , <a href="#">8.F.2</a> , <a href="#">8.F.3</a> , <a href="#">8.F.4</a> , <a href="#">8.F.5</a> , <a href="#">F.IF.1</a> , <a href="#">F.IF.2</a> , <a href="#">F.IF.3</a> , <a href="#">F.IF.5</a> , <a href="#">F.IF.7b</a> , <a href="#">F.IF.9</a> , <a href="#">F.BF.1a</a> , <a href="#">F.BF.2</a> , <a href="#">F.BF.3</a> , <a href="#">F.LE.1b</a> , <a href="#">F.LE.2</a>		7 3	1	1
6: Exponential Equations and Functions	<a href="#">N.RN.1</a> , <a href="#">N.RN.2</a> , <a href="#">N.RN.3</a> , <a href="#">N.Q.1</a> , <a href="#">N.Q.3</a> , <a href="#">A.SSE.1a</a> , <a href="#">A.SSE.1b*</a> , <a href="#">A.SSE.3c</a> , <a href="#">A.CED.1</a> , <a href="#">A.CED.2</a> , <a href="#">A.REI.3</a> , <a href="#">A.REI.10</a> , <a href="#">A.REI.11</a> , <a href="#">8.F.2</a> , <a href="#">F.IF.3</a> , <a href="#">F.IF.7e</a> , <a href="#">F.IF.8b</a> , <a href="#">F.IF.9</a> , <a href="#">F.BF.1a</a> , <a href="#">F.BF.1b</a> , <a href="#">F.BF.2</a> , <a href="#">F.BF.3</a> , <a href="#">F.LE.1a</a> , <a href="#">F.LE.1c</a> , <a href="#">F.LE.2</a> , <a href="#">F.LE.5</a>		5 7 1	2 1	1 1
Interim 2 Free Response Question: <a href="#">A.REI.3</a> , <a href="#">F.IF.2</a>					
7: Polynomial Equations and Factoring	<a href="#">A.SSE.1a</a> , <a href="#">A.SSE.2</a> , <a href="#">A.SSE.3a</a> , <a href="#">A.APR.1*</a> , <a href="#">A.REI.4b</a>			7 2	2
8: Graphing Quadratic Functions	<a href="#">A.CED.2</a> , <a href="#">A.REI.10</a> , <a href="#">8.F.5</a> , <a href="#">F.IF.4</a> , <a href="#">F.IF.6</a> , <a href="#">F.IF.7a</a> , <a href="#">F.BF.3</a> , <a href="#">F.LE.3</a>			4 1 3	1
9: Solving Quadratic Functions	<a href="#">A.SSE.3b</a> , <a href="#">A.CED.1</a> , <a href="#">A.REI.4a</a> , <a href="#">A.REI.4b</a> , <a href="#">A.REI.7</a> , <a href="#">A.REI.11</a> , <a href="#">F.IF.8a</a>			4 3 1	1
Interim 3 Free Response Question: <a href="#">A.SSE.1a</a> , <a href="#">A.SSE.3a</a> , <a href="#">A.APR.1</a> , <a href="#">F.IF.7a</a> , <a href="#">F.IF.8a</a>					
10: Square Root Functions and Geometry	<a href="#">N.RN.2</a> , <a href="#">N.Q.3</a> , <a href="#">A.CED.2</a> , <a href="#">A.REI.10</a> , <a href="#">F.IF.4</a> , <a href="#">F.IF.7b</a> , <a href="#">8.G.6</a> , <a href="#">8.G.7</a> , <a href="#">8.G.8</a>				6 1 1
11: Rational Equations and Functions	<a href="#">A.SSE.2</a> , <a href="#">A.CED.1</a> , <a href="#">A.CED.2</a> , <a href="#">A.REI.10</a> , <a href="#">F.BF.4a</a>				4 2
12: Data Analysis and Displays	<a href="#">N.Q.3</a> , <a href="#">8.SP.1</a> , <a href="#">8.SP.2</a> , <a href="#">8.SP.3</a> , <a href="#">8.SP.4</a> , <a href="#">S.ID.1</a> , <a href="#">S.ID.2</a> , <a href="#">S.ID.3</a> , <a href="#">S.ID.5</a> , <a href="#">S.ID.6a</a> , <a href="#">S.ID.6b</a> , <a href="#">S.ID.6c</a> , <a href="#">S.ID.7</a> , <a href="#">S.ID.8</a> , <a href="#">S.ID.9</a>				4 3 2
Interim 4 Free Response Question: <a href="#">F.IF.4</a> , <a href="#">S.ID.7</a> , <a href="#">S.ID.8</a> , <a href="#">S.ID.9</a>					

# Algebra I Standards

Standard (3.0)	Standard Scaffolding	Big Ideas Algebra I
8.EE.C.8 -- 8.EE.C.8a -- 8.EE.C.8b -- 8.EE.C.8c	Recognize and recall specific terminology such as: System of Linear Equations; Intersection. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain how a line represents the infinite number of solutions to a linear equation with two variables; use algebraic reasoning (simple substitution) and the properties of real numbers to simplify linear equations.	Chapter 4, Lesson 1, Lesson 2, Lesson 3, Lesson 4
8.F.A.1	Recognize and recall specific terminology such as: Function, Input, Output. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Find the output of a function when specific inputs are provided.	Chapter 5, Lesson 1, Lesson 2
8.F.A.2	Recognize and recall specific terminology such as: Linear Function, Rate of Change. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Determine the properties of a function written in algebraic form, in table format and represented on a graph (e.g., rate of change, meaning of y-intercept, linear, non-linear).	Chapter 5, Lesson 4, Chapter 6, Lesson 5
8.F.A.3	Recognize and recall specific terminology such as: Linear Function. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain that linear functions form a straight line and nonlinear functions do not form a straight line.	Chapter 2, Lesson 5, Chapter 5, Lesson 3, Lesson 5
8.F.B.4	Recognize and recall specific terminology such as: Linear Function, Rate of Change. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Define the y-intercept in relation to the situation.	Chapter 2, Lesson 7, Chapter 5, Lesson 3
8.F.B.5	Recognize and recall specific terminology such as: Increasing, Decreasing, Linear, Nonlinear. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Match the graph of function to a given situation.	Chapter 5, Lesson 5, Chapter 8, Lesson 1, Lesson 3
8.G.B.6	Recognize and recall specific terminology such as: Pythagorean Theorem, Leg, Hypotenuse, Converse. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Use visual models to demonstrate the relationship of the three side lengths of any right triangle.	Chapter 10, Lesson 3, Lesson 4
8.G.B.7	Recognize and recall specific terminology such as: Pythagorean Theorem, Leg, Hypotenuse. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Draw a diagram to set up the equation to solve for the unknown side length of a right triangle.	Chapter 10, Lesson 3, Lesson 4
8.G.B.8	Recognize and recall specific terminology such as: Pythagorean Theorem, Leg, Hypotenuse. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Connect any two points on a coordinate grid to a third point so that the three points form a right triangle.	Chapter 10, Lesson 4
8.SP.A.1	Recognize and recall specific terminology such as: Scatter Plot, Bivariate, Clustering, Outliers, Positive and Negative Association, Linear and Nonlinear Association, Trend Line, Line of Best Fit. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Plot ordered pairs on a coordinate grid representing the relationship between two data sets.	Chapter 12, Lesson 5
8.SP.A.2	Recognize and recall specific terminology such as: Scatter Plot, Linear and Nonlinear Association, Trend Line, Line of Best Fit. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Know that straight lines are widely used to model relationships between two quantitative variables. For scatter plots that suggest a linear association, informally fit a straight line.	Chapter 12, Lesson 5
8.SP.A.3	Recognize and recall specific terminology such as: Bivariate, Linear and Nonlinear Association, Trend Line, Line of Best, Slope, Y-Intercept. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Intercept the y-intercept of the equation in the context of the collected data; interpret the slope of the equation in the context of the collected data.	Chapter 12, Lesson 5
8.SP.A.4	Recognize and recall specific terminology such as: Bivariate, Categorical Data, Two-Way Table, Frequency, Relative Frequency. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Create a two-way table to record the frequencies of bivariate categorical values.	Chapter 12, Lesson 7

Standard (3.0)	Standard Scaffolding	Big Ideas Algebra I
HSN-RN.A.1	Recognize and recall specific terminology such as: Exponent, Rational, Expression, Integer. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify a method for finding the square roots of numbers; apply the properties of exponents to simplify algebraic expressions with rational exponents.	Chapter 6, Lesson 3
HSN-RN.A.2	Recognize and recall specific terminology such as: Exponent, Rational, Expression, Integer, Extraneous Solution. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Apply the properties of exponents to simplify algebraic expressions with rational exponents; apply the properties of exponents to simplify algebraic expressions with integer exponents; Apply the properties of exponents to simplify algebraic expressions with rational exponents.	Chapter 6, Lesson 2, Lesson 3, Chapter 10, Lesson 2
HSN-RN.B.3	Recognize and recall specific terminology such as: Real Number, Rational Number, Irrational Number. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Know how to find the square root of a perfect square; use the order of operations to evaluate expressions; classify real numbers as rational or irrational according to their definitions.	Chapter 6, Lesson 1
HSN-Q.A.1	Recognize and recall specific terminology such as: Scale, Origin. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Label units through multiple steps of a problem; choose appropriate units for real world problems involving formulas; choose an appropriate scale and origin for graphs and data displays.	Found throughout.
HSN-Q.A.2	Recognize and recall specific terminology such as: Descriptive Model. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify or choose the appropriate unit of measure for each variable or quantity.	Found throughout.
HSN-Q.A.3	Recognize and recall specific terminology such as: Accuracy. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Report calculated quantities using the same level of accuracy as used in the problem statement.	Found throughout.
HSA-SSE.A.1 -- HSA-SSE.A.1a -- HSA-SSE.A.1b	Recognize and recall specific terminology such as: Expression, Term, Factor, Coefficient, Equivalent. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Know how to identify the terms and like terms in an algebraic expression; group the parts of an expression differently in order to better interpret their meaning.	Chapter 6, Lesson 5, Lesson 6, Chapter 7, Lesson 1
HSA-SSE.A.2	Recognize and recall specific terminology such as: Equivalent, Polynomials. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Look for and identify clues in the structure of expressions (e.g., like terms, common factors, difference of squares, perfect squares) in order to rewrite it another way; explain why equivalent expressions are equivalent.	Chapter 7, Lesson 9, Chapter 11, Lesson 3, Lesson 4, Lesson 5, Lesson 6
HSA-SSE.B.3 -- HSA-SSE.B.3a -- HSA-SSE.B.3b -- HSA-SSE.B.3c	Recognize and recall specific terminology such as: Quadratic Expression, Complete The Square, Exponential Function, Function. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Predict whether a quadratic will have minimum or maximum based on the value of a; identify and factor perfect-square trinomials; define an exponential function, $f(x) = abx$ .	Chapter 7, Lesson 6, Lesson 7, Lesson 8, Lesson 9, Chapter 9, Lesson 3
HSA-APR.A.1	Recognize and recall specific terminology such as: Polynomial, Integers, Closure Property, Foil Method. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify the like terms in an algebraic expression; use models to add, subtract and multiply polynomials (like terms).	Chapter 7, Lesson 2, Lesson 3, Lesson 4
HSA-CED.A.1	Recognize and recall specific terminology such as: Linear, Quadratic, Rational, Exponential. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify the variables and quantities represented in a real-world problem; determine the best model for the real-world problem (linear equation, linear inequality, quadratic equation, quadratic inequality, rational equation, exponential equation).	Chapter 1, Lesson 1, Lesson 2, Lesson 3, Chapter 3, Lesson 1, Lesson 2, Lesson 3, Lesson 4, Chapter 11, Lesson 7
HSA-CED.A.2	Recognize and recall specific terminology such as: Linear, Quadratic, Coordinate Axes. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify the variables and quantities represented in a real-world problem; determine the best model for the real-world problem (linear equation, linear inequality, quadratic equation, quadratic inequality, rational equation, exponential equation); set up coordinate axes using an appropriate scale and label the axes.	Chapter 2, Lesson 1, Lesson 3, Lesson 4, Lesson 5, Lesson 6, Lesson 7

Standard (3.0)	Standard Scaffolding	Big Ideas Algebra I
HSA-CED.A.3	Recognize and recall specific terminology such as: Linear, Quadratic, Coordinate Axes, Constraints, Solutions. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify the variables and quantities represented in a real-world problem; determine the best model for the real-world problem (linear equation, linear inequality, quadratic equation, quadratic inequality, rational equation, exponential equation); identify the system of equations and/or inequalities that best models the problem.	Chapter 2, Lesson 5, Chapter 3, Lesson 1, Lesson 2, Lesson 3, Lesson 4, Chapter 4, Lesson 1, Lesson 2, Lesson 3, Lesson 4, Lesson 5
HSA-CED.A.4	Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Know the common formulas for area, perimeter, and volume.	Chapter 1, Lesson 4
HSA-REI.A.1	Recognize and recall specific terminology such as: Solutions. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Apply order of operations and inverse operations to solve equations.	Chapter 1, Lesson 1, Lesson 2, Lesson 3
HSA-REI.B.3 -- HSA-REI.B.3a -- HSA-REI.B.3b	Recognize and recall specific terminology such as: Linear Equation, Linear Inequality, Coefficient. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Solve simple linear equations and inequalities for one variable.	Chapter 1, Lesson 1, Lesson 2, Lesson 3, Chapter 3, Lesson 2, Lesson 3, Lesson 4, Chapter 6, Lesson 4
HSA-REI.B.4 -- HSA-REI.B.4a -- HSA-REI.B.4b -- HSA-REI.B.4c	Recognize and recall specific terminology such as: Quadratic Equation, Quadratic Formula, Radicand, Perfect Square Trinomial, Imaginary Number, Factoring Completely. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify a quadratic equation, $ax^2 + bx + c$ ; Identify a perfect-square trinomial by first noticing if $a$ and $c$ are perfect squares and if $b=2ac$ ; Explain that complex solutions result when the radicand is negative in the quadratic formula ( $b^2 - 4ac < 0$ ).	Chapter 7, Lesson 5, Lesson 6, Lesson 7, Lesson 8, Lesson 9, Chapter 9, Lesson 1, Lesson 2, Lesson 3, Lesson 4
HSA-REI.C.5	Recognize and recall specific terminology such as: System of Equations, Equivalent Equations, Elimination Method. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Recall the equivalent equations result when an equation is multiplied by the same number on both sides of the equal sign.	Chapter 4, Lesson 3
HSA-REI.C.6	Recognize and recall specific terminology such as: System of Equations, Elimination Method, Substitution Method, Intersection. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain why some linear systems have no solutions and identify linear systems that have no solution; explain why some linear systems have infinitely many solutions and identify linear systems that have infinitely many solutions.	Chapter 4, Lesson 1, Lesson 2, Lesson 3, Lesson 4
HSA-REI.D.7	Recognize and recall specific terminology such as: System of Equations, Substitution Method, Intersection, Linear Equation, Quadratic Equation. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Distinguish between equations that are linear and those that are quadratic.	Chapter 9, Lesson 5
HSA-REI.D.10	Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Verify that any point on a graph will result in a true equation when their coordinates are substituted into the equation.	Chapter 2, Lesson 1, Lesson 3, Lesson 4, Lesson 6, Chapter 11, Lesson 1, Lesson 2
HSA-REI.D.11	Recognize and recall specific terminology such as: Polynomial Function, Rational Function, Absolute Value Function, Exponential Function, Logarithmic Function. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain that a point of intersection on the graph of a system of equations, $y=f(x)$ and $y=g(x)$ , represents a solution to both equations.	Chapter 6, Lesson 4, Chapter 9, Lesson 1
HSA-REI.D.12	Recognize and recall specific terminology such as: Half-Plane, Boundary. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain that the solution set for a system of linear inequalities is the intersection of the shaded regions (half-planes) of both inequalities; check points in the intersection of the half-planes to verify that they represent a solution to the system.	Chapter 3, Lesson 5, Chapter 4, Lesson 5
HSF-IF.A.1	Recognize and recall specific terminology such as: Domain, Range, Function, Input, Output, Element, Function Notation. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Define a function as a relation in which each input (domain) has exactly output (range); Explain that when $x$ is an element of the input of a function, $f(x)$ represents the corresponding output of the function; Explain that function notation is not limited to $f(x)$ ; other letters (e.g., $g(x)$ and $p(x)$ ) can also be used so we can tell different function apart.	Chapter 5, Lesson 1, Lesson 2, Lesson 4

Standard (3.0)	Standard Scaffolding	Big Ideas Algebra I
HSF-IF.A.2	Recognize and recall specific terminology such as: Domain, Function, Input, Output, Function Notation. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Use order of operations to evaluate a function for a given domain (input) value; Convert a table, graph, set of ordered pairs, or description into function notation by identifying the rule used to turn inputs into outputs and writing the rule.	Chapter 5, Lesson 4
HSF-IF.A.3	Recognize and recall specific terminology such as: Domain, Range, Function, Sequence, Explicit Formula, Recursive Formula. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Convert a list of number (a sequence) into a function by making the whole numbers (0,1,2,etc.) the inputs and the elements of the sequence the outputs.	Chapter 5, Lesson 6, Chapter 6, Lesson 7
HSF-IF.B.4	Recognize and recall specific terminology such as: Interval, Maximum, Minimum, End Behavior, Periodicity. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Locate the information that explains what each quantity represents; identify the y-intercept; locate the information that explain what each quantity represents.	Chapter 2, Lesson 2, Lesson 3, Lesson 4, Lesson 6, Lesson 7, Chapter 8, Lesson 2, Lesson 4, Lesson 5, Chapter 10, Lesson 1
HSF-IF.B.5	Recognize and recall specific terminology such as: Function, Domain. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain how the domain of the function is represented in its graph.	Chapter 5, Lesson 1, Lesson 2
HSF-IF.B.6	Recognize and recall specific terminology such as: Interval, Function, Rate of Change. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain the connection between average rate of change and the slope formula: $\Delta y / \Delta x$ .	Chapter 2, Lesson 2, Lesson 6, Chapter 8, Lesson 5
HSF-IF.C.7 -- HSF-IF.C.7a -- HSF-IF.C.7b -- HSF-IF.C.7e	Recognize and recall specific terminology such as: End Behavior, Logarithmic Function. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify the x-intercept(s), y-intercept, increasing intervals, decreasing intervals, the maximums, and minimums of a function by looking at its graph; Identify that the parent function for lines is the line $f(x) = x$ ; Identify the slope-intercept form of a linear function as $F(x) = mx + b$ ; Explain that the parent function for quadratic functions is the parabola $f(x)=x^2$ ; Find the y-intercept of a quadratic by substituting 0 for x and evaluating; Explain that the parent function for square root functions is the function $f(x) = \text{square root of } x$ ; Define piecewise functions as functions that have different rules for evaluation depending on the value of the input; Explain that the parent function for exponentials is $f(x)=bx$ where b is a positive number.	Chapter 5, Lesson 4, Chapter 6, Lesson 4, Lesson 5, Lesson 6, Chapter 8, Lesson 4, Lesson 5, Chapter 10, Lesson 1
HSF-IF.C.8 -- HSF-IF.C.8a -- HSF-IF.C.8b	Recognize and recall specific terminology such as: Exponential Growth and Decay, Algebraically, Graphically, Numerically. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain that standard form for a quadratic function is $f(x)=ax^2 +bx + c$ ; Explain that factored form is $f(x)=a(x-x_1)(x-x_2)$ where $x_1$ and $x_2$ are x-intercepts of the function; Distinguish between exponential functions that model exponential growth and exponential decay.	Chapter 9, Lesson 3
HSF-IF.C.9	Perform basic processes and recognize and recall the accuracy of basic solutions and information such as:	Chapter 5, Lesson 4, Chapter 6, Lesson 5
HSF-BF.A.1 -- HSF-BF.A.1a -- HSF-BF.A.1b	Recognize and recall specific terminology such as: Parent Function, Composition of Functions, Transformation. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Define explicit and recursive expressions of a function; identify the quantities being compared in real-world problems.	Chapter 5, Lesson 3
HSF-BF.A.2	Recognize and recall specific terminology such as: Arithmetic Sequence, Geometric Sequence, Recursive Formula, Explicit Formula. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain that recursive formula tells me how a sequence starts and tells me how to use the previous value(s) to generate the next element of the sequence; Explain that an explicit formula allows me to find any element of a sequence without knowing the element before it. (e.g., if I want to know the 11th number on the list, I plug the number 11 into the explicit formula); Define an arithmetic sequence as a sequence of numbers that is formed so that the difference between consecutive terms is always the same known as a common difference; Define a geometric sequence as a sequence of numbers that is formed so that the ratio of consecutive terms is always the same known as a common ratio.	Chapter 5, Lesson 6, Chapter 6, Lesson 7

Standard (3.0)	Standard Scaffolding	Big Ideas Algebra I
HSF-BF.B.3	Recognize and recall specific terminology such as: Function, Even and Odd Formulas, Inverse. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Describe the transformation that changed a graph of $f(x)$ into a different graph when given pictures of the pre-image and image.	Chapter 5, Lesson 4, Chapter 6, Lesson 4, Chapter 8, Lesson 1, Lesson 3, Lesson 4
HSF-BF.B.4 -- HSF-BF.B.4a	Recognize and recall specific terminology such as: Function, Inverse. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Define the inverse of a function; Explain that after solving $f(x)=c$ for $x$ , $c$ can be considered the input and $x$ can be considered the output. .	Chapter 11, Lesson 2
HSF-LE.A.1 -- HSF-LE.A.1a -- HSF-LE.A.1b -- HSF-LE.A.1c	Recognize and recall specific terminology such as: Linear Function, Exponential Function, Rate of Change, Slope, Common Ratio. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Define linear function ( $y=mx + b$ ) and exponential function ( $y=abx$ ); Determine if a function has a constant rate of change or a constant multiplier over equal intervals.	Chapter 5, Lesson 5, Chapter 6, Lesson 4
HSF-LE.A.2	Recognize and recall specific terminology such as: Arithmetic Sequence, Geometric Sequence Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Construct linear functions given a graph, description of a relationship, or two-input-output pairs.	Chapter 5, Lesson 3, Lesson 6, Chapter 6, Lesson 4, Lesson 7
HSF-LE.A.3	Recognize and recall specific terminology such as: Polynomial Function Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Observe that exponentially increasing functions eventually exceed linear functions.	Chapter 8, Lesson 5
HSF-LE.B.5	Recognize and recall specific terminology such as: Linear Function, Exponential Function Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Interpret the parameters in a linear function in terms of context.	Chapter 2, Lesson 3, Chapter 6, Lesson 4
HSS-ID.A.1	Recognize and recall specific terminology such as: Dot Plot, Histogram, Box Plot Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Represent data with dot plots.	Chapter 12, Lesson 1, Lesson 3, Lesson 4, Lesson 8
HSS-ID.A.2	Recognize and recall specific terminology such as: Interquartile Range, Standard Deviation Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Use statistics to compare center and spread of two data sets.	Chapter 12, Lesson 1, Lesson 2, Lesson 3, Lesson 4
HSS-ID.A.3	Recognize and recall specific terminology such as: Outliers Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Interpret differences in shape, center, or spread in the context of data sets.	Chapter 12, Lesson 1, Lesson 2, Lesson 3, Lesson 4
HSS-ID.B.5	Recognize and recall specific terminology such as: Two-Way Tables Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Summarize categorical data for two categories in two-way frequency tables.	Chapter 12, Lesson 7
HSS-ID.B.6 -- HSS-ID.B.6a -- HSS-ID.B.6b -- HSS-ID.B.6c	Recognize and recall specific terminology such as: Scatter Plot, Linear Association Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Represent data on two quantitative variables on a scatter plot.	Chapter 12, Lesson 5, Lesson 6
HSS-ID.C.7	Recognize and recall specific terminology such as: Slope, Intercept Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Interpret slope or intercept in a linear model.	Chapter 12, Lesson 5
HSS-ID.C.8	Recognize and recall specific terminology such as: Correlation Coefficient Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: compute the correlation coefficient of a linear fit using technology.	Chapter 12, Lesson 6
HSS-ID.C.9	Recognize and recall specific terminology such as: Correlation, Causation. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Recognize that correlation does not imply causation is not illustrated on a scatter plot. Describe correlation or causation.	Chapter 12, Lesson 6

# Sample ELA Lesson Plans

Time Stamps		Day 1 – Skill Lesson/Main Selection
Unit/Week		Unit 1 – Week 1– “Sam, Come Back!”
Standard		RL.1.3
Skill Focus		Draw conclusions about character traits
I Can Statement		I can draw conclusions about the traits of characters in a story.
Before Reading		
	Phonics & Fluency Quick Drill	
1 minute	Introduce Text	<b>Say:</b> Today, we’re going to read a realistic fiction story called, “Sam, Come Back!” written by Susan Stevens Crummel and illustrated by Janet Stevens. This story is a realistic fiction story. It is a pretend story, but the things that happen could happen in real life.
7 minutes	Skill Focus Introduction & Check for Understanding	<p><b>[Build an anchor chart]</b></p> <p><b>Say: (What)</b> As we read this story today, we’re going to draw conclusions about character traits. Character traits are what a character is like.</p> <p><b>Say: (How)</b> To draw conclusions about a character’s traits we:</p> <ol style="list-style-type: none"> <li>1. Look for clues in the pictures and the text about what the character is saying and doing.</li> <li>2. Ask ourselves, “What does that tell us about what they are like?”</li> </ol> <p><b>Say: (Why)</b> Good readers draw conclusions about character traits to help them learn more about the characters.</p> <p><b>Check for understanding:</b></p> <ul style="list-style-type: none"> <li>• What skill are we focusing on? (<i>Character traits</i>)</li> <li>• How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, “What does this tell us about what they are like?”</i>)</li> <li>• Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)</li> </ul>
3 minutes	Teacher Modeling & Check for Understanding - General example - Previous text	<p><b>Say:</b> There are different kinds of character traits. Some examples are (build a character trait wall and post the traits as you introduce them all week):</p> <ul style="list-style-type: none"> <li>• Caring: Someone who does nice things for other people is caring.</li> <li>• Smart: Someone who knows a lot of information is smart.</li> <li>• Brave: Someone who does not get scared, is brave.</li> <li>• Mischievous: Someone who gets into lots of trouble</li> </ul> <p><i>**See character trait cards attached to the lesson plan</i></p> <p><b>Teacher Model:</b></p> <p><b>Say:</b> The main selection read last week was called, “Farmer’s Market.” (<i>Student edition page 148</i>) The main characters in the story were Pam and Dad. On page 154 of the story Dad got a big bag and zipped all of the things they bought. Thinking about how dad is acting I can draw the conclusion that Pam’s dad is helpful.</p>

		<p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>• What skill did I just use as a good reader? (<i>You drew a conclusion about a character's traits.</i>)</li> <li>• How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>)</li> <li>• Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)</li> </ul>
5 minutes	Explicit Selection Vocabulary Instruction (when appropriate)	<p><b>Words to teach:</b>  <u>Sam</u>: the name of the cat in the story  <u>Jack</u>: the name of the boy in the story</p> <p><b>Say:</b> In our story today, we have some words that you may never have heard before. Let's learn them together to help us understand the story.</p> <p>The first word is <b>Jack</b>. Say it. (Students chorally say the word).  Jack is the name of the boy in the story.</p> <p>The next word is <b>Sam</b>. Say it. (Students chorally say the word).  Sam is the name of the cat in the story.</p> <p>Sam and Jack are playing together with a ball of yarn.  Have the students turn to a partner and use Sam and Jack in a sentence.</p>
<b>During Reading</b>		
5 minutes	Think Aloud & Check for Understanding	<p><b>Say:</b> Now we are going to read, "Sam, Come Back!" I'm going to be looking for readers who follow along and track as I read. Remember as we read we are thinking about the traits of the characters in the story.</p> <p><b>[Stop at page 22]</b>  <b>Say:</b> Remember, Sam is the name of the cat in the story.</p> <p><b>Say:</b> I want to stop here and spend some time thinking about character traits. On page 22 I see that Sam the cat is sitting on the woman's lap and they both are smiling. I can draw the conclusion that Sam the cat is friendly because he is sitting on the woman's lap happily.</p> <p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>• What skill did I just use as a good reader? (<i>You drew a conclusion about a character's traits.</i>)</li> <li>• How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>)</li> <li>• Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)</li> </ul>
10 minutes	Guided Skill-Aligned Comprehension Questions	<p><b>[Stop reading after page 25]</b>  <b>How would you describe Sam now?</b> (<i>Sample response: I would describe Sam as fast. He is able to run away from the boy and the dog and not be caught.</i>)</p>

		<p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• Why is Sam running away? (<i>Sam is running away because he took the woman's yarn.</i>)</li> <li>• Do you have a pet at home? How would you describe them? [TPS-- 10 sec each]</li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• Character traits describe what a character is like. <ul style="list-style-type: none"> <li>○ Have students repeat that statement</li> </ul> </li> </ul> <p><b>[Stop reading after page 28]</b>  <b>Say: How does the woman describe Sam on page 28?</b> (<i>The woman calls Sam bad.</i>)</p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• Why did the woman call Sam a bad cat? (<i>Sam took her yarn and ran away and hid.</i>)</li> <li>• How would you feel if your cat hid from you? [TPS-- 10 sec each]</li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• Character traits describe what a character is like. <ul style="list-style-type: none"> <li>○ Have students repeat that statement</li> </ul> </li> </ul> <p><b>[Stop reading after the word Jack on page 29]</b>  <b>Say: Remember, Jack is the name of the boy in the story.</b></p> <p><b>[Finish reading the text]</b></p>
2 minutes	Spiral Review Questions	<p><b>Setting</b>  <b>[Stop after page 23]</b>  [Setting] What is the setting of the story? (<i>The setting is inside a house.</i>)</p> <p><b>[Stop after page 24]</b>  [Setting] How has the setting changed in the story? (<i>The setting in the beginning of the story was inside a house. Now the setting is outside.</i>)</p>
<b>After Reading</b>		
6 minutes	Independent Practice	<p><b>Say:</b> Now you are going to practice drawing conclusions about character traits on your own. (provide pencil and paper) You will write your constructed response on this piece of paper. [provide response time and circulate to provide feedback]</p> <ul style="list-style-type: none"> <li>• Look back at the pictures in the story "Sam Come Back." How would you describe the dog based on these pictures?  (<i>The dog in the story is very helpful. He helps look for Sam when he ran away and doesn't stop looking until he comes back.</i>)</li> </ul>

1 minute	Closing	<p><b>Say:</b> You did a fantastic job practicing our skill for the day! We will continue working on this tomorrow with a new story and new characters.</p> <p><b>Check for understanding:</b></p> <ul style="list-style-type: none"> <li>• What skill did we focus on today? (<i>Character traits</i>)</li> <li>• How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>)</li> <li>• Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)</li> </ul>
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## 1-2 Constructed Response Writing

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**Directions:** Use text evidence to answer the questions below.**Prompt:** Look back at the pictures in the story "Sam Come Back." How would you describe the dog based on these pictures?**Restate & Answer**

Restate and answer the question in one sentence

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**Cite**

Give an example from the text

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**Sentence starters:**

- Page \_\_\_ says, "\_\_\_."
- The author wrote, "\_\_\_."
- An example in the text is, "\_\_\_."

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**Explain**

Explain how your example supports your answer

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**Sentence starters:**

- This means \_\_\_.
- This shows that \_\_\_.

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Time Stamps		Day 2 – On Level Reader
Unit/Week	Unit 1 – Week 1– Day 2	
Standard	RL.1.3	
Skill Focus	Draw conclusions about character traits	
I Can Statement	I can draw conclusions about the traits of characters in a story.	
Before Reading		
	Phonics & Fluency Quick Drill	
1 minute	Introduce Text	<p><b>Say:</b> Today, we’re going to read a new story called, “Mack and Zack” by Ann Rossi and illustrated by Chi Chung. This story is a realistic fiction story. It is a pretend story, but the things that happen could happen in real life.</p> <p>Read the title with me. (students chorally read title)</p>
4 minutes	Skill Focus Check for Understanding	<p><b>Say:</b> As we read, we are going to practice the same skills from yesterday.</p> <p><b>Revisit previous day’s skills [revisit anchor chart]:</b></p> <ul style="list-style-type: none"> <li>• What skill did we focus on yesterday? (<i>Character traits</i>)</li> <li>• How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, “What does this tell us about what they are like?”</i>)</li> <li>• Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)</li> </ul>
During Reading		
	First Read	<p><b>Say:</b> First, we will read the text silky-smooth by keeping a steady pace and briefly pausing at commas and punctuation. Be sure to pay attention to what is happening in the story as well.</p> <p><b>Say:</b> I will start reading while you follow along. When I say, ‘together,’ we will chorally read as one super-strong voice.</p> <p>Teacher reads pages 1-2. Students join chorally for pages 3-4. Teacher reads pages 5-6. Students join chorally for pages 7-8.</p>
5 minutes	Think Aloud and Check for Understanding	<p><b>Say:</b> Now we have read the whole story I want to spend some time thinking about the character traits I noticed while reading.</p> <p><b>Say:</b> Turn back to page 3. Looking at the illustration I can see the boy and the cat are in the living room. I know that I can draw conclusions about a character’s traits because of what they are doing and saying in the story. In this picture Mack and Zack are hugging each other. Based on this I can draw the conclusion that Mack and Zack are friendly.</p> <p><b>Check for understanding after think aloud:</b></p> <ul style="list-style-type: none"> <li>• What skill did I just use as a good reader? (<i>You drew a conclusion about a character’s traits.</i>)</li> <li>• How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, “What does this tell us about what they are like?”</i>)</li> </ul>

		Why do good readers draw conclusions about character traits? ( <i>Good readers draw conclusions about character traits to help them learn more about the characters.</i> )
13 minutes	Guided Skill-Aligned Comprehension Questions	<p><b>Say:</b> Now, you are going to independently read the story again.</p> <p>(students sticky note stopping locations on pages 3, 5, and 6)</p> <p><b>[Stop reading after page 5]</b>  <b>How would you describe Mack based on his actions on pages 4 and 5?</b> (<i>I would describe Mack as hungry and tired.</i>)</p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• Where does Mack sleep? (<i>Mack sleeps on a mat.</i>)</li> <li>• Where do you think Zack is while Mack is napping? [TPS-- 10 sec each]</li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• Mack is hungry and tired. <ul style="list-style-type: none"> <li>○ Have students repeat that statement</li> </ul> </li> </ul> <p><b>[Stop reading after page 6]</b>  <b>How do you think Mack and Zack feel about each other? How do you know?</b> (<i>I think that Mack and Zack like each other. I know this because they spend time together and Zack wants Mack to come to him. The illustration shows Mack and Zack smiling at each other.</i>)</p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• What are the characters doing on page 6? (<i>Zack is sitting in the chair looking at Mack. Mack is coming over to Zack.</i>)</li> <li>• Do you have a pet? How do you feel about them? [TPS-- 10 sec each]</li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• Mack and Zack care for each other. <ul style="list-style-type: none"> <li>○ Have students repeat that statement</li> </ul> </li> </ul> <p><b>[Finish reading the text]</b></p>
5 minutes	Spiral Review Questions	<p><b>Setting</b>  <b>[Stop after page 3]</b></p> <ul style="list-style-type: none"> <li>• [Setting] What is the setting in this story? How do you know? (<i>The setting is in a living room inside a house. I know this because I see a couch and coffee table.</i>)</li> </ul>
<b>After Reading</b>		
10 minutes	Independent Practice	<p><b>Say:</b> Now you are going to practice drawing conclusions about character traits on your own. (provide pencil and paper) You will write your constructed response on this piece of paper. [provide response time and circulate to provide feedback]</p> <p>What are two words you would use to describe Mack based on what you read in "Zack and Mack?" Why would you describe him this way? (<i>Answers will vary.</i>)</p>

		<i>Response could include: Mack is friendly because he likes to be held by Zack. He is also a good listener because he always comes when Zack calls him.)</i>
2 minutes	Closing	<p><b>Say:</b> Wow! You did awesome practicing our skill again! We will continue working on this tomorrow with a new text.</p> <p><b>Check for understanding:</b></p> <ul style="list-style-type: none"> <li>• What skill did we focus on today? (<i>Character traits</i>)</li> <li>• How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>)</li> <li>• Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)</li> </ul>



Time Stamps		Day 3 – Below Level Reader	
Unit/Week		Unit 1 – Week 1– Day 3	
Standard		RL.1.3	
Skill Focus		Draw conclusions about character traits	
I Can Statement		I can draw conclusions about the traits of characters in a story.	
Before Reading			
	Phonics & Fluency Quick Drill		
1 minute	Introduce Text	<p><b>Say:</b> I'm excited that today we are going to be reading a new story today! This story is called "Sam" by Alan Levine and illustrated by Phyllis Pollema-Cahill. This story is a realistic fiction story. It is a pretend story, but the things that happen could happen in real life.</p> <p>Read the title with me. (students chorally read title)</p>	
4 minutes	Skill Focus Check for Understanding	<p><b>Say:</b> As we read, we are going to practice the same skill from yesterday.</p> <p><b>Revisit previous day's skills [revisit anchor chart]:</b></p> <ul style="list-style-type: none"> <li>• What skill did we focus on yesterday? (<i>We drew conclusions about a character's traits.</i>)</li> <li>• How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>)</li> <li>• Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)</li> </ul>	
During Reading			
7 minutes	First Read	<p><b>Say:</b> First, we will read the text silky-smooth by keeping a steady pace and briefly pausing at commas and punctuation. Be sure to pay attention to what is happening in the story as well.</p> <p><b>Say:</b> I will start reading while you follow along. When I say, 'together,' we will chorally read as one super-strong voice.</p> <p>Teacher reads pages 3-6. Students join chorally for pages 3-4. Teacher reads pages 5-6. Students join chorally for pages 7-8.</p>	
3 minutes	Think Aloud and Check for Understanding	<p><b>Say:</b> After reading the entire text I want to think about the characters and how I would describe them based on what they do and say. Let's turn back to page 4. On this page Sam came to Jack. Based on this page I can draw the conclusion that Sam is a friendly duck because he came to the boy and wasn't afraid like most ducks would be.</p> <p><b>Check for understanding after think aloud:</b></p> <ul style="list-style-type: none"> <li>• What skill did I just use as a good reader? (<i>You drew a conclusion about a character's traits.</i>)</li> <li>• How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>)</li> <li>• Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)</li> </ul>	

10 minutes	Second Read Guided Skill-Aligned Comprehension Questions	<p><b>Say:</b> Now, you are going to independently read the story again. As you read think about how you would describe the characters in the story.</p> <p>(students sticky note stopping locations on pages 5 and 6 prior to reading)</p> <p><b>[Stop reading after page 5]</b>  <b>Say: How would you describe Sam based on his actions on page 5?</b>  (Sample response: <i>Sam is a curious because he walks in to the bathroom from outside.</i>)</p> <p><b><u>Scaffolded Questions:</u></b></p> <ul style="list-style-type: none"> <li>• What are the characters doing on page 4? (<i>Sam and Jack are outside. Jack is coming to Sam.</i>)</li> <li>• Do you think Sam understands Jack when he tells him to come? [TPS – 10 sec each]</li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• Sam is a curious duck. <ul style="list-style-type: none"> <li>○ Have students repeat that statement</li> </ul> </li> </ul> <p><b>[Finish reading after page 6]</b>  <b>How would you describe Sam based on his actions on page 6?</b> (Sample response: <i>Sam is a brave because he swims in the bath tub.</i>)</p> <p><b><u>Scaffolded Questions:</u></b></p> <ul style="list-style-type: none"> <li>• What is in the tub with Sam? (<i>There is a toy boat and a rubber duck in the tub with Sam.</i>)</li> <li>• Would you like a duck for a pet? [TPS- 10 sec each]</li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• Sam is a brave duck. Have students repeat that statement</li> </ul> <p><b>[Finish reading the text]</b></p>
3 minutes	Spiral Review Questions	<p><b>Setting</b>  <b>[Stop after page 5]</b></p> <ul style="list-style-type: none"> <li>• [Setting] What are the settings of the story on pages 4 and 5? (<i>The setting on page 4 is outside. The setting on page 5 is inside of a bathroom.</i>)</li> </ul>
<b>After Reading</b>		
10 minutes	Independent Practice	<p><b>Say:</b> Now you are going to practice drawing conclusions about character traits on your own. (provide pencil and paper) You will write your constructed response on this piece of paper. [provide response time and circulate to provide feedback]</p> <p>Look back at the pictures in the story “Sam.” How would you describe Jack based on his actions?  <i>Answers will vary. Sample response: Sam is helpful. He helps Sam to the tub and gives him a bath. He also helps Sam get a snack</i></p>
2 minutes	Closing	<p><b>Say:</b> Wow! You did awesome practicing our skill again! We will continue working on this tomorrow with a new story and new characters.</p>

		<p><b>Check for understanding:</b></p> <ul style="list-style-type: none"><li>• What skill did we focus on today? (<i>We drew a conclusion about a character's traits.</i>)</li><li>• How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>)</li><li>• Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)</li></ul>
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SAMPLE

# 1-2 Constructed Response Writing

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**Directions:** Use text evidence to answer the questions below.

**Prompt:** Look back at the pictures in the story "Sam." How would you describe Jack based on his actions?

## Restate & Answer

Restate and answer the question in one sentence

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## Cite

Give an example from the text

**Sentence starters:**

- Page \_\_ says, "\_\_\_."
- The author wrote, "\_\_\_."
- An example in the text is, "\_\_\_."

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## Explain

Explain how your example supports your answer

**Sentence starters:**

- This means \_\_\_.
- This shows that \_\_\_.

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Time Stamps		Day 4– Sleuth
Unit/Week	Unit 1 – Week 1– Day 4	
Standard	RL.1.3	
Skill Focus	Draw conclusions about character traits	
I Can Statement	I can draw conclusions about the traits of characters in a story.	
Before Reading		
	Phonics & Fluency Quick Drill	
1 minute	Introduce Text	<p><b>Say:</b> Today, we're going to read a realistic fiction story titled, "Are You My Kitten?"</p> <p>Read the title with me. (students chorally read title)</p>
4 minutes	Skill Focus Check for Understanding	<p><b>Say:</b> As we read, we are going to practice the same skill(s) from yesterday.</p> <p><b>Revisit previous day's skills [revisit anchor chart]:</b></p> <ul style="list-style-type: none"> <li>• What skill did we focus on yesterday? (<i>Character traits</i>)</li> <li>• How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>)</li> <li>• Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)</li> </ul>
During Reading		
4 minutes	First Read	<p><b>Say:</b> First, I will read the text while you follow along.</p> <p>Teacher reads the text.</p>
4 minutes	Second Read	<p><b>Say:</b> Next, read it again independently. As you read think about how you would describe the characters.</p>
15 minutes	Skill Aligned Question and Discussion	<p><b>Say: Who are the characters in this story?</b> (<i>Kelly and three kittens.</i>)</p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• Why is Kelly with three kittens? (<i>She is trying to decide which kitten should be her pet.</i>)</li> <li>• Would you like to have a pet kitten? [TPS – 10 sec each]</li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• Kelly and three kittens are the characters in this story. <ul style="list-style-type: none"> <li>○ Have students repeat that statement</li> </ul> </li> </ul> <p><b>Say: How would you describe Kelly based on her actions in the story?</b> (<i>Sample response: Kelly is very careful. She took her time to figure out which kitten would be best for her.</i>)</p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• Why did Kelly pick the third kitten? (<i>The kitten touched her hand with its paw.</i>)</li> </ul>

		<ul style="list-style-type: none"> <li>• What does Kelly want to do with her kitten at home? (<i>Kelly wants to feed her kitten and get him water. She wants to give him a place to sleep and play with him.</i>)</li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• Kelly is a careful person. <ul style="list-style-type: none"> <li>○ Have students repeat that statement</li> </ul> </li> </ul>
<b>After Reading</b>		
10 minutes	Independent Practice or additional Sleuth	<p><b>Say:</b> Now you are going to practice drawing conclusions about character traits on your own. (provide pencil and paper) You will write your constructed response on this piece of paper. [provide response time and circulate to provide feedback</p> <ul style="list-style-type: none"> <li>• How would you describe the kitten that Kelly chose to be her pet in the story? (<i>Sample response: The kitten that Kelly chose is a nice kitten. It is nice because it touched her hand with a soft paw.</i>)</li> </ul>
2 minutes	Closing	<p><b>Say:</b> You just practiced your skill with a difficult text. You did a lot of deep thinking! Kiss your brains!</p> <p><b>Check for understanding:</b></p> <ul style="list-style-type: none"> <li>• What skill did we focus on today? (<i>We drew a conclusion about a character's traits.</i>)</li> <li>• How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>)</li> <li>• Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)</li> </ul>

# 1-2 Constructed Response Writing

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**Directions:** Use text evidence to answer the questions below.

**Prompt:** How would you describe the kitten that Kelly chose to be her pet in the story?

## Restate & Answer

Restate and answer the question in one sentence

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## Cite

Give an example from the text

**Sentence starters:**

- Page \_\_\_ says, "\_\_\_."
- The author wrote, "\_\_\_."
- An example in the text is, "\_\_\_."

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## Explain

Explain how your example supports your answer

**Sentence starters:**

- This means \_\_\_.
- This shows that \_\_\_.

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# caring



concerned for others

# competitive



having a strong  
desire to win

# lonely



always feeling alone  
and without friends

# loving



showing warm  
affection

# brave



not afraid of anything

# mean



not nice to others

# courteous



considering other's feelings before doing or saying something

# nervous



uneasy or scared

# funny



being good at making others laugh

# responsible



being dependable by doing the right things

# grateful



appreciating the wonderful things in life

# timid



shy

# creative



uses imagination to  
create new and unique  
ideas

# impatient



doesn't stay calm when  
things don't go his/her way

# bossy



likes to tell others what  
to do

# jealous



wants what others have

# lazy



doesn't want to put energy into anything

# thoughtful



showing consideration for others

# mischievous



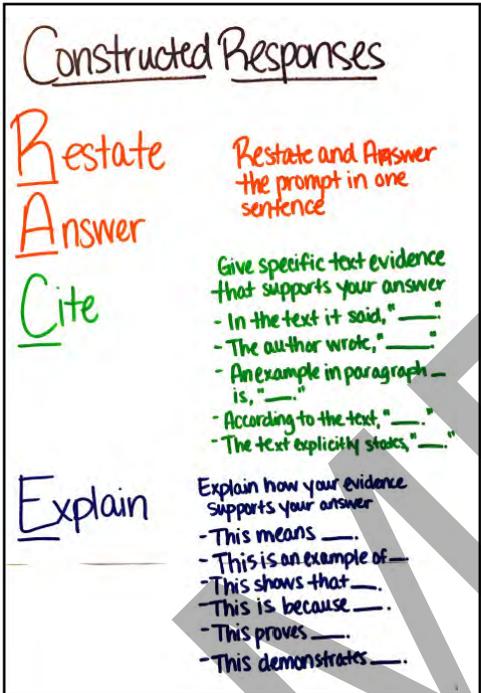
causes a lot of trouble

# honest



always tells the truth

**Constructed Responses** are written responses to Reading Literature & Reading Informational text. Students will read text and respond to a prompt. Constructed responses are valuable and should be a regular practice because they support student comprehension and critical thinking about text.

Pacing Guide	Best Practice	
Between weeks 1-2 of school	<p>Build an anchor chart with your class that reflects the process they will take to complete a constructed response. Daily constructed responses will aid in their ability to successfully complete them.</p>  <p>The anchor chart is titled "Constructed Responses" and lists four steps: Restate, Answer, Cite, and Explain. Each step includes a brief description and several sentence starters.</p> <ul style="list-style-type: none"> <li><b>Restate:</b> Restate and Answer the prompt in one sentence.</li> <li><b>Answer:</b> Give specific text evidence that supports your answer. <ul style="list-style-type: none"> <li>- In the text it said, "___"</li> <li>- The author wrote, "___"</li> <li>- An example in paragraph ___ is, "___"</li> <li>- According to the text, "___"</li> <li>- The text explicitly states, "___"</li> </ul> </li> <li><b>Cite:</b> (No specific instructions listed in the image)</li> <li><b>Explain:</b> Explain how your evidence supports your answer. <ul style="list-style-type: none"> <li>- This means ___</li> <li>- This is an example of ___</li> <li>- This shows that ___</li> <li>- This is because ___</li> <li>- This proves ___</li> <li>- This demonstrates ___</li> </ul> </li> </ul>	<p>Tips:</p> <ul style="list-style-type: none"> <li>• Make the anchor chart with the class</li> <li>• Complete one letter of RACE on anchor chart each day <i>**Only add/practice RA until students are ready to begin CE</i></li> <li>• Add sentence starters to the anchor chart</li> </ul>
Between weeks 2-4	<p><b>Model</b> Teacher models writing constructed responses using the RACE method with each day's prompt. The model assists students in understanding the expectations for CR writing.</p>	<p>Tips:</p> <ul style="list-style-type: none"> <li>• Teacher thinks aloud while modeling</li> <li>• Teacher writes response using RACE anchor chart &amp; CR handout</li> <li>• Students copy response on CR handout</li> <li>• Students score one CR based on 2-point rubric <i>** Start with RA until students are ready to add CE</i></li> </ul>
Between weeks 4-7	<p><b>Shared Writing</b> Teacher facilitates a shared write of constructed responses using the RACE method with each day's prompt. Shared writing allows the teacher to guide student writing to meet expectations.</p>	<p>Tips:</p> <ul style="list-style-type: none"> <li>• Teacher guides students through RACE method</li> <li>• Teacher references RACE anchor chart for sentence starters</li> <li>• Teacher writes response on CR template for students to copy (everyone has same response)</li> <li>• Students score one CR based on 2-point rubric <i>** Start with RA until students are ready to add CE</i></li> </ul>
Between weeks 7-10	<p><b>Independent Writing</b> Students independently write constructed responses.</p>	<p>Tips:</p> <ul style="list-style-type: none"> <li>• Teacher reads CR prompt to class</li> <li>• Teacher reminds students of expectations</li> <li>• Students write on CR handout</li> <li>• Students write using RACE method</li> <li>• Students score one CR based on 2-point rubric</li> <li>• Teacher circulates to provide feedback <i>** Start with RA until students are ready to add CE</i></li> </ul>

**Scoring:**

<b>Constructed Response Rubric</b>	
<b>Score</b>	<b>Response Features</b>
2 Points	<ul style="list-style-type: none"> <li>• Accurate inferences and/or claims which include evidence or details from the text where required by the prompt</li> <li>• Relevant facts, concrete details, and/or other information from the text to develop a response according to the requirements of the prompt</li> <li>• Sufficient number of facts, concrete details, and/or other information from the text as required by the prompt</li> <li>• Grammatical errors do not impact readability</li> </ul>
1 Point	<ul style="list-style-type: none"> <li>• The response includes accurate inferences and/or claims but is not clearly text-based where required by the prompt.</li> <li>• Includes limited relevant facts, concrete details, and/or other information from the text to develop a response according to the requirements of the prompt</li> <li>• Grammatical errors may impact readability at times</li> </ul>
0 Point	<ul style="list-style-type: none"> <li>• A response that does not address any of the requirements of the prompt or is incomplete or totally inaccurate</li> <li>• A response that is completely unintelligible or indecipherable</li> </ul>

Time Stamps		Day 1 – Skill Lesson/Main Selection, Part 1
Unit/Week	Unit 1 – Week 2 – Day 1 – “Lewis and Clark and Me”	
Standard	RI.4.1	
Skill Focus	Author’s Purpose	
I Can Statement	I can determine author’s purpose by identifying the information in the text and making inferences about it to find out the reasons it was written.	
Before Reading		
1 minute	Introduce Text	<p><b>Say:</b> Today, we’re going to read a historical fiction text titled, “Lewis and Clark and Me” by Laurie Myers. Historical fiction includes some real people and real events, but the information is told in a story format.</p> <p>Read the title with me. (Students chorally read title.)</p>
7 minutes	Skill Focus Introduction & Check for Understanding	<p><b>[Build an anchor chart]</b></p> <p><b>Say: (What)</b> This week we are going to determine the author’s purpose for writing a text. The author’s purpose is the reason or reasons an author has for writing.</p> <p><b>Say: (How)</b> To determine author’s purpose we:</p> <ul style="list-style-type: none"> <li>● Identify what kind of information like facts, steps, feelings, and sensory details is shared in the text.</li> <li>● Determine if that information is meant to: <ul style="list-style-type: none"> <li>○ Persuade</li> <li>○ Inform</li> <li>○ Explain</li> <li>○ Entertain</li> <li>○ Express ideas or feelings</li> </ul> </li> </ul> <p><b>Say: (Why)</b> Determining author’s purpose helps you know why the text was written.</p> <p><b>Check for understanding:</b></p> <ul style="list-style-type: none"> <li>● What skill are we focusing on? (<i>author’s purpose</i>)</li> <li>● What is author’s purpose? (<i>the reason(s) why an author wrote a text</i>)</li> <li>● How do we determine author’s purpose? (<i>Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.</i>)</li> <li>● Why do good readers determine the author’s purpose? (<i>Good readers determine author’s purpose to know why the text was written.</i>)</li> </ul>
5 minutes	Teacher Modeling & Check for Understanding - General example - Previous text	<p><b>Say:</b> There are different reasons why authors write. Those reasons are to:</p> <ul style="list-style-type: none"> <li>● Persuade: The author tries to convince the reader of something.</li> <li>● Inform: The author gives information about a topic.</li> <li>● Explain: The author gives directions or steps to follow.</li> <li>● Entertain: The author writes something for the reader to enjoy.</li> <li>● Express ideas or feelings: The author describes feelings and emotions to tell about a topic.</li> </ul> <p><b>Say:</b> Sometimes an author has more than one purpose when they write. They might want to entertain you AND persuade you.</p>

		<p><b>Teacher Model:</b></p> <p><b>Say:</b> Last week we read, <i>Because of Winn-Dixie</i>. As I read, I thought about what the author’s purpose might be.</p> <p><b>Say:</b> First, I thought about what kind of information was in that story. At the beginning there’s that funny part about how Miss Franny Block thinks Winn-Dixie is a bear. There was another funny part when Miss Franny told the story about asking her father for a small library.</p> <p><b>Say:</b> Both of those parts in the story are fiction. They’re also funny. There are no facts in that part of the story, just details that made us laugh.</p> <p><b>Say:</b> Because <i>Winn Dixie</i> has details that made us laugh, I can tell that the author’s purpose is to entertain.</p> <p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>• What skill did I just use as a good reader? (<i>You determined the author’s purpose.</i>)</li> <li>• How did I do that? (<i>You thought about the text and figured out what kind of information it gave. That let you know the purpose of Winn-Dixie was to entertain.</i>)</li> </ul>
3 minutes	Explicit Selection Vocabulary Instruction (when appropriate)	<p><b>Words to teach:</b></p> <ul style="list-style-type: none"> <li>• <u>docks</u>: platforms built on the shore or out from the shore; wharves; piers</li> <li>• <u>wharf</u>: platform built on the shore or out from the shore; docks; piers</li> <li>• <u>yearned</u>: felt a longing or desire</li> <li>• <u>bargain</u>: a good value for the money</li> <li>• <u>mutual</u>: experienced by two or more people</li> </ul> <p><b>Say:</b> In our story today, there are some words that you might not have heard before. The story is historical and about exploration, so there are some words that are specific to that time and topic that you don’t know.</p> <p>The first word is <b>docks</b>. Say it. (Students chorally say the word). A dock is a platform built on the shore or out from the shore. What is a dock? Turn to a partner and use <i>dock</i> in a sentence.</p> <p>Repeat this structure for the other words.</p>
<b>During Reading</b>		
5 minutes	Think Aloud & Check for Understanding	<p><b>Say:</b> Now we are going to start, “Lewis and Clark and Me”. (stop after page 56). I’m going to be looking for readers who follow along with their tracking finger as I read. Remember to pay attention to what information the author shares to help you decide what the purpose is.</p> <p><b>[Stop reading after the entry on the top of page 54]</b></p> <p><b>Say:</b> The author is sharing historical facts. When an author shares factual and historical information, I know the purpose is to inform. The author’s purpose is to inform.</p>

		<p><b>[Continue reading until the end of page 54]</b></p> <p><b>Say:</b> Another piece of information that I've figured out from what the author has shared is that the narrator of this story is a dog. That makes the story funny and interesting. The author's purpose must also be to entertain.</p> <p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>● What skill did I just use as a good reader? (<i>You determined author's purpose.</i>)</li> <li>● How did I do that? (<i>You identified the information that the author shared in the text and made inferences about it. You determined that the information was meant to inform and entertain.</i>)</li> <li>● What clues did I use to determine author's purpose? (<i>The information shared at the beginning gives the reader new information. The fact that the narrator is a dog is entertaining.</i>)</li> <li>● Why did I determine that there was more than one author's purpose? (<i>Because sometimes authors have more than one reason for writing a text.</i>)</li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>● The author's purpose of <i>Lewis and Clark and Me</i> is to inform and entertain. <ul style="list-style-type: none"> <li>○ Have students repeat that statement</li> </ul> </li> </ul>
10 minutes	Guided Skill-Aligned Comprehension Questions	<p><b>[Stop reading after page 55]</b></p> <p><b>Say:</b> What is the author's purpose in this part of the text? (<i>First, we identify the kind of information that is being shared. We learned that Newfoundland dogs have webbed toes and a double coat. These are factual details that give readers information about a specific kind of dog. That helps us determine that the author's purpose is to inform. We can also identify that the dog continues to narrate. This makes the story interesting for readers. That helps us determine that the author's purpose is also to entertain.</i>)</p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>● What new information was shared? (<i>Facts about Newfoundlands</i>)</li> <li>● When facts are shared, what purpose does the author have? (<i>to inform me</i>)</li> <li>● What makes this text enjoyable? (<i>The dog is telling the story</i>)</li> <li>● When an author makes the text enjoyable, what purpose does he/she have? (<i>To entertain</i>)</li> <li>● When an author shares facts in an enjoyable way, what two purposes does the author have for writing the text? (<i>To inform and entertain</i>)</li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>● The author's purpose of <i>Lewis and Clark and Me</i> is to inform and entertain. <ul style="list-style-type: none"> <li>○ Have students repeat that statement</li> </ul> </li> </ul> <p><b>[Stop reading after page 56]</b></p> <p><b>Say:</b> How does this part of the story help verify the author's purpose? (<i>The information shared is a story of the dog showing off his ability to retrieve. He talks</i></p>

		<p><i>about being feeling proud. These parts of the story are enjoyable. That helps us determine that the author's purpose is to entertain. At the end of the selection, there's a diary entry from Lewis explaining that he decided to buy the dog. That is factual information from a historical document. The purpose of factual information is to inform.)</i></p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• What new information was shared? <i>(A real diary entry from Lewis saying he bought the dog.)</i></li> <li>• When facts are shared, what purpose does the author have? <i>(to inform me)</i></li> <li>• What makes this text enjoyable? <i>(The dog is proud of himself for retrieving.)</i></li> <li>• When an author makes the text enjoyable, what purpose does he/she have? <i>(To entertain)</i></li> <li>• When an author shares facts in an enjoyable way, what two purposes does the author have for writing the text? <i>(To inform and entertain)</i></li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• The author's purpose of <i>Lewis and Clark and Me</i> is to inform and entertain. <ul style="list-style-type: none"> <li>○ Have students repeat that statement</li> </ul> </li> </ul>
2 minutes	Spiral Review Questions	<p><b>Character/Setting &amp; Sequence of Events</b></p> <p><b>[Stop after page 54]</b></p> <ul style="list-style-type: none"> <li>• [summary] <b>Summarize the events of the story so far.</b> <i>(The dog, Seaman, is with his owner at the docks. The owner is trying to sell the dog. A man named Lewis is interested in Seaman and talks to his owner. Lewis also introduces himself to Seaman.)</i></li> </ul> <p><b>[Stop after page 55]</b></p> <ul style="list-style-type: none"> <li>• [Summary] <b>Summarize the reasons why Seaman is the perfect dog to accompany Lewis on his trip.</b> <i>(Seaman is a Newfoundland. His toes are webbed, making him a great swimmer able to rescue drowning men. He also has a waterproof, double coat to keep him warm in the water. A dog that is good in the water is perfect for an explorer.)</i></li> </ul>
<b>After Reading</b>		
6 minutes	Independent Practice	<p><b>Say:</b> Now you are going to practice determining author's purpose. (provide CR template) You will write your constructed response on this piece of paper. As you respond, remember, think about the information that is shared and what it's meant to do for the reader. [provide response time and circulate to provide feedback]</p> <p><b>What is the author's purpose in this text? What information have you used to help you determine the author's purpose of the text so far?</b> <i>(First, we identified the information that was shared. This story has real entries from Lewis's diary. Those give historical facts. We also learned facts about Newfoundland dogs. When factual information is shared, it means the author wants to teach the reader new things. This means the author's purpose is to inform. Lewis and Clark and Me also has information that we enjoyed. The narrator is a dog. The dog tells stories about trying to impress Lewis. The author made us enjoy the story with this information. That means the author's purpose was also to entertain.)</i></p>

1 minute	Closing	<p><b>Say:</b> You did a fantastic job practicing our skill for the day! We will continue working on this tomorrow with a new story and new characters.</p> <p><b>Check for understanding:</b></p> <ul style="list-style-type: none"> <li>● What skill did we focus on today? (<i>author's purpose</i>)</li> <li>● What is author's purpose? (<i>the reason the author wrote the text</i>)</li> <li>● How do we determine author's purpose? (<i>Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.</i>)</li> <li>● Why do good readers determine the author's purpose? (<i>Good readers determine author's purpose to know why the text was written.</i>)</li> </ul>
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SAMPLE

## 3-5 Constructed Response Writing

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**Directions:** Using the space provided, answer the following question. Support your answer with evidence from the text.

**Day 1 Prompt:** What is the author's purpose in this text? What information have you used to help you determine the author's purpose of the text so far?

<p style="text-align: center;"><b>Restate &amp; Answer</b></p> <p style="text-align: center;"><i>Restate the prompt and answer the prompt in one sentence</i></p>	
<p style="text-align: center;"><b>Cite</b></p> <p style="text-align: center;"><i>Give specific text evidence that supports your answer</i></p> <p><b>Sentence starters:</b></p> <ul style="list-style-type: none"> <li>• In the text it said, "____."</li> <li>• The author wrote, "____."</li> <li>• An example in paragraph ____ is, "____."</li> <li>• According to the text, "____."</li> <li>• The text explicitly states, "____."</li> <li>• In paragraph ____, the author states, "____."</li> </ul>	
<p style="text-align: center;"><b>Explain</b></p> <p style="text-align: center;"><i>Explain how your evidence supports your answer</i></p> <p><b>Sentence starters:</b></p> <ul style="list-style-type: none"> <li>• This means ____.</li> <li>• This is an example of ____.</li> <li>• This shows that ____.</li> <li>• This is because ____.</li> <li>• This proves ____.</li> <li>• This demonstrates ____.</li> </ul>	

Time Stamps		Day 2 – Main Selection, Part 2
Unit/Week	Unit 1 – Week 2 – Day 2 – “Lewis and Clark and Me”	
Standard	RI.4.1	
Skill Focus	Author’s Purpose	
I Can Statement	I can determine author’s purpose by analyzing the information in the text to find out the reasons it was written.	
<b>Before Reading</b>		
1 minute	Introduce Text	<p><b>Say:</b> Today, we’re going to continue reading from “Lewis and Clark and Me”. Let’s start by reviewing what we read yesterday.</p> <ul style="list-style-type: none"> <li>• Turn and tell your partner the main events from the first part of story. [TPS – 10 sec each]</li> </ul>
4 minutes	Skill Focus Check for Understanding	<p><b>Say:</b> As we read, we are going to practice the same skill from yesterday.</p> <p><b>Revisit previous day’s skills [revisit anchor chart and reasons for writing]:</b></p> <ul style="list-style-type: none"> <li>• What skill did we focus on yesterday? (<i>author’s purpose</i>)</li> <li>• What is author’s purpose? (<i>the reason the author wrote the text</i>)</li> <li>• How do we determine author’s purpose? (<i>Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.</i>)</li> <li>• Why do good readers determine the author’s purpose? (<i>Good readers determine author’s purpose to know why the text was written.</i>)</li> </ul>
<b>During Reading</b>		
5 minutes	Think Aloud and Check for Understanding	<p><b>Say:</b> Now we are going to read the second half of, “Lewis and Clark and Me” (start on page 57 and finish the story). I’m going to be looking for readers who follow along with their tracking finger as I read. Remember to pay attention to the information that is shared and how it helps reveal the author’s purpose.</p> <p><b>[Stop reading after page 57]</b></p> <p><b>Say:</b> At this point, I’ve gotten some new information. The author shared that the boat is heading down the Ohio River. This is a real place, so this must be factual information. I know that when an author shares facts that the purpose is to inform. I also noticed that the author was sharing more personal information about the dog’s thoughts and feelings. The dog is excited about being on the water. These details are enjoyable. When I enjoy what I’m reading, I know the author’s purpose is to entertain.</p> <p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>• What skill did I just use as a good reader? (<i>You determined author’s purpose.</i>)</li> <li>• How did I do that? (<i>You identified the information that the author shared in the text and made inferences about it. You determined that the information was meant to inform and entertain.</i>)</li> <li>• What clues did I use to determine author’s purpose? (<i>The information shared about the Ohio River informs the reader using new information. The fact that the narrator is a dog is entertaining.</i>)</li> <li>• Why did I determine that there was more than one author’s purpose? (<i>Because sometimes authors have more than one reason for writing a text.</i>)</li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• The author’s purpose of “Lewis and Clark and Me” is to inform and entertain. <ul style="list-style-type: none"> <li>○ Have students repeat that statement.</li> </ul> </li> </ul>

13 minutes	Guided Skill- Aligned Comprehension Questions	<p><b>[Stop reading after page 59]</b></p> <p><b>Say:</b> What author’s purpose can be determined from pages 58-59? <i>(The information shared in the text describes the river as being shallow with not a very strong current. Also, we learn that the crew had to dig channels when the river was low or hire oxen to pull the boat. We also learn the information that it is unusual for squirrels to swim. All of this information is factual and helps us learn something new. When the author gives new information, the purpose is to inform. Some other information that is shared is that the dog is surprised by something. He really wants to go after the squirrels and does his best to get Lewis’s attention. This behavior is enjoyable. It’s also suspenseful. You wonder if the dog will get the squirrels. When the author includes information that is enjoyable and suspenseful, the purpose is to entertain.)</i></p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>● What new information was shared? <i>(Facts about how the boat travelled in low water and about squirrels.)</i></li> <li>● When facts are shared, what purpose does the author have? <i>(to inform me)</i></li> <li>● What makes this text enjoyable? <i>(The dog is telling the story and he really wants to go after the squirrels.)</i></li> <li>● When an author makes the text enjoyable or suspenseful, what purpose does he/she have? <i>(To entertain)</i></li> <li>● When an author shares facts in an enjoyable or suspenseful way, what two purposes does the author have for writing the text? <i>(To inform and entertain)</i></li> </ul> <p><b>Closing the Loop:</b></p> <ul style="list-style-type: none"> <li>● The author’s purpose of “Lewis and Clark and Me” s to inform and entertain. <ul style="list-style-type: none"> <li>○ Have students repeat that statement.</li> </ul> </li> </ul> <p><b>[Stop reading after page 60]</b></p> <p><b>Say:</b> What author’s purpose can be determined from page 60? <i>(The information shared in the text describes the dog jumping from the boat to get the squirrel. It also explains how the squirrel tried to get away. This scene was full of action. When an author includes action it makes the story enjoyable. The purpose of an enjoyable story is to entertain. The dog also shares that his webbed feet made swimming easy for him. This is a fact we learned earlier. Detailed facts help us learn something new. When an author shares facts, the purpose is to inform.</i></p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>● What new information was shared? <i>(Facts about how the dog’s webbed feet make him a good swimmer.)</i></li> <li>● When facts are shared, what purpose does the author have? <i>(to inform me)</i></li> <li>● What makes this text enjoyable? <i>(The action scene between the dog and the squirrel.)</i></li> <li>● When an author makes the text enjoyable, what purpose does he/she have? <i>(To entertain)</i></li> <li>● When an author shares facts in an enjoyable way, what two purposes does the author have for writing the text? <i>(To inform and entertain)</i></li> </ul> <p><b>Closing the Loop:</b></p> <ul style="list-style-type: none"> <li>● The author’s purpose of “Lewis and Clark and Me” is to inform and entertain. <ul style="list-style-type: none"> <li>○ Have students repeat that statement.</li> </ul> </li> </ul> <p><b>[Finish reading the text]</b></p>
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		<p><b>Say:</b> What is the author's purpose of the entire selection? <i>(To inform and entertain)</i></p> <p><b>Closing the Loop:</b></p> <ul style="list-style-type: none"> <li>The author's purpose of "Lewis and Clark and Me" is to inform and entertain. <ul style="list-style-type: none"> <li>Have students repeat that statement.</li> </ul> </li> </ul>
5 minutes	Spiral Review Questions	<p><b>Sequence of Events</b></p> <p><b>[Stop reading after page 57]</b></p> <ul style="list-style-type: none"> <li>[Summary] <b>What happened in the story before this scene on the river?</b> <i>(Lewis meets the dog, Seaman, and buys him from a man on a dock. Seaman is going to travel with Lewis as he explores.)</i></li> </ul> <p><b>[Stop reading at end of text]</b></p> <ul style="list-style-type: none"> <li>[Summary] <b>Summarize this section of the text.</b> <i>(The dog is with the crew on a boat in the Ohio River. He suddenly spots hundreds of squirrels swimming across the river. Lewis commands the dog to get the squirrels and bring them back for the crew to eat. The dog is happy to follow the commands.)</i></li> </ul>
<b>After Reading</b>		
10 minutes	Independent Practice	<p><b>Say:</b> Now you are going to practice determining author's purpose. (provide CR template) You will write your constructed response on this piece of paper. As you respond, remember, we determine author's purpose by looking at the evidence and deciding why the author would have included it. [provide response time and circulate to provide feedback]</p> <p><b>What author's purpose is supported by page 61? Use text evidence to support your answer.</b> <i>(The information on page 61 shares how the rowers cheer on the dog as he collects squirrels. The dog is happy to do the work and is happy about the reaction he gets from Lewis. This information is shared to make readers feel good and enjoy the story. When an author shares information to make a story enjoyable, the purpose is to entertain. At the bottom of the page is an actual diary entry from Lewis's journal. The information he shares is factual about seeing the squirrels and commanding the dog to get them and bring them back to the boat. This tells us that this event really happened. That means the information in the text is about real historical events. When the author shares historical facts and details, the author's purpose is to inform.)</i></p>
2 minutes	Closing	<p><b>Say:</b> You did a fantastic job practicing our skill for the day! We will continue working on this tomorrow with a new story.</p> <p><b>Check for understanding:</b></p> <ul style="list-style-type: none"> <li>What skill did we focus on today? <i>(author's purpose)</i></li> <li>What is author's purpose? <i>(the reason the author wrote the text)</i></li> <li>How do we determine author's purpose? <i>(Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.)</i></li> <li>Why do good readers determine the author's purpose? <i>(Good readers determine author's purpose to know why the text was written.)</i></li> </ul>

### 3-5 Constructed Response Writing

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**Directions:** Using the space provided, answer the following question. Support your answer with evidence from the text.

**Day 2 Prompt:** What author’s purpose is supported by page 61? Use text evidence to support your answer.

<p style="text-align: center;"><b>Restate &amp; Answer</b></p> <p><i>Restate the prompt and answer the prompt in one sentence</i></p>	
<p style="text-align: center;"><b>Cite</b></p> <p><i>Give specific text evidence that supports your answer</i></p> <p><b>Sentence starters:</b></p> <ul style="list-style-type: none"> <li>• In the text it said, “_____.”</li> <li>• The author wrote, “_____.”</li> <li>• An example in paragraph _____ is, “_____.”</li> <li>• According to the text, “_____.”</li> <li>• The text explicitly states, “_____.”</li> <li>• In paragraph _____, the author states, “_____.”</li> </ul>	
<p style="text-align: center;"><b>Explain</b></p> <p><i>Explain how your evidence supports your answer</i></p> <p><b>Sentence starters:</b></p> <ul style="list-style-type: none"> <li>• This means _____.</li> <li>• This is an example of _____.</li> <li>• This shows that _____.</li> <li>• This is because _____.</li> <li>• This proves _____.</li> <li>• This demonstrates _____.</li> </ul>	

Time Stamps		Day 3 – Below Level Reader
Unit/Week		Unit 1 – Week 2 – Day 3 – “The Long Journey West”
Standard		RI.4.1
Skill Focus		Author’s Purpose and Questioning
I Can Statement		I can determine author’s purpose by analyzing the information in the text to find out the reasons it was written.
Before Reading		
1 minute	Introduce Text	<p><b>Say:</b> Today, we’re going to read a new expository text about Lewis and Clark called “The Long Journey West” by Joseph Blaire. Expository texts are about real people, places, and events.</p> <p>Read the title with me. (students chorally read title)</p>
4 minutes	Skill Focus Check for Understanding	<p><b>Say:</b> As we read, we are going to practice the same skill(s) from yesterday.</p> <p><b>Revisit previous day’s skills [revisit anchor chart]:</b></p> <ul style="list-style-type: none"> <li>• What skill did we focus on yesterday? (<i>author’s purpose</i>)</li> <li>• What is author’s purpose? (<i>the reason the author wrote the text</i>)</li> <li>• How do we determine author’s purpose? (<i>Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.</i>)</li> <li>• Why do good readers determine the author’s purpose? (<i>Good readers determine author’s purpose to know why the text was written.</i>)</li> </ul>
During Reading		
7 minutes	First Read	<p><b>Say:</b> First, we will read the text silky-smooth by keeping a steady pace and briefly pausing at commas and end marks. Be sure to pay attention to the information that is shared and how it helps us determine author’s purpose.</p> <p><b>Say:</b> I will start reading, while you follow along. When I say, ‘together,’ we will chorally read as one super-strong voice.</p> <p>Teacher reads pages 3-6. Students join chorally for pages 7-9. Teacher reads 10-13. Students join chorally for 14-15.</p>
3 minutes	Think Aloud and Check for Understanding	<p><b>Say:</b> Flip back to page 3. On this page, I’ll start by looking at the information the author shares. That will help me figure out the author’s purpose. There’s a date and the name of the president. We learn that this text is about a time when the US was smaller than it is now and that land west of the Mississippi River was owned by Spain and then France. President Jefferson wanted to buy the land for the United States. This is all factual information. When an author includes factual information, the author’s purpose is to inform.</p> <p><b>Check for understanding after think aloud:</b></p> <ul style="list-style-type: none"> <li>• What skill did I just use as a good reader? (<i>You determined author’s purpose.</i>)</li> <li>• How did I do that? (<i>You identified the information that the author shared in the text and made inferences about it. You determined that the information was meant to inform.</i>)</li> <li>• What clues did I use to determine author’s purpose? (<i>The information shared about the President, about the size of the US, and about the date.</i>)</li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• I know that the author’s purpose of “The Long Journey West” is to inform. <ul style="list-style-type: none"> <li>○ Have students repeat that statement.</li> </ul> </li> </ul>

10 minutes	Second Read Guided Skill- Aligned Comprehension Questions	<p><b>Say:</b> Now, you are going to independently read the story again.</p> <p>(students sticky note stopping locations [pages 9 and 13] prior to reading)</p> <p><b>[Stop reading after page 9]</b></p> <p><b>Say:</b> What author’s purpose can be determined on page 9? <i>(Information is shared about how Lewis and Clark were able to talk with Native Americans. We learned that Sacagawea helped them communicate, find food, and navigate. This information is made of facts and details. When an author shares facts and details the purpose is to inform.)</i></p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• What new information was shared? <i>(Facts about how Lewis and Clark communicated and how Sacagawea helped them.)</i></li> <li>• When facts are shared, what purpose does the author have? <i>(to inform me)</i></li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• I know that the author’s purpose of “The Long Journey West” is to inform. <ul style="list-style-type: none"> <li>○ Have students repeat that statement.</li> </ul> </li> </ul> <p><b>[Stop reading after page 13]</b></p> <p><b>Say:</b> What author’s purpose can be determined on page 13? <i>(The information on this page shares details about Fort Clatsop. It tells what Lewis and Clark did at the fort. It gives the date that the explorers began the trip home. These are facts. When an author shares facts, the purpose is to inform. The page also starts with a specific sensory detail. This could be to make the text enjoyable or keep the reader’s attention. When an author includes information to help the reader enjoy the text, the purpose is to entertain.)</i></p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• What new information was shared? <i>(facts about the Fort, details about the activities at the Fort, the date the explorers left the Fort.)</i></li> <li>• When facts are shared, what purpose does the author have? <i>(to inform me)</i></li> <li>• What makes this text enjoyable? <i>(The sensory details)</i></li> <li>• When an author makes the text enjoyable, what purpose does he/she have? <i>(To entertain)</i></li> <li>• When an author shares facts in an enjoyable way, what two purposes does the author have for writing the text? <i>(To inform and entertain)</i></li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• I know that the author’s purpose of “The Long Journey West” is to inform and entertain. <ul style="list-style-type: none"> <li>○ Have students repeat that statement.</li> </ul> </li> </ul> <p><b>[Finish reading the text]</b></p> <p><b>Say:</b> <b>What is the author’s purpose for this whole text?</b> <i>(The author shares information about the exploration of Lewis and Clark. When an author shares information, the purpose is to inform. The author also includes some sensory details. When an author adds details to make the story enjoyable, the purpose is to entertain. At the end, the author talks about America is great because of Lewis and Clark. This is an opinion. When an author shares an opinion of the topic, the purpose is to persuade.)</i></p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• When facts are shared, what purpose does the author have? <i>(to inform me)</i></li> </ul>
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		<ul style="list-style-type: none"> <li>When an opinion is shared, what purpose does the author have? (<i>to persuade</i>)</li> <li>When enjoyable details are used, what purpose does the author have? (<i>to entertain</i>)</li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>The author's purpose for the text is to inform, entertain, and persuade. <ul style="list-style-type: none"> <li>Have students repeat that statement.</li> </ul> </li> </ul>
3 minutes	Spiral Review Questions	<p><b>Sequence of Events</b></p> <p><b>[Ask before reading the selection]</b></p> <ul style="list-style-type: none"> <li>[summary] <b>What did you know about Lewis and Clark before reading this text?</b> (<i>They were explorers. They brought a dog with them. They sailed along the Ohio River.</i>)</li> </ul> <p><b>[Ask after reading the selection]</b></p> <ul style="list-style-type: none"> <li>[summary] <b>What do you know about Lewis and Clark after reading this text?</b> (<i>They were explorers hired by the President to explore the western part of the country and write about the rivers, mountains, and Native Americans. They worked with 45 other people and made maps, notes, and drawings. They had help communicating with the Native Americans along the way. The journey was difficult but they did finally reach the Pacific Ocean.</i>)</li> </ul>
<b>After Reading</b>		
10 minutes	Independent Practice	<p><b>Say:</b> Now you are going to practice determining author's purpose. (provide CR template) You will write your constructed response on this piece of paper. As you respond, remember, think about the information that's included and ask yourself why the author would tell you that. [provide response time and circulate to provide feedback]</p> <p><b>What author's purpose can be determined on page 15 of the text? Support your answer with text evidence.</b> (<i>The information shared is letting the reader know that President Jefferson achieved his goal. That's a fact. Facts means the author's purpose is to explain. The author also shares that the United States is better today because of people like Lewis and Clark. That's an opinion. When an author shares an opinion, the purpose of the text is to persuade.</i>)</p>
2 minutes	Closing	<p><b>Say:</b> Wow! You did awesome practicing our skill again! We will continue working on this tomorrow with a new text.</p> <p><b>Check for understanding:</b></p> <ul style="list-style-type: none"> <li>What skill did we focus on today? (<i>author's purpose</i>)</li> <li>What is author's purpose? (<i>the reason the author wrote the text</i>)</li> <li>How do we determine author's purpose? (<i>Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.</i>)</li> <li>Why do good readers determine the author's purpose? (<i>Good readers determine author's purpose to know why the text was written.</i>)</li> </ul>

## 3-5 Constructed Response Writing

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**Directions:** Using the space provided, answer the following question. Support your answer with evidence from the text.

**Day 3 Prompt:** What author’s purpose can be determined on page 15 of the text? Support your answer with text evidence.

<p style="text-align: center;"><b>Restate &amp; Answer</b></p> <p style="text-align: center;"><i>Restate the prompt and answer the prompt in one sentence</i></p>	
<p style="text-align: center;"><b>Cite</b></p> <p style="text-align: center;"><i>Give specific text evidence that supports your answer</i></p> <p><b>Sentence starters:</b></p> <ul style="list-style-type: none"> <li>• In the text it said, “____.”</li> <li>• The author wrote, “____.”</li> <li>• An example in paragraph ____ is, “____.”</li> <li>• According to the text, “____.”</li> <li>• The text explicitly states, “____.”</li> <li>• In paragraph ____, the author states, “____.”</li> </ul>	
<p style="text-align: center;"><b>Explain</b></p> <p style="text-align: center;"><i>Explain how your evidence supports your answer</i></p> <p><b>Sentence starters:</b></p> <ul style="list-style-type: none"> <li>• This means ____.</li> <li>• This is an example of ____.</li> <li>• This shows that ____.</li> <li>• This is because ____.</li> <li>• This proves ____.</li> <li>• This demonstrates ____.</li> </ul>	

Time Stamps		Day 4– Sleuth
Unit/Week		Unit 1 – Week 2 – Day 4 – “Alano Español: A Dying Breed”
Standard		RI.4.1
Skill Focus		Author’s Purpose
I Can Statement		I can determine author’s purpose by analyzing the information in the text to find out the reasons it was written.
Before Reading		
1 minute	Introduce Text	<p><b>Say:</b> Today, we’re going to read a short text from our Sleuth book titled “Alano Español: A Dying Breed”. Some weeks we will read a new story from this book. This book is going to help us becoming text detectives as we learn to dig deeper!</p> <p>Read the title with me. (students chorally read title)</p>
4 minutes	Skill Focus Check for Understanding	<p><b>[Refer to anchor chart]</b></p> <p><b>Say:</b> As we read, we are going to practice the same skill from yesterday.</p> <p><b>Revisit previous day’s skills [revisit anchor chart]:</b></p> <ul style="list-style-type: none"> <li>• What skill did we focus on yesterday? (<i>author’s purpose</i>)</li> <li>• What is author’s purpose? (<i>the reason the author wrote the text</i>)</li> <li>• How do we determine author’s purpose? (<i>Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.</i>)</li> <li>• Why do good readers determine the author’s purpose? (<i>Good readers determine author’s purpose to know why the text was written.</i>)</li> </ul>
During Reading		
10 minutes	First Read	<p><b>Say:</b> Now we are going to read a short text titled, “Alano Español: A Dying Breed”. I’m going to be looking for readers who follow along with their tracking finger as I read. Remember to pay attention to the order in which events happen in the story.</p> <p>Teacher reads sleuth selection out loud.</p>
10 minutes	Second Read  Guided Skill- Aligned Comprehension Questions	<p><b>Say:</b> Now, let’s read it again together chorally. (read Sleuth)</p> <p><b>Say:</b> Next, read it again with a partner. You will take turns reading each paragraph. Be sure to follow along as your partner reads because when he/she finishes his/her paragraph, you will have to retell it back in your own words. (read Sleuth)</p> <p><b>Say: What is the author’s purpose in the first paragraph?</b> (<i>The author shares information about the history of the Alans in Europe and Spain. This information is factual. When an author shares factual details, the purpose is to inform.</i>)</p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• What new information was shared? (<i>Facts about the history of the Alan people.</i>)</li> <li>• When facts are shared, what purpose does the author have? (<i>to inform me</i>)</li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• The author’s purpose in the first paragraph is to inform. <ul style="list-style-type: none"> <li>○ Have students repeat that statement</li> </ul> </li> </ul>

		<p><b>Say: What is the author’s purpose in the second paragraph?</b> <i>(The author shares information about the dog breed. The description includes factual details. When factual details are shared, the author’s purpose is to inform.)</i></p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• What new information was shared? <i>(The meaning of the name Alano Español, what the dogs look like, and how they act.)</i></li> <li>• When facts are shared, what purpose does the author have? <i>(to inform me)</i></li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• The author’s purpose in the second paragraph is to inform.             <ul style="list-style-type: none"> <li>○ Have students repeat that statement</li> </ul> </li> </ul> <p><b>Say: What is the author’s purpose for this whole text?</b> <i>(The author shares information about the dog breed and history. The description includes factual details. When factual details are shared, the author’s purpose is to inform. The author also includes only positive information about the dog and suggests that breeders have brought it to the United States. When an author shares only one side of the topic, the purpose is to persuade.)</i></p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• What new information was shared? <i>(The history of the breed, the meaning of the name Alano Español, what the dogs look like, how they act, how they’ve started to disappear, how breeders are trying to save them.)</i></li> <li>• When facts are shared, what purpose does the author have? <i>(to inform me)</i></li> <li>• When only positive information is shared (or just one side of a topic) what purpose does the author have? <i>(to persuade)</i></li> </ul> <p><b>Closing the Loop</b></p> <ul style="list-style-type: none"> <li>• The author’s purpose for the text is to inform and persuade.             <ul style="list-style-type: none"> <li>○ Have students repeat that statement.</li> </ul> </li> </ul>
<b>After Reading</b>		
10 minutes	Independent Practice	<p><b>Say:</b> Now you are going to practice determining author’s purpose. (provide CR template) You will write your constructed response on this piece of paper. As you respond, remember, think about the information that’s included and ask yourself why the author would tell you that. [provide response time and circulate to provide feedback]</p> <p><b>What information is shared to help you determine the author’s purpose in this text? What is the author’s purpose for writing this text?</b> <i>(The author shares a lot of information about the dogs and their traits. This information is factual. When factual details are shared, the author’s purpose is to inform. The information shared about the dog breed is positive. It tells about the good traits of the dog. A reader who is looking for a rare dog might be convinced to get this kind of a dog. When the information in a text can convince the reader of something, the author’s purpose is to persuade.)</i></p>

2 minutes	Closing	<p><b>Say:</b> Well done! You've worked so hard to practice our skill for the week. Give yourself a pat on the back!</p> <p><b>Check for understanding:</b></p> <ul style="list-style-type: none"> <li>● What skill did we focus on today? (<i>author's purpose</i>)</li> <li>● What is author's purpose? (<i>the reason the author wrote the text</i>)</li> <li>● How do we determine author's purpose? (<i>Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.</i>)</li> <li>● Why do good readers determine the author's purpose? (<i>Good readers determine author's purpose to know why the text was written.</i>)</li> </ul>
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## 3-5 Constructed Response Writing

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**Directions:** Using the space provided, answer the following question. Support your answer with evidence from the text.

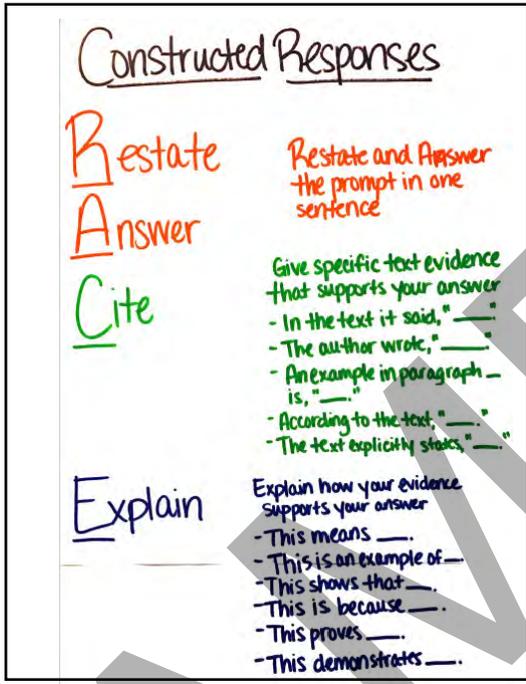
**Day 4 Prompt:** What information is shared to help you determine the author’s purpose in this text? What is the author’s purpose for writing this text?

<p style="text-align: center;"><b>Restate &amp; Answer</b></p> <p style="text-align: center;"><i>Restate the prompt and answer the prompt in one sentence</i></p>	
<p style="text-align: center;"><b>Cite</b></p> <p style="text-align: center;"><i>Give specific text evidence that supports your answer</i></p> <p><b>Sentence starters:</b></p> <ul style="list-style-type: none"> <li>• In the text it said, “_____.”</li> <li>• The author wrote, “_____.”</li> <li>• An example in paragraph _____ is, “_____.”</li> <li>• According to the text, “_____.”</li> <li>• The text explicitly states, “_____.”</li> <li>• In paragraph _____, the author states, “_____.”</li> </ul>	
<p style="text-align: center;"><b>Explain</b></p> <p style="text-align: center;"><i>Explain how your evidence supports your answer</i></p> <p><b>Sentence starters:</b></p> <ul style="list-style-type: none"> <li>• This means _____.</li> <li>• This is an example of _____.</li> <li>• This shows that _____.</li> <li>• This is because _____.</li> <li>• This proves _____.</li> <li>• This demonstrates _____.</li> </ul>	

# Best Practices for 3-5 Constructed Response Writing

Teaching, facilitating, & practicing

**Constructed Responses** are written responses to Reading Literature & Reading Informational text. Students will read text and respond to a prompt. Constructed responses are valuable and should be a regular practice because they support student comprehension and critical thinking about text.

Pacing Guide	Best Practice	
Between weeks 1-2 of school	<p>Build an anchor chart with your class that reflects the process they will take to complete a constructed response. The anchor chart teaches the process and will aid in the successful completion of daily constructed responses.</p> <p><b>SAMPLE:</b></p>  <p>The anchor chart is titled "Constructed Responses" and lists four steps: Restate, Answer, Cite, and Explain. Each step has associated prompts and examples.</p> <ul style="list-style-type: none"> <li><b>Restate:</b> Restate and Answer the prompt in one sentence.</li> <li><b>Answer:</b> Give specific text evidence that supports your answer. <ul style="list-style-type: none"> <li>- In the text it said, "..."</li> <li>- The author wrote, "..."</li> <li>- An example in paragraph is, "..."</li> <li>- According to the text, "..."</li> <li>- The text explicitly states, "..."</li> </ul> </li> <li><b>Cite:</b> (No specific prompts listed for Cite in the image)</li> <li><b>Explain:</b> Explain how your evidence supports your answer. <ul style="list-style-type: none"> <li>- This means ...</li> <li>- This is an example of ...</li> <li>- This shows that ...</li> <li>- This is because ...</li> <li>- This proves ...</li> <li>- This demonstrates ...</li> </ul> </li> </ul>	<p>Tips:</p> <ul style="list-style-type: none"> <li>• Make the anchor chart with the class</li> <li>• Complete one letter of RACE on anchor chart each day</li> <li>• Add sentence starters to the anchor chart</li> </ul>
Between weeks 2-4	<p><b>Model</b> Teacher models writing constructed responses using the RACE method with each day's prompt. The modeling assists students in understanding the process &amp; expectations for successful CR completion.</p>	<p>Tips:</p> <ul style="list-style-type: none"> <li>• Teacher thinks aloud while modeling</li> <li>• Teacher writes response using RACE anchor chart &amp; CR handout</li> <li>• Students copy response on CR handout</li> <li>• Students score one CR based on 2-point rubric</li> </ul>
Between weeks 4-7	<p><b>Shared Writing</b> Teacher facilitates a shared write of constructed responses using the RACE method with each day's prompt. Shared writing allows the teacher to guide student in successfully meeting expectations.</p>	<p>Tips:</p> <ul style="list-style-type: none"> <li>• Teacher guides students through RACE method</li> <li>• Teacher references RACE anchor chart for sentence starters</li> <li>• Teacher writes response on CR template for students to copy (everyone has same response)</li> <li>• Students score one CR based on 2-point rubric</li> </ul>
Between weeks 7-10+	<p><b>Independent Writing</b> Students independently write constructed responses.</p>	<p>Tips:</p> <ul style="list-style-type: none"> <li>• Teacher reads CR prompt to class</li> <li>• Teacher reminds students of expectations</li> <li>• Students write on CR handout</li> <li>• Students write using RACE method</li> <li>• Students score one CR based on 2-point rubric</li> <li>• Teacher circulates to provide feedback</li> </ul>

**Scoring:**

<b>Constructed Response Rubric</b>	
<b>Score</b>	<b>Response Features</b>
2 Points	<ul style="list-style-type: none"> <li>• Valid inferences and/or claims from the text where required by the prompt</li> <li>• Evidence of analysis of the text where required by the prompt</li> <li>• Reasoning and analysis of evidence chosen to support the prompt</li> <li>• Relevant facts, definitions, concrete details, and/or other information from the text to develop response according to the requirements of the prompt</li> <li>• Sufficient number of facts, definitions, concrete details, and/or other information from the text as required by the prompt</li> <li>• Grammatical errors do not impact readability</li> </ul>
1 Point	<ul style="list-style-type: none"> <li>• A mostly literal recounting of events or details from the text as required by the prompt</li> <li>• Some relevant facts, definitions, concrete details, and/or other information from the text to develop response according to the requirements of the prompt</li> <li>• Grammatical errors begin to impact readability or written in bullets</li> </ul>
0 Point	<ul style="list-style-type: none"> <li>• A response that does not address any of the requirements of the prompt or is totally inaccurate</li> <li>• A response that is not written in English</li> <li>• A response that is unintelligible or indecipherable</li> </ul>

Time Stamps		Day 1 – Skill Lesson
Unit/Selection	Unit 3- “The Two Brothers”	
Standard	RL.7.2 RL.7.3	
Skill Focus	Analyze Influence of Setting on Theme	
I Can Statement	I can analyze the influence that the setting of a narrative has on the theme of the narrative.	
Before Reading		
5 min.	Skill Focus Introduction & Check for Understanding	<p><b>[Build an anchor chart while students fill our personal poster]</b></p> <p><b>Say: (What)</b> We will analyze the influence that the setting of a narrative has on the theme of the narrative. The theme is the message the author wants the reader to understand about life. The setting is where and when the story takes place.</p> <p><b>Say: (How)</b> To analyze the influence that the setting has on the theme we:</p> <ol style="list-style-type: none"> <li>1. Look for details about the time and place of the narrative</li> <li>2. Look for clues about the way the setting affects the thoughts and actions of the characters</li> <li>3. Ask, “What message about life does the author want us to understand?” and “How did the setting influence that message?”</li> </ol> <p><b>Say: (Why)</b> Good readers analyze how the setting influences the theme in order to better understand the author’s message about life.</p> <p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>• What skill are we working on this week? (<i>analyzing the influence that the setting of a narrative has on the theme of the narrative</i>)</li> <li>• What is theme? (<i>the message the author wants the reader to understand about life</i>)</li> <li>• What is setting? (<i>where and when the story takes place</i>)</li> <li>• How will we analyze the influence that the setting has on the theme? (<i>First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, “What message about life does the author want us to understand?” and “How did the setting influence that message?”</i>)</li> <li>• Why do we do this as good readers? (<i>Good readers analyze how the setting influences the theme in order to better understand the author’s message about life.</i>)</li> </ul>
5 min.	Skill Focus Terminology	<p><b>[add to anchor chart] Say:</b> Everyone likes a story with a good plot, but there is more to a story than what happens to the characters. Often there is a deeper meaning, or theme. A theme is a message about life or human nature that a writer wants you to understand. A story usually has at least one theme. However, a story may have more than one theme. Some popular themes, such</p>

		<p>as those about loyalty and friendship, appear in many different stories. They are called recurring themes.</p> <p><b>Say:</b> It's easy to confuse a story's theme with its topic. Here's a way to tell the difference: A topic can be summed up in a word or two, such as "taking risks." A theme, however, is a writer's message about a topic. It usually takes at least one complete sentence to express a theme—for example, "Life's biggest rewards come from taking risks." Stories can mean different things to different people. Two people reading a story might describe its theme differently or find different themes.</p> <p><b>Say:</b> Point out that literature often deals with complex topics such as love and death. Topics like these can support many themes. Two authors might write about the same topic but express completely different ideas about it.</p> <p><b>Say:</b> Sometimes the theme of a story is stated directly by the narrator or a character. Most often, though, a theme is implied—hinted at but not stated directly. In such a case, you need to infer the theme by finding clues in the text.</p> <p><b>Say:</b> This week, we will focus on one clue. We will analyze the setting to determine the theme.</p>
9 min.	Teacher Modeling, Think Aloud, & Check for Understanding	<p><b>Say:</b> Watch and listen as I read some text and show you how to find the theme. <b>[Direct students to Holt p. 317.]</b> This excerpt is from a fable called "The Lion and the Mouse."</p> <p><b>[after reading lines 1-14] Say:</b> In order to find the theme of this excerpt, I first need to look for details about the time and place of the narrative. There are no concrete details about the place and time of this narrative, but I can infer that the place is maybe in Africa or in grasslands where a lion might live. Because there is a trap, I know the setting is a place where lions are hunted. There are also no concrete clues about time, but I can infer that the story takes place in the present or past.</p> <p><b>Say:</b> Next, I need to look for clues about the way the setting affects the thoughts and actions of the characters. At the beginning of the fable, the lion is not in danger. He feels safe and in control, so he lets the mouse go when he could have easily eaten him. At the end of the fable, the setting is not safe for the lion. He is stuck in a trap and not in control at all. He is angry and roaring because he is not in control and cannot escape. The roars draw the attention of the mouse who helps the lion escape.</p> <p><b>Say:</b> Then, I need to ask, "What message about life does the author want us to understand?" I believe the author is telling us that people should treat others in the same way that they want to be treated. Also, people never really know in advance who may prove to be a great friend.</p> <p><b>Say:</b> Finally, I need to ask: "How did the setting influence that message?" The setting in the fable determined the level of power and thus the character's actions. At the beginning, in a safe setting, the lion had all the power over the</p>

		<p>little mouse because of his size. At the end, in an unsafe setting, the lion had no power despite his large size. The mouse had the ability to help because he was small and could chew through the ropes.</p> <p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>• What skills did I just use as a good reader? (<i>You analyzed setting to determine the theme.</i>)</li> <li>• How did I do that? (<i>You looked for details about the time and place of the narrative. Then you looked for clues about the way the setting affects the thoughts and actions of the characters. Finally, you asked, “What message about life does the author want us to understand?” and “How did the setting influence that message?”</i>)</li> </ul>
1 min.	Introduce Text	<p><b>[Direct students to Holt p. 319]</b></p> <p><b>Say:</b> Next, let’s read a short story called “The Two Brothers” by Leo Tolstoy on p. 319. In this story, two brothers respond to a challenge by making very different choices. As you read, use the clues in the story to help you understand what the writer is saying about their choices.</p>
0 min.	Background Knowledge	All necessary background knowledge is provided in the text.
0 min.	Explicit Selection Vocabulary Instruction (when appropriate)	n/a
<b>During Reading</b>		
14 min.	Guided Skill-Aligned Comprehension Questions & Check for Understanding	<p><b>[after reading lines 1-10] What details do we have about the time and place of the narrative so far?</b> (<i>The story takes place in a forest with a river, bears, mountains, and a house. There are no specific details about time so far, but it could take place in the present or past.</i>)</p> <p><b>[after reading lines 11-39] What does the setting represent to the older brother?</b> (<i>danger, risk, challenge</i>)</p> <p><b>What does the older brother’s reaction to the setting’s challenges tell you about him?</b> (<i>The elder brother responds to the challenges by focusing on the dangers and refusing to go ahead. His reaction shows that he is practical, cautious, and fearful. He tends to focus on the negative rather than the positive.</i>)</p> <p><b>How are the brothers’ attitudes different regarding the setting and it’s challenges?</b> (<i>The elder brother’s outlook on life could be summarized as “If it seems too good to be true, it’s probably not true.” He does not believe in magical solutions to the problems of life. The younger brother’s outlook is more adventurous. He believes that amazing things can happen if a person has faith and is willing to take risks.</i>)</p> <p><b>[after reading lines 40-66] The brothers mention some possible themes in their conversation deciding what to do. What possible themes do they mention?</b> (<i>“In seeking great happiness small pleasures may be lost.” “A bird in the hand is worth two in the bush.” “He who is afraid of the leaves must not go into the forest.” “Beneath a stone no water flows.”</i>)</p>

		<p><b>How does each brother feel about the choice he made? Explain whether the brothers' attitudes have changed.</b> (<i>Each brother is happy with the choice he made. Neither brother has experienced a change in attitude.</i>)</p> <p><b>What message about life does the author want us to understand?</b> (<i>The writer is probably saying that people make choices based on what they are comfortable with, and as long as they are happy, all is well. Example themes could be: "Different strokes for different folks", "There are no absolutely right or wrong choices in life", "Individuals must decide what is right for them and what makes them happy", "People make choices that suit their personalities."</i>)</p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• What might the writer be saying about choices? (<i>"There are no absolutely right or wrong choices in life", "Individuals must decide what is right for them and what makes them happy", "People make choices that suit their personalities."</i>)</li> </ul> <p><b>How did the setting influence that message?</b> (<i>The setting of the river, mountain, and bears introduced the element of danger and risk and forced a choice – either they brothers could take risk and face danger and get the rewards or stay safe and not get the rewards. The setting forced a choice, and the message the author wanted to give was about choices.</i>)</p> <p><b>Closing the Loop:</b></p> <ul style="list-style-type: none"> <li>• In this short story, we analyzed the setting carefully and then thought about the message the author was trying to live and how the setting influenced that theme.</li> </ul>
<b>After Reading</b>		
10 min.	Independent Practice – Constructed Response	<p><b>Say:</b> Now that you've read and comprehended "The Two Brothers," you will answer one question on your own. <b>[distribute Constructed Response template]</b> You will write a constructed response on this paper. As you respond, remember to support your answer with evidence from the text. <b>[Provide response time and circulate to provide feedback.]</b></p> <p><b>What is one theme of this story, and how did the setting influence the theme?</b></p>
1 min.	Closing	<p><b>Say:</b> You did a fantastic job practicing our skill for the day! We will continue working on this skill for the rest of the week with our text selections.</p> <p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>• What skill are we working on this week? (<i>analyzing the influence that the setting of a narrative has on the theme of the narrative</i>)</li> <li>• What is theme? (<i>the message the author wants the reader to understand about life</i>)</li> <li>• What is setting? (<i>where and when the story takes place</i>)</li> <li>• How will we analyze the influence that the setting has on the theme? (<i>First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, "What message about life does the</i></li> </ul>

		<p><i>author want us to understand?” and “How did the setting influence that message?”)</i></p> <ul style="list-style-type: none"><li>• <i>Why do we do this as good readers? (Good readers analyze how the setting influences the theme in order to better understand the author’s message about life.)</i></li></ul>
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SAMPLE

Time Stamps		Day 2 – Selection 2, Part 1
Unit/Selection		Unit 3- “Amigo Brothers” (p. 324-329)
Standard		RL.7.2 RL.7.3
Skill Focus		Analyze Influence of Setting on Theme
I Can Statement		I can analyze the influence that the setting of a narrative has on the theme of the narrative.
<b>Before Reading</b>		
3 min.	Introduce Text	<p><b>Say:</b> We face competition all the time, whether we are competing for someone’s attention or for the best grade. And while some competitions are friendly and even fun, others can be brutal. In “Amigo Brothers,” best friends Antonio and Felix find out if their deep friendship can survive an explosive competition.</p> <p><b>Say:</b> Jot down a list of times when you competed with one or more friends. <b>[1 minute]</b> Now, review your list. Talk to a partner about which experiences helped your friendship and which experiences hurt your friendship. <b>[1 minute]</b></p>
2 min.	Background Knowledge	<p><b>Say:</b> Antonio and Felix are Puerto Rican teenagers in New York who share a love of boxing. Their competition for a spot in a tournament threatens their close friendship. They are evenly matched, and both are fiercely determined to win.</p> <p><b>[Read bottom of sidebar on p. 323 – “Background to the Story”]</b></p>
6 min.	Explicit Selection Vocabulary Instruction (when appropriate)	<p><b>Words to Teach:</b></p> <ul style="list-style-type: none"> <li>• <u>barrage</u>: a rapid, heavy attack</li> <li>• <u>devastating</u>: very effective in causing pain or destruction</li> <li>• <u>pensively</u>: thoughtfully</li> <li>• <u>torrent</u>: violent, rushing stream</li> </ul> <p><b>Say:</b> In today’s text, we have a few words that you may not be familiar with. Let’s learn them together to help us understand the text.</p> <p>The word is <b>barrage</b>. What’s the word? A <b>barrage</b> is a <i>rapid, heavy attack</i>. (Give an example.) What does <b>barrage</b> mean? Turn to a partner and use <b>barrage</b> in a sentence.</p> <p><b>[repeat for remaining words]</b></p>
1 min.	Skill Focus Check for Understanding	<p><b>Say:</b> Let’s review the skill we are working on this week. <b>[Direct student attention to yesterday’s anchor chart.]</b></p> <p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>• What skill are we working on this week? (<i>analyzing the influence that the setting of a narrative has on the theme of the narrative</i>)</li> </ul>

		<ul style="list-style-type: none"> <li>• What is theme? (<i>the message the author wants the reader to understand about life</i>)</li> <li>• What is setting? (<i>where and when the story takes place</i>)</li> <li>• How will we analyze the influence that the setting has on the theme? (<i>First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, "What message about life does the author want us to understand?" and "How did the setting influence that message?"</i>)</li> <li>• Why do we do this as good readers? (<i>Good readers analyze how the setting influences the theme in order to better understand the author's message about life.</i>)</li> </ul>
<b>During Reading</b>		
1 min.	Set the Purpose for Reading	<b>Say:</b> As we read today, we will practice paying attention to setting. We will analyze the setting and see how it influences the theme, or main message the author is trying to convey.
5 min.	Think Aloud and Check for Understanding	<p><b>Say:</b> Watch and listen as I demonstrate looking for setting and how it influences theme.</p> <p><b>[after reading lines 1-34] Say:</b> From this first section of text, I'm already seeing quite a few details about setting. Felix and Antonio grew up on the Lower East Side of Manhattan, which is New York City. They live in the same tenement building, which the book tells me is a rundown apartment building in which mostly poor families live. This helps me understand that the two are best friends that live very close together, and both of them are likely poor. They are both influenced by the big city culture in which they live. However, it is clear they have not been negatively affected by the city atmosphere because the author says that other students have acquired negative habits while Antonio and Felix have remained positive dreamers. They spent a lot of their time at gyms, both the Boys club and the Pro's Gym, because they both dream of being a boxing champion. There are not any direct details about the time in which this story takes place, but from the clues, I can infer that it is set in the 1970s. Certain period details give clues to the story's setting. Antonio's long hair and Felix's "natural Afro style" both became popular in the late 1960s. The boys' interest in boxing is in tune with the renewed interest in the sport that began with the career of Muhammad Ali in the 1960s. I can't determine the theme yet because good readers read the entire text before determining the main message. But, I can predict it might be something about friendship or competition.</p> <p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>• What skills did I just use as a good reader? (<i>You analyzed setting to later determine the theme.</i>)</li> <li>• How did I do that? (<i>You looked for details about the time and place of the narrative. Then you looked for clues about the way the setting affects the thoughts and actions of the characters.</i>)</li> </ul>

14 min.	Guided Skill-Aligned Comprehension Questions	<p><b>Say:</b> Let's continue reading "Amigo Brothers" together. We will continue to look for details about the setting, thinking about how the setting affects the characters and their actions, and determining the main message or theme of the story.</p> <p><b>[after reading lines 35-77] What details offer clues to the setting?</b> <i>(The boys live near each other in New York City in the Lower East Side with other immigrants. They live close enough together that they can meet to work out together. They boys are running outside by the East River and stop to have a conversation.)</i></p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• Where do the boys live? <i>(In New York City, in the same neighborhood in the Lower East Side with other immigrants)</i></li> <li>• Where do the boys live in proximity with one another? <i>(very close, close enough to meet to work out)</i></li> <li>• Where are the boys having a conversation in this particular section? <i>(by the East River)</i></li> </ul> <p><b>How does the setting in this section affect the character's thoughts and actions?</b> <i>(The boys have become close friends because of where they live. The boys are having a conversation in the open air out by the river, not in their gym, which might help them to speak more openly and honestly as friends rather than competitors. Because of their immigrant location and because of their identity as immigrants, they speak with intermittent Spanish words and Spanish slang. Because the boys live so close and are such close friends, they have decided to not see each other until the day of the fight. Antonio will say with his Aunt in the Bronx and train at a different gym.)</i></p> <p><b>Scaffolded Questions:</b></p> <ul style="list-style-type: none"> <li>• How has the boy's close living proximity affected their actions? <i>(The boys have become close friends because of where they live. Because the boys live so close and are such close friends, they have decided to not see each other until the day of the fight. Antonio will say with his Aunt in the Bronx and train at a different gym.)</i></li> <li>• How does the outdoor setting at the East River affect their thoughts and actions? <i>(The boys are having a conversation in the open air out by the river, not in their gym, which might help them to speak more openly and honestly as friends rather than competitors.)</i></li> <li>• How does the immigrant neighborhood affect the ways they speak? <i>(Because of their immigrant location and because of their identity as immigrants, they speak with intermittent Spanish words and Spanish slang.)</i></li> </ul> <p><b>Think back to our lesson on text features. Why might the author have included the visuals on page 327?</b> <i>(to suggest a possibility of what Antonino and Felix might look like; to invite the reader to compare and contrast his or her mental picture of Antonino and Felix with this representation.)</i></p> <p><b>[after reading lines 78-130] What are the characters' internal conflicts?</b> <i>(They both want to win but not hurt the other. They both work to get excited about the fight in different ways.)</i></p>
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		<p><b>How does the setting affect the characters thoughts and actions?</b>  <i>(Because they are separate, they get excited for the fight in different ways. They both get to consider their inner conflicts in separate, different ways. Felix watches a movie and pretends he and Antonio are characters in the movie. Antonio goes up to the rooftop to think about the situation and prepare.)</i></p> <p><b>How does the atmosphere in the theater affect Felix?</b> <i>(The crowd “going out of its head” and “roaring in blood lust at the butchery going on” got him more hyped up and helped him imagine beating Antonio.)</i></p> <p><b>How does the neighborhood setting affect Felix after he leaves the theater?</b> <i>(He lives in a gang area, and he passes kids wearing gang colors. Even though he is Puerto Rican like them, they look at him suspiciously. He bobs and weaves and demonstrates his strong punches to intimidate them, which he does.)</i></p> <p><b>Closing the Loop:</b></p> <ul style="list-style-type: none"> <li>After reading the first half of this story, we’ve thought about how the setting might affect Antonino and Felix as they prepare for the big fight. Their close proximity in New York City has made it difficult to imagine winning at the expense of their friend. So, they decide to split up before the fight and prepare for the fight in their own unique ways. We cannot yet determine the theme of the story because we still have more to read, but we can still predict it will be something about friendship, competition, or winning based on what’s going on in the story so far.</li> </ul>
<b>After Reading</b>		
9 min.	Independent Practice: Text Analysis Worksheet	<p><b>Say:</b> Now that we’ve read through the first half of this story, you will have an opportunity to go back through and review the details about the setting so far and how they affect the character’s thoughts and actions. <b>[distribute Text Analysis Worksheet]</b></p> <p><b>Say:</b> Please go back and find clues from characters, setting, and conflict that might help you determine the theme tomorrow when we finish reading the story. Note these details and clues in the chart on your worksheet. <b>[Circulate to check on student work, coach, and provide feedback.]</b></p>
1 min.	Closing	<p><b>Say:</b> Wow! You did awesome job practicing our skill today! We will continue working on this tomorrow as we finish reading the rest of the autobiography.</p> <p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>What skill are we working on this week? <i>(analyzing the influence that the setting of a narrative has on the theme of the narrative)</i></li> <li>What is theme? <i>(the message the author wants the reader to understand about life)</i></li> <li>What is setting? <i>(where and when the story takes place)</i></li> <li>How will we analyze the influence that the setting has on the theme? <i>(First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions)</i></li> </ul>

		<p><i>of the characters. Then ask, “What message about life does the author want us to understand?” and “How did the setting influence that message?”)</i></p> <ul style="list-style-type: none"><li>• <i>Why do we do this as good readers? (Good readers analyze how the setting influences the theme in order to better understand the author’s message about life.)</i></li></ul>
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SAMPLE

Time Stamps		Day 3 – Selection 2, Part 2
Unit/Selection		Unit 3- “Amigo Brothers” (p. 330-334)
Standard		RL.7.2 RL.7.3
Skill Focus		Analyze Influence of Setting on Theme
I Can Statement		I can analyze the influence that the setting of a narrative has on the theme of the narrative.
<b>Before Reading</b>		
1 min.	Review Previous Day’s Text	<b>Say:</b> Yesterday, we read the first half of a story called “Amigo Brothers”. Turn to a partner and summarize what we read yesterday. Be sure to think about the characters, setting, and conflict. <b>[1 minute]</b>
4 min.	Explicit Selection Vocabulary Instruction (when appropriate)	<p><b>Words to Teach</b></p> <ul style="list-style-type: none"> <li>• <u>perpetual</u>: continual; unending</li> <li>• <u>unbridled</u>: lacking restraint or control</li> <li>• <u>dispel</u>: to get rid of</li> <li>• <u>bedlam</u>: a noisy confusion</li> <li>• <u>flail</u>: to wave wildly</li> <li>• <u>clarity</u>: clearness of mind</li> </ul> <p><b>Say:</b> In today’s story, we have a few words that you may not be familiar with. Let’s learn them together to help us understand the text.</p> <p>The word is <b>perpetual</b>. What’s the word? Something <b>perpetual</b> is continual or unending. What is a <b>perpetual</b>? (Students chorally say the definition.) Turn to a partner and use <b>perpetual</b> in a sentence.</p> <p><b>[repeat process for remaining words]</b></p>
1 min.	Skill Focus Check for Understanding	<p><b>Say:</b> Today we’re going to finish reading “Amigo Brothers” by Piri Thomas. We will continue to practice looking for details about the setting, thinking about how setting affects the characters’ actions and thoughts, and identifying a theme from the clues we are given about the author’s main message.</p> <p><b>Revisit Skill [revisit anchor chart]:</b></p> <ul style="list-style-type: none"> <li>• What skill are we working on this week? (<i>analyzing the influence that the setting of a narrative has on the theme of the narrative</i>)</li> <li>• What is theme? (<i>the message the author wants the reader to understand about life</i>)</li> <li>• What is setting? (<i>where and when the story takes place</i>)</li> <li>• How will we analyze the influence that the setting has on the theme? (<i>First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, “What message about life does the author want us to understand?” and “How did the setting influence that message?”</i>)</li> </ul>

		<ul style="list-style-type: none"> <li>Why do we do this as good readers? (<i>Good readers analyze how the setting influences the theme in order to better understand the author's message about life.</i>)</li> </ul>
<b>During Reading</b>		
1 min.	Set the Purpose for Reading	<b>Say:</b> Let's continue reading together, looking for setting and how it affects the theme.
25 min.	Guided Skill-Aligned Comprehension Questions	<p><b>[Read the text using a variety of teacher read aloud, independent reading, or partner reading.]</b></p> <p><b>[after reading lines 131-171] In lines 146–153, how has the competition between Felix and Antonio affected other people in the neighborhood?</b> (<i>Many people in the neighborhood are interested in who will win the upcoming fight. Many are placing bets on their favorite fighter. Backers of Felix and Antonio think each has strengths that will allow him to win.</i>)</p> <p><b>The following quote describes the setting of the neighborhood before the fight. How are Antonio and Felix affected by this setting?</b> <i>"Large posters plastered all over the walls of local shops announced the fight between Antonio Cruz and Felix Vargas as the main bout. The fight had created great interest in the neighborhood."</i> (<i>They both feel well-liked and respected, but they also feel a lot of pressure to perform well and to win.</i>)</p> <p><b>What can you infer about Antonio's attitude toward Felix on the day of the fight?</b> (<i>Waving is a friendly gesture, so Antonio probably thinks of Felix as a friend.</i>)</p> <p><b><u>Scaffolded Question:</u></b></p> <ul style="list-style-type: none"> <li>Antonio waves at Felix. What can you infer about what he is feeling towards Felix? (<i>Waving is a friendly gesture, so Antonio probably thinks of Felix as a friend.</i>)</li> </ul> <p><b>The setting of the fight moves from the Boys Club to Tompkins Square Park. What is the effect of this change in setting?</b> (<i>The fight will have more spectators and be more publicized. Thus, there is more pressure on the boys.</i>)</p> <p><b>How has this pressure affected both Felix and Antonio?</b> (<i>Antonio is having doubts about wanting to fight Felix; he is wondering if it will affect their friendship. They are both praying for a quick, easy knockout in the first round so as not to prolong the time they have to fight. They are both thinking of the fight constantly.</i>)</p> <p><b>[after reading lines 172-234] In lines 192–195, how do you think the boys feel at this moment? How does the setting influence the way the boys feel?</b> (<i>They are probably feeling a bit nervous at finally facing each other in the ring. They are both wondering what the other is thinking. They show their respect by nodding and acknowledging their friendship. The setting puts them as opponents in the ring with people cheering for each one. It shows the match is important and that they need to stay focused.</i>)</p> <p><b><u>Scaffolded Questions:</u></b></p>

- Why does the text say, “Antonio tried to be cool”? (*He is not feeling cool; he is feeling nervous.*)
- Why does the text say, “When Antonio turns, he finds Felix looking at him”? (*Both boys wonder what the other is thinking.*)
- Why do the boys nod quickly and then turn away? (*They want to show respect to one another. They don’t want to focus on their friendship but on the fight.*)

**How might the noise of the crowd affect the fighters?** (*It likely makes them more stressed and gives them more pressure, but it might also make them more excited and more determined.*)

**Closing the Loop:**

- At this point, the fight is in full swing. Felix and Antonio both seem to be focused on winning and not thinking too much about their friendship. They seem to be excited by the crowd noise, not stressed. Yet, neither one of them achieved their hope of a clean first round knockout.

**[after reading lines 235-334] Which line from the text best shows that Felix and Antonio benefit in the fight from knowing each other so well?**

(*“Antonio danced in carefully. He knew Felix had the habit of playing possum when hurt, to sucker an opponent within reach of the powerful bombs he carried in each fist.”*)

**How is the setting affecting the fighters in the thick of the fight?** (*The support of the frenzied crowd helps the fighters keep going even when they are hurt and tired and probably want to give up.*)

**How does the setting suddenly change in this section?** (*The crowd is going absolutely wild and crazy, and suddenly they become absolutely silent. They are stunned by the savage fight and the way the boys keep fighting even after the bell rings, signifying the end of the fight.*)

**Why do such good friends keep fighting after the bell rings?** (During the intense competition, each boy is focused on his desire to win. They both forget everything else during the match, including their friendship.)

**We predicted the theme might have something to do with competition or winning. As the competition ends, Felix and Antonio are both described as champions, yet only one is the winner. What is the difference between a champion and a winner?** (*A champion is someone who performs with skill and determination, who puts forth his or her best effort. The winner is the one the judges decide has done the best job. While there can only be one winner of the fight, both Felix and Antonio have competed like champions because they gave it all they had.*)

**What message about life does the author want us to understand?** (*Possible answers: Friendship is more important than winning. Friends must work hard to compete and maintain their friendship.*)

		<p><b>Closing the Loop:</b></p> <ul style="list-style-type: none"> <li>After all of the tension and buildup and savage boxing, neither boy achieves a knockout of the other. The referees must decide the winner based on the fighting, not by a clear knockout. The boys are so into the fighting that they forget their friendship and the crowd and even the referees and rules of the game, and they continue fighting after the fight is over. Their trainers have to pull them apart. They lunch at each other as if to keep fighting, but they end up embracing, or hugging each other, which is a surprising end to such a brutal fight. They end up walking out of the ring, arm in arm, because they are both champions. They don't even hear the announcer announce the winner chosen by the referees.</li> </ul>
<b>After Reading</b>		
10 min.	Independent Practice: Text Analysis Worksheet	<p><b>[Direct students get out their text analysis worksheet from yesterday.]</b></p> <p><b>Say:</b> Now that we've read through the rest of this story, you will have an opportunity to go back through and review the clues about theme from the characters, setting, and conflict. Then, we can determine a theme for the entire story, using the clues.</p> <p><b>Say:</b> Fill in the chart with more clues that identify the theme of the story and write what you think the theme is based on the clues. Then answer the question that follows. <b>[Circulate to check on student work, coach, and provide feedback.]</b></p>
2 min.	Closing	<p><b>Say:</b> Wow! You did awesome job practicing our skill today! We will continue working on this tomorrow.</p> <p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>What skill are we working on this week? (<i>analyzing the influence that the setting of a narrative has on the theme of the narrative</i>)</li> <li>What is theme? (<i>the message the author wants the reader to understand about life</i>)</li> <li>What is setting? (<i>where and when the story takes place</i>)</li> <li>How will we analyze the influence that the setting has on the theme? (<i>First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, "What message about life does the author want us to understand?" and "How did the setting influence that message?"</i>)</li> <li>Why do we do this as good readers? (<i>Good readers analyze how the setting influences the theme in order to better understand the author's message about life.</i>)</li> </ul>

Time Stamps		Day 4 – Close Read
Unit/Selection	Unit 3- “Amigo Brothers”	
Standard	RL.7.2 RL.7.3	
Skill Focus	Analyze Influence of Setting on Theme	
I Can Statement	I can analyze the influence that the setting of a narrative has on the theme of the narrative.	
Before Reading		
2 min.	Skill Focus Check for Understanding	<p><b>Say:</b> Today, we will continue practicing the skill we’ve been working on this week.</p> <p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>• What skill are we working on this week? (<i>analyzing the influence that the setting of a narrative has on the theme of the narrative</i>)</li> <li>• What is theme? (<i>the message the author wants the reader to understand about life</i>)</li> <li>• What is setting? (<i>where and when the story takes place</i>)</li> <li>• How will we analyze the influence that the setting has on the theme? (<i>First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, “What message about life does the author want us to understand?” and “How did the setting influence that message?”</i>)</li> <li>• Why do we do this as good readers? (<i>Good readers analyze how the setting influences the theme in order to better understand the author’s message about life.</i>)</li> </ul>
During Reading		
1 min.	Close Read – Set Purpose	<b>Say:</b> We’re going to look back at “Amigo Brothers” to review the ways that setting influences theme.
15 min.	Skill-Aligned Question and Discussion	<p><b>[Direct students to open interactive reader or textbook to “Amigo Brothers.”]</b></p> <p><b>Say:</b> Let’s review a few questions about setting and theme.</p> <p><b>Let’s think first about the topics in this story. What does the title of the story tell you about Felix and Antonio’s friendship?</b> (<i>They were such good friends that they felt like brothers.</i>)</p> <p><b>How do the boys’ similarities contribute to their friendship?</b> (<i>Because they come from the same background and both enjoy boxing, they have a lot in common. They can spend time together working out and talking about boxing, and each understands what the other goes through.</i>)</p> <p><b>Why does Antonio try to convince himself that fighting is like any other profession?</b> (<i>He wants to believe that he can set his friendship aside when he’s in the ring with Felix.</i>)</p>

		<p><b>The people in the neighborhood are intensely interested in the fight between Felix and Antonio. How might this interest affect the two fighters?</b> <i>(The neighborhood interest might put extra pressure on the fighters to do well in the competition and not let their supporters down.)</i></p> <p><b>Describe how the end of the story reflects the theme.</b> <i>(The end of the story shows that friendship is more important than who won the fight.)</i></p> <p><b>How does Felix and Antonio’s decision to avoid seeing each other before the fight help them to keep their friendship intact?</b> <i>(The separation allows them to mentally prepare to enter the ring as opponents rather than close friends. At the same time, they make a commitment to come together afterward as if nothing had happened.)</i></p> <p><b>Say:</b> Now you will work with a partner to determine what you think is the theme of this text and how the setting influenced the theme.</p> <p><b>[distribute Close Reading worksheet] Say:</b> With your partner, determine what you think is the main theme of the story. Remember, theme is a message about life the author wants you to understand. Then, find three pieces of text evidence that show how the setting of “Amigo Brothers” helped create the theme you chose. <b>[Give students 12-15 minutes to work with a partner on this task. Circulate to provide feedback and coaching.]</b></p>
<b>After Reading</b>		
30 min.	Independent Practice – Constructed Response	<p><b>Say:</b> Now that we’ve reviewed some key parts of the text, you will write a constructed response about the theme and setting of “Amigo Brothers.” <b>[Provide response time and circulate to provide feedback.]</b></p> <p><b>How is the setting important to the theme of “Amigo Brothers”? Use examples from the story to support your response.</b></p>
2 min.	Closing	<p><b>Say:</b> Fantastic work practicing our skill of analyzing how setting influences theme!</p> <p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>• What skill are we working on this week? <i>(analyzing the influence that the setting of a narrative has on the theme of the narrative)</i></li> <li>• What is theme? <i>(the message the author wants the reader to understand about life)</i></li> <li>• What is setting? <i>(where and when the story takes place)</i></li> <li>• How will we analyze the influence that the setting has on the theme? <i>(First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, “What message about life does the author want us to understand?” and “How did the setting influence that message?”)</i></li> <li>• Why do we do this as good readers? <i>(Good readers analyze how the setting influences the theme in order to better understand the author’s message about life.)</i></li> </ul>

Time Stamps	Day 5 – Skill Review (Workshop) and Formative Assessment	
Text for Teacher-Led Small Group	“After Twenty Years” (attached)	
Standard	RL.7.2 RL.7.3	
Skill Focus	Analyze Influence of Setting on Theme	
I Can Statement	I can analyze the influence that the setting of a narrative has on the theme of the narrative.	
Introduction		
5 min	Set the Stage	<p><b>[Display student groups on projector with Do Now.]</b></p> <p><b>Say:</b> Remember, today is workshop day! You will rotate to three different centers. Our three workshop groups will be a teacher-led group with me at the table, an assessment/independent reading group at their desks, and an independent work group at their desks. When you walked in, you saw the group you are starting in. Let’s review how to transition between our workshop groups.</p> <p><b>[Refer to anchor chart.] Say:</b> Remember, my expectations for this transition are:</p> <ol style="list-style-type: none"> <li>1- Stand up quietly, push in your chair, walk to the table</li> <li>2- Bring a pencil and your materials</li> <li>3- Sit at your seat at a level zero</li> </ol> <p>If you are not in the group that is transitioning, remain at a level zero in your seat.</p> <p><b>[Refer to anchor chart.]</b> Remember, when your group is working on the assessment and independent reading, my expectations for you are:</p> <ol style="list-style-type: none"> <li>1- Reading material is at your desk</li> <li>2- Work at a level zero</li> <li>3- Complete assessment and turn it in before beginning reading</li> <li>4- Stay in your assigned seat</li> </ol> <p>Remember, when your group is working on the independent work, my expectations for you are:</p> <ol style="list-style-type: none"> <li>1- Work at a level zero</li> <li>2- Wear headphones when on a computer</li> <li>3- Stay in your seat</li> <li>4- Complete all assigned tasks</li> </ol> <p><b>Say:</b> Let’s go over what we will complete in our groups today.</p> <ul style="list-style-type: none"> <li>• In the teacher-led group, we will review our comprehension focus skill from last week while reading a new text. Our objective for this time together is “I can analyze the influence that the setting of a narrative has on the theme of the narrative.”</li> <li>• In the assessment group, you will be assessed on your understanding of stages of plot, and then you will read your independent novel. Our objective for this time together is, “I can analyze the influence that the setting of a narrative has on the theme of the narrative.”</li> <li>• In the independent work group, you will have the opportunity to complete a computer-based activity and then answer questions from</li> </ul>

		your interactive reader. Your objective for independent time is <b>[insert objective]</b>
<b>Workshop</b>		
<b>Teacher-Led Small Group</b>		
1 min.	Introduce Text	<b>Say:</b> This week, we learned how to analyze the influence that the setting of a narrative has on the theme of the narrative.
0 min.	Background Knowledge	<b>Say:</b> The author of this story, William Sydney Porter (1862-1910), was an American writer better known by his pen name, O. Henry. "After Twenty Years," published in 1908, is one of his better known short stories that shows how complicated friendship can be.
4 min.	Explicit Selection Vocabulary Instruction (when appropriate)	<p><b>Words to Teach:</b></p> <ul style="list-style-type: none"> <li>• <u>spectator</u>: someone who looks on or watches (a performance or other public event)</li> <li>• <u>proposition</u>: something (such as a plan or offer) that is presented to a person or group of people to consider</li> <li>• <u>dismal</u>: showing or causing sadness; very bad or poor</li> <li>• <u>simultaneously</u>: happening at the same time</li> </ul> <p><b>Say:</b> In today's texts, we have a few words that you may not be familiar with. Let's learn them together to help us understand the text.</p> <p>The word is <b>spectator</b>. What's the word? A <b>spectator</b> is someone who looks on or watches (a performance or other public event). What is a <b>spectator</b>? Turn to a partner and use <b>spectator</b> in a sentence.</p> <p><b>[repeat process for remaining words]</b></p>
1 min.	Skill Focus Check for Understanding	<p><b>Say:</b> Let's review how to analyze the influence that the setting of a narrative has on the theme of the narrative.</p> <p><b>This Week's Skill [revisit anchor chart]:</b></p> <ul style="list-style-type: none"> <li>• What skill are we working on this week? (<i>analyzing the influence that the setting of a narrative has on the theme of the narrative</i>)</li> <li>• What is theme? (<i>the message the author wants the reader to understand about life</i>)</li> <li>• What is setting? (<i>where and when the story takes place</i>)</li> <li>• How will we analyze the influence that the setting has on the theme? (<i>First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, "What message about life does the author want us to understand?" and "How did the setting influence that message?"</i>)</li> <li>• Why do we do this as good readers? (<i>Good readers analyze how the setting influences the theme in order to better understand the author's message about life.</i>)</li> </ul>

1 min.	Set the Purpose for Reading	<p><b>Say:</b> I will start reading while you follow along. As we read, we will practice looking for details about the setting and thinking about how the setting affects the characters' thoughts and actions. Finally, we will determine the theme and think about how the setting affects the theme.</p>
12 min.	Guided Skill-Aligned Comprehension Questions	<p><b>[Read the text using a variety of teacher read aloud, independent reading, or partner reading.]</b></p> <p><b>[after reading paragraph 2] What details can you find about the setting?</b> <i>(It's 10 pm at night, there are "few spectators", so the streets are nearly empty, it's chilly, windy, and rainy, there is little crime in this area and people go to bed early)</i></p> <p><b>[after reading paragraph 5] How does the setting affect the characters' thoughts and actions?</b> <i>(The policeman is trying doors, to see if they are unlocked and walking through the street, patrolling to ensure everything is safe and under control. The man in the doorway feels the need to explain himself to the policeman since he is waiting in a dark alley at night, which could be perceived as suspicious.)</i></p> <p><b>[after reading paragraph 17] How does the setting affect the characters' thoughts and actions?</b> <i>(The man in the doorway is waiting for his friend, Jimmy. He and Jimmy grew up together in New York City and then separated. They vowed to meet again in twenty years right at this spot. The waiting man went out West where he made a lot of money, as evidenced by his diamond watch.)</i></p> <p><b>[after reading paragraph 33] What is the climax of the story?</b> <i>(The reader finds out that Bob is actually a wanted criminal. Bob realizes that the person he thinks is his friend Jimmy is actually a police officer, and he is under arrest.)</i></p> <p><b>How did the plainclothes officer know that Bob was a wanted criminal?</b> <i>(The first policeman who spoke to Bob was actually Jimmy. Jimmy took a look at Bob and knew he was a criminal. He was Bob's friend, so he didn't want to arrest him himself. He asked a plainclothes police officer to make the arrest.)</i></p> <p><b>How did the setting contribute to the climax of the story?</b> <i>(It was a dark night, so Bob couldn't clearly see Jimmy the policeman and didn't recognize him. Also because it was dark, Jimmy couldn't clearly see Bob until he lit a match to light his cigar. When he lit the match, he realized that Bob was a wanted criminal and knew he had to turn him in. Similarly, in the darkness, Bob couldn't tell that the plainclothes police officer wasn't his friend until it was too late. The light and darkness play significant roles in the setting of this story.)</i></p> <p><b>What are some possible themes for this story?</b> <i>(Friendship is complicated; The decision between loyalty and doing what is right is a hard one to make; Justice is more important than loyalty)</i></p> <p><b>How did the setting contribute to the theme?</b> <i>(The various patterns of light and darkness symbolize the differences between the two friends- one is light</i></p>

		<i>(Jimmy) and the other is a dark criminal (Bob). The setting of a dark, sinister, cold &amp; rainy night also set up the theme that a complicated decision would be made between right and wrong.)</i>
5 min.	Independent Practice	<b>Say:</b> On the back of your story, write what you believe is the main theme of this story. Then, find three pieces of text evidence that show how the setting influenced the theme. <b>[Check student work and coach as they select a theme and text evidence.]</b>
1 min.	Closing	<p><b>Say:</b> Excellent work practicing our skill today!</p> <p><b>Check for Understanding:</b></p> <ul style="list-style-type: none"> <li>• What skill are we working on this week? <i>(analyzing the influence that the setting of a narrative has on the theme of the narrative)</i></li> <li>• What is theme? <i>(the message the author wants the reader to understand about life)</i></li> <li>• What is setting? <i>(where and when the story takes place)</i></li> <li>• How will we analyze the influence that the setting has on the theme? <i>(First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, "What message about life does the author want us to understand?" and "How did the setting influence that message?")</i></li> <li>• Why do we do this as good readers? <i>(Good readers analyze how the setting influences the theme in order to better understand the author's message about life.)</i></li> </ul>
<b>Assessment/Independent Reading Station</b>		
25 min.	Comprehension Skill Assessed	<ul style="list-style-type: none"> <li>• Analyze Influence of Setting on Theme</li> </ul>
<b>Independent Work Station</b>		
25 min.	Independent Activities	<ul style="list-style-type: none"> <li>• Computer- setting, theme</li> <li>• Teacher-chosen activity</li> </ul>
<b>Closing</b>		
10 min.	Self-Reflection	<p><b>[Have all students return to their seats.]</b></p> <p><b>Say:</b> At the end of every workshop, we will self-reflect on our work for the day. Once you receive a reflection sheet, you will rate yourself on your work around the objectives for the day. Then you will provide evidence to support your rating. On the way out of class, you will give me your self-reflection as your ticket out the door.</p>

Name: \_\_\_\_\_ Class: \_\_\_\_\_

## After Twenty Years

By O. Henry  
1905

*William Sydney Porter (1862-1910) was an American writer better known by his pen name, O. Henry. "After Twenty Years," published in 1908, is one of his better known short stories that shows how complicated friendship can be.*

*As you read, take notes on the imagery used in the story.*

- [1] The policeman on the beat moved up the avenue impressively. The impressiveness was habitual and not for show, for spectators<sup>1</sup> were few. The time was barely 10 o'clock at night, but chilly gusts of wind with a taste of rain in them had well nigh depeopled the streets.

Trying doors as he went, twirling his club with many intricate and artful movements, turning now and then to cast his watchful eye adown the pacific thoroughfare, the officer, with his stalwart form and slight swagger, made a fine picture of a guardian of the peace. The vicinity was one that kept early hours. Now and then you might see the lights of a cigar store or of an all-night lunch counter; but the majority of the doors belonged to business places that had long since been closed.

When about midway of a certain block the policeman suddenly slowed his walk. In the doorway of a darkened hardware store a man leaned, with an unlighted cigar in his mouth. As the policeman walked up to him the man spoke up quickly.

"It's all right, officer," he said, reassuringly. "I'm just waiting for a friend. It's an appointment made twenty years ago. Sounds a little funny to you, doesn't it? Well, I'll explain if you'd like to make certain it's all straight. About that long ago there used to be a restaurant where this store stands — 'Big Joe' Brady's restaurant."



*"Night Walk" by Matthias Ripp is licensed under CC BY 2.0*

- [5] "Until five years ago," said the policeman. "It was torn down then."

1. **Spectator (noun):** someone who looks on or watches (a performance or other public event)

The man in the doorway struck a match and lit his cigar. The light showed a pale, square-jawed face with keen eyes, and a little white scar near his right eyebrow. His scarfpin was a large diamond, oddly set.

"Twenty years ago to-night," said the man, "I dined here at 'Big Joe' Brady's with Jimmy Wells, my best chum, and the finest chap in the world. He and I were raised here in New York, just like two brothers, together. I was eighteen and Jimmy was twenty. The next morning I was to start for the West to make my fortune. You couldn't have dragged Jimmy out of New York; he thought it was the only place on earth. Well, we agreed that night that we would meet here again exactly twenty years from that date and time, no matter what our conditions might be or from what distance we might have to come. We figured that in twenty years each of us ought to have our destiny worked out and our fortunes made, whatever they were going to be."

"It sounds pretty interesting," said the policeman. "Rather a long time between meets, though, it seems to me. Haven't you heard from your friend since you left?"

"Well, yes, for a time we corresponded," said the other. "But after a year or two we lost track of each other. You see, the West is a pretty big proposition,<sup>2</sup> and I kept hustling around over it pretty lively. But I know Jimmy will meet me here if he's alive, for he always was the truest, staunchest<sup>3</sup> old chap in the world. He'll never forget. I came a thousand miles to stand in this door to-night, and it's worth it if my old partner turns up."

[10] The waiting man pulled out a handsome watch, the lids of it set with small diamonds.

"Three minutes to ten," he announced. "It was exactly ten o'clock when we parted here at the restaurant door."

"Did pretty well out West, didn't you?" asked the policeman.

"You bet! I hope Jimmy has done half as well. He was a kind of plodder,<sup>4</sup> though, good fellow as he was. I've had to compete with some of the sharpest wits going to get my pile. A man gets in a groove in New York. It takes the West to put a razor-edge on him."

The policeman twirled his club and took a step or two.

[15] "I'll be on my way. Hope your friend comes around all right. Going to call time on him sharp?"

"I should say not!" said the other. "I'll give him half an hour at least. If Jimmy is alive on earth he'll be here by that time. So long, officer."

"Good-night, sir," said the policeman, passing on along his beat, trying doors as he went.

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2. **Proposition (noun):** something (such as a plan or offer) that is presented to a person or group of people to consider
  3. Perhaps a form of "staunch," meaning of strong construction or conviction.
  4. a person who works in a slow, uninspired manner; a person who plods

There was now a fine, cold drizzle falling, and the wind had risen from its uncertain puffs into a steady blow. The few foot passengers astir in that quarter hurried <sup>5</sup> and silently along with coat collars turned high and pocketed hands. And in the door of the hardware store the man who had come a thousand miles to fill an appointment, uncertain almost to absurdity, with the friend of his youth, smoked his cigar and waited.

About twenty minutes he waited, and then a tall man in a long overcoat, with collar turned up to his ears, hurried across from the opposite side of the street. He went directly to the waiting man.

[20] "Is that you, Bob?" he asked, doubtfully.

"Is that you, Jimmy Wells?" cried the man in the door.

"Bless my heart!" exclaimed the new arrival, grasping both the other's hands with his own. "It's Bob, sure as fate. I was certain I'd find you here if you were still in existence. Well, well, well! — twenty years is a long time. The old restaurant's gone, Bob; I wish it had lasted, so we could have had another dinner there. How has the West treated you, old man?"

"Bully; it has given me everything I asked it for. You've changed lots, Jimmy. I never thought you were so tall by two or three inches."

"Oh, I grew a bit after I was twenty."

[25] "Doing well in New York, Jimmy?"

"Moderately. I have a position in one of the city departments. Come on, Bob; we'll go around to a place I know of, and have a good long talk about old times."

The two men started up the street, arm in arm. The man from the West, his egotism enlarged by success, was beginning to outline the history of his career. The other, submerged in his overcoat, listened with interest.

At the corner stood a drug store, brilliant with electric lights. When they came into this glare each of them turned simultaneously<sup>6</sup> to gaze upon the other's face.

The man from the West stopped suddenly and released his arm.

[30] "You're not Jimmy Wells," he snapped. "Twenty years is a long time, but not long enough to change a man's nose from a Roman to a pug."

"It sometimes changes a good man into a bad one," said the tall man. "You've been under arrest for ten minutes, 'Silky' Bob. Chicago thinks you may have dropped over our way and wires us she wants to have a chat with you. Going quietly, are you? That's sensible. Now, before we go on to the station here's a note I was asked to hand you. You may read it here at the window. It's from Patrolman Wells."

5. **Dismal** (*adjective*): showing or causing sadness; very bad or poor

6. **Simultaneously** (*adverb*): happening at the same time



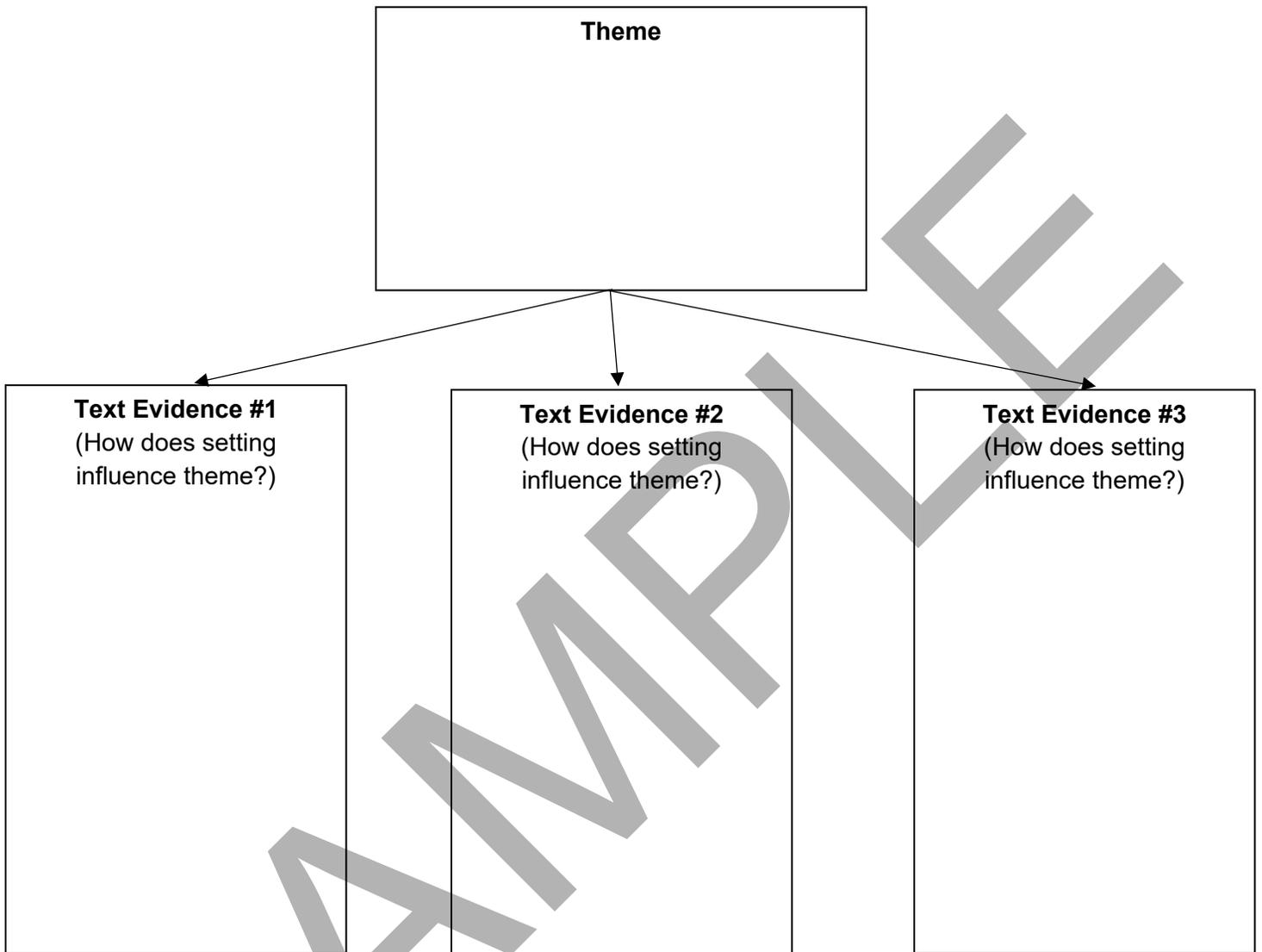
The man from the West unfolded the little piece of paper handed him. His hand was steady when he began to read, but it trembled a little by the time he had finished. The note was rather short.

"Bob: I was at the appointed place on time. When you struck the match to light your cigar I saw it was the face of the man wanted in Chicago. Somehow I couldn't do it myself, so I went around and got a plain clothes man to do the job. JIMMY."

*"After Twenty Years" by O. Henry (1905) is in the public domain.*

SAMPLE

### Close Reading- "Amigo Brothers"



Name: \_\_\_\_\_ Date: \_\_\_\_\_

### Workshop Self-Reflection

Please fill in your comprehension skill objective for the week and rate yourself on how well you understand it on a scale of 1 (I don't understand it at all) to 5 (I completely understand it).

Objectives:

Skill of the Week – I can \_\_\_\_\_

Rate: 1 2 3 4 5

Evidence to support your rating: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What do you need to continue practicing? \_\_\_\_\_

\_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

### Workshop Self-Reflection

Please fill in your comprehension skill objective for the week and rate yourself on how well you understand it on a scale of 1 (I don't understand it at all) to 5 (I completely understand it).

Objectives:

Skill of the Week – I can \_\_\_\_\_

Rate: 1 2 3 4 5

Evidence to support your rating: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What do you need to continue practicing? \_\_\_\_\_

\_\_\_\_\_

### Formative Assessment Data Monitoring

Fill in the table below with student names based on the scores from this week's comprehension quiz. Use this data to organize your three workshop groups for the following Friday.

This week's assessed comprehension skill: \_\_\_\_\_

<b>3.0</b> <b>100%</b>	<b>2.5-2.0</b> <b>75-50%</b>	<b>1.5-0.5</b> <b>below 25%</b>

# Sample Math Lesson Plans

<b>Kindergarten Unit 1 – Introducing Counting</b>					
	<b>Day 1</b>	<b>Day 2</b>	<b>Day 3</b>	<b>Day 4</b>	<b>Day 5</b>
<b>Math Routines</b> 10 minutes	Which One Doesn't Belong	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines
<b>Math Stories</b> 20 minutes	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives
<b>Math Lesson</b> 30 minutes	<b>Lesson 1, Activity 1</b> TE p. 2 See Math in Real-World Pictures	<b>Lesson 1, Activity 2</b> TE p. 3-5 Quick Practice Routines	<b>Lesson 2, Activity 1</b> TE p. 8-9 Counting Mat Activities for Numbers 1-5 (work with Numbers 3 and 4)	<b>Lesson 2, Activity 1</b> TE p. 8-9 Counting Mat Activities for Numbers 1-5 (work with Numbers 2, 5, and 1)	<b>Lesson 3</b> TE p. 12-13 Revisit <i>Anno's Counting Book</i> Draw scenes 2 and 3
	<b>Day 6</b>	<b>Day 7</b>	<b>Day 8</b>	<b>Day 9</b>	<b>Day 10</b>
<b>Math Routines</b> 10 minutes	Which One Doesn't Belong	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines
<b>Math Stories</b> 20 minutes	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives
<b>Math Lesson</b> 30 minutes	<b>Lesson 4, Activity 1 &amp; 2</b> TE p. 16-17 Discuss Scenes and Images Counting Mat Activities (work with Numbers 2 and 3)  <i>*Activity 3 can be incorporated as a Quick Practice routine option</i>	<b>Lesson 5</b> TE p. 20-21 Counting Mat Activities (work with Numbers 4 and 5) Draw scenes 4 and 5	<b>Lesson 6, Activity 1</b> TE p. 24-25 Discussing scenes and creating visual images  <i>*Activity 2 student book page can be used as homework or additional practice</i>	<b>Lesson 7, Activity 1</b> TE p. 30-31 Counting Mat Activities (only include Steps 1-8)	<b>Lesson 9</b> TE p. 40-43 Counting Mat Activities (only include Steps 1-8 and Compare) (work with Numbers 3 and 5)
	<b>Day 11</b>	<b>Day 12</b>	<b>Day 13</b>	<b>Day 14</b>	<b>Day 15</b>
<b>Math Routines</b> 10 minutes	Which One Doesn't Belong	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines
<b>Math Stories</b> 20 minutes	Grab & Count	Grab & Count	Grab & Count	Grab & Count	Grab & Count
<b>Math Lesson</b> 30 minutes	<b>Lesson 8, Activity 1</b> TE p. 34 Describe Circles	<b>Lesson 8, Activity 2</b> TE p. 35 Draw Circles	<b>Lesson 10, Activity 1</b> TE p. 46-47 Attributes of Rectangles	<b>Lesson 10, Activity 2</b> TE p. 48-49 Describe Squares	<b>Lesson 10, Activity 3</b> TE p. 50-53 Classify Shapes

<b>Kindergarten Unit 1 – Introducing Counting</b>					
	<b>Day 16</b>	<b>Day 17</b>	<b>Day 18</b>	<b>Day 19</b>	<b>Day 20</b>
<b>Math Routines</b> 10 minutes	Which One Doesn't Belong	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines
<b>Math Stories</b> 20 minutes	Grab & Count	Grab & Count	Grab & Count	Grab & Count	Grab & Count
<b>Math Lesson</b> 30 minutes	<b>Lesson 11, Act. 1 &amp; 2</b> TE p. 56-57 Discussing <i>Anno's Counting Book</i> Counting Mat Activities (work with Numbers 6-10) <i>*Activity 3 can be incorporated as a Quick Practice routine option</i>	<b>Lesson 12, Activity 1</b> TE p. 60 Counting Mat Activities (work with Numbers 6-10)	<b>Lesson 12, Activity 2</b> TE p. 61-63 Write the Numbers 1, 2, and 3	<b>Lesson 13, Activity 1</b> TE p. 66 Counting Mat Activities Numbers 1-10	<b>Lesson 13, Activity 2</b> TE p. 67 Seeing Quantities in Groups
	<b>Day 21</b>	<b>Day 22</b>	<b>Day 23</b>	<b>Day 24</b>	<b>Day 25</b>
<b>Math Routines</b> 10 minutes	Which One Doesn't Belong	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines
<b>Math Stories</b> 20 minutes	Grab & Count	Grab & Count	Grab & Count	Grab & Count	Grab & Count
<b>Math Lesson</b> 30 minutes	<b>Lesson 14, Activity 1</b> TE p. 70-72 Write, Draw, and Count with the Number 4	<b>Lesson 15, Activity 1</b> TE p. 78 Counting Mat Activities 1-10	<b>Lesson 15, Activity 2</b> TE p. 79 See Different Sized Groups	<b>Lesson 16, Act. 1 &amp; 2</b> TE p. 82-84 Writing the Number 5 & Extra Practice	<b>Lesson 17, Activity 1</b> TE p. 88 Counting Mat Activities (Numbers 6-10)
	<b>Day 26</b>	<b>Day 27</b>	<b>Day 28</b>	<b>Day 29</b>	<b>Day 30</b>
<b>Math Routines</b> 10 minutes	Which One Doesn't Belong	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines
<b>Math Stories</b> 20 minutes	Grab & Count	Grab & Count	Grab & Count	<b>Unit Assessment</b>	<b>Unit Assessment</b>
<b>Math Lesson</b> 30 minutes	<b>Lesson 17, Activity 2</b> TE p. 88-89 Learn to Make Dot-to-Dot Pictures	<b>Lesson 18, Activity 1</b> TE p. 92-93 Math and the Museum	<b>Lesson 18, Act. 2 &amp; 3</b> TE p. 94-95 Make a Model/Use Reasoning & Establish a Position		

<b>Math Background – Unit 1</b>																											
<b>Standard</b>	<b>Standard for Mathematical Practice 5:</b> Use appropriately tools strategically.																										
<b>Days 1 – 10</b>																											
<b>Problem Type</b>	Exploring Manipulatives																										
<b>Math Background</b>	<p>The focus during the first two weeks of this unit is to introduce students to math manipulatives they will be using for more structured math activities throughout the year. When encountering new manipulatives, students need time to explore and play in order to construct ideas of their features. It is very common to see students dive into these materials without any guidance, and to see mathematical thinking and vocabulary naturally emerge.</p> <p>For example, when exploring connecting cubes, young children will often build towers or trains and discuss measurement concepts such as length or height. Children working with different colored tiles or pattern blocks may create patterns or build geometric shapes. Exploring manipulatives builds the foundation for Mathematical Practice 5 – Use appropriate tools strategically.</p> <p>This exploration time is also a critical time for the classroom teacher to be able to set expectations for manipulatives use, prior to bringing them into a more structured task. It is important to explicitly teach boundaries for manipulatives (e.g., not throwing, keeping them in a specified space) and procedures, such as passing out and cleaning up.</p> <p>Almost anything can be used as a math manipulative. There should be a variety of at least 8-10 different manipulatives readily accessible to students. The following list includes both materials that can be purchased from educational companies or recycled/repurposed from other materials.</p> <table border="1" data-bbox="479 1045 1360 1497"> <tbody> <tr> <td>Two-colored counters</td> <td>Beans</td> </tr> <tr> <td>Buttons</td> <td>Pasta</td> </tr> <tr> <td>Connecting cubes</td> <td>Beads</td> </tr> <tr> <td>1-inch tiles</td> <td>Clothespins</td> </tr> <tr> <td>Pennies</td> <td>Popsicle sticks</td> </tr> <tr> <td>Plastic bears, insects, fruit, etc.</td> <td>Toothpicks</td> </tr> <tr> <td>Plastic links</td> <td>Bottle caps</td> </tr> <tr> <td>Pattern blocks</td> <td>Marshmallows</td> </tr> <tr> <td>Small snack crackers</td> <td>Baby food pouch caps</td> </tr> <tr> <td>Cotton balls</td> <td>Craft pom-poms</td> </tr> <tr> <td>Small hair clips</td> <td>Large paper clips</td> </tr> <tr> <td>Googly eyes</td> <td>Bingo chips</td> </tr> <tr> <td>Nuts and bolts</td> <td>Packing peanuts</td> </tr> </tbody> </table>	Two-colored counters	Beans	Buttons	Pasta	Connecting cubes	Beads	1-inch tiles	Clothespins	Pennies	Popsicle sticks	Plastic bears, insects, fruit, etc.	Toothpicks	Plastic links	Bottle caps	Pattern blocks	Marshmallows	Small snack crackers	Baby food pouch caps	Cotton balls	Craft pom-poms	Small hair clips	Large paper clips	Googly eyes	Bingo chips	Nuts and bolts	Packing peanuts
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<b>I Can Statement(s)</b>	<p>I can use math tools (manipulatives) appropriately.</p> <p>I can explain how I use math tools.</p>																										
<b>Discussion</b>	<p>The discussion of exploring manipulatives is an opportunity for students to gain practice explaining their work and ideas as well as an opportunity for the teacher to establish norms and procedures for what a class math discussion should look and sound like.</p>																										

## Exploring Manipulatives Structure

### Preparation

- Determine which manipulatives will be used each day.  
*Suggestion: Have one bin of manipulatives per small group each day.*
- Determine how manipulatives will be distributed.  
*Examples:*
  - Have bins (with lids) on tables prior to beginning with Exploring Manipulatives.
  - Designate one student from each table to get a bin from a central storage location.
- Determine how student movement will be structured during exploration.  
*Examples:*
  - One bin of manipulatives at each table/group and students stay at table.
  - Manipulatives set up at stations and students are able to move freely. It may be helpful to provide a limit on how many students may be at a station.

### Engage

*This portion must be done at least the first day of each week. It can be done daily to open the activity.*

 **2-3 minutes**

**1**

Show either the collection of manipulatives, or a projected image of the manipulatives, the class will be working with (see *example below*).



**Look at these groups of objects [or pictures]. I want you to take 15 seconds to think about what you notice and what you wonder.**

**2**

Use a **Think-Pair-Share** structure (see *Best Practices*) to have students share:



**Share with your partner what you notice and wonder about the picture.**

**3**

Use an attention signal to bring students back to the whole group. Have 4-5 students share out. Accept any and all responses, this will validate student thinking.



## Best Practices

- It is suggested that students be seated in a carpet area for this part of the routine. This will create an engaging and comfortable setting for students to discuss ideas.
- Preplan a structure for the **Think-Pair-Share** and be very explicit with the directions.  
*Example: (After giving think time...)*



**Turn to your partner to share what you noticed. The partner who [has the most letters in their name] will go first. You will have [20 seconds] to share, I will tell you when to switch. Go!**

## Introducing the Activity

10-12 minutes

**1**



*[On Day 1]*

**We are going to use lots of different math tools to help solve math problems and play math games. These math tools are called manipulatives. You are going to have some time to explore many different manipulatives over the next two weeks.**

*[Each day]*



**When you go back to your table/desks, you are going to spend some time exploring your manipulative for today. I want you to see what you can do with them.**

**2**

*[On Day 1]*

Set very clear expectations regarding appropriate student behavior for interacting with manipulatives and create an anchor chart that can be referenced the rest of the year.



**Remember I told you that these are math tools, which means that they are important and we want to take good care of them. Take 15 seconds and think about what are some things we should remember when we are using our tools for math.**

A Think-Pair-Share structure can be used before having students share out .  
**Note:** This portion may take longer on Day 1 than other days during Exploring Manipulatives.

*[Each day]*



**You will have about 5-7 minutes when you get back to your seat to explore the manipulative that is at your table today. As you work, remember our expectations.**

*[Review the anchor chart created on Day 1]*

**3**

Set a time for 5-7 minutes. Circulate and observe students as they work. Keep questioning open-ended to get a sense of how children naturally try to interact with the manipulative.  
**Example: What have you found you are able to do with your connecting cubes?**

Identify 3-4 students who are working with different manipulatives that you will have share in the discussion.

**Discussion** **5-7 minutes****1**

Use an attention signal to bring students back to the whole group. Ask the 3-4 pre-determined students to share their manipulative and what they found they were able to do with it.

As each student shares, the teacher should restate his/her reasoning to affirm the student's thought process.

**Best Practices**

- Use the first few discussions to establish norms and procedures for what a class math discussion should look and sound like. Creating an anchor chart with these norms is recommended.
- It ***strongly recommended*** to have students who are sharing bring their manipulatives underneath the document camera. A tray or piece of cardstock can help with transferring objects from student's seat to the document camera.
- It is suggested that students be seated in a carpet area for this part of the routine. This will create an engaging and comfortable setting for students to discuss ideas.
- Ask another student to restate what was shared in his/her own words.
- Have students who used the same manipulative or were able to do something similar with theirs show a thumb up or use the sign language for "same" (see *video link below*).  
<https://www.youtube.com/watch?v=AFjifiTpc>

**Key Points** **2-3 minutes****1**

The teacher will make a connection from the students reasoning to applicable mathematical ideas.



Examples: ***"I noticed you were able to use the connecting cubes to measure how long your pencil was."*** or ***"I noticed you sorted the pasta pieces by color."***

**2**

Wrap-up the routine by articulating what students did today and how it connects to mathematics.



Example: ***"Scholars, today you explored manipulatives and found you were able to do a lot of different things with them. Good mathematicians use different tools, like these, to help them solve problems!"***

<b>Math Background – Unit 1</b>	
<b>Standards</b>	<p><b>K.CC.3</b> Write numbers from 0 to 20. Represent a number of objects with a written numeral 0-20 (with 0 representing a count of no objects).</p> <p><b>K.CC.4</b> Understand the relationship between numbers and quantities; connect counting to cardinality.</p> <ol style="list-style-type: none"> <li>When counting objects, say the number names in the standard order, pairing each object with one and only one number name and each number name with one and only one object. (<i>Ordered sequence of counting, One-to-one principle</i>)</li> <li>Understand that the last number name said tells the number of objects counted. The number of objects is the same regardless of their arrangement or the order in which they were counted. (<i>Cardinal principle</i>)</li> </ol>
<b>Days 11 – 28</b>	
<b>Problem Type</b>	Grab & Count
<b>Math Background</b>	<p>Weeks 3-6 introduce a purpose to using the manipulatives by having students engage in a counting activity referred to as <b>Grab &amp; Count</b>. The activity will have some slight variations from week to week:</p> <ul style="list-style-type: none"> <li>Week 3 – Students grab one handful of manipulatives and count.</li> <li>Week 4 – Students grab one handful, count, and record the number of items with a picture or numeral.</li> <li>Weeks 5 and 6 – Students grab two handfuls, count the total when both groups are put together, and record. This builds the foundation for solving problems that involve combining two groups together.</li> </ul> <p>Young children’s ability to count objects accurately, flexibly, and with understanding helps to ensure future success in math. Counting is the foundation for understanding our number system, and for much of the work students do with numbers and the operations of addition and subtraction throughout the primary grades. While counting may seem like a simple task, it is quite complex and requires a thorough understanding of the following principles:</p> <ul style="list-style-type: none"> <li><b>Ordered sequence of counting numbers:</b> Numbers are always assigned to items in a collection in the same order starting with one.</li> <li><b>One-to-one principle:</b> Exactly one number from the counting sequence is assigned to each item in the collection.</li> <li><b>Cardinal principle:</b> The last number in the counting sequence assigned to the collection represents the number of objects in the collection.</li> </ul> <p>The counting principles do not emerge or solidify in a set sequence. Some children may master the counting sequence prior to mastering the one-to-one principle, and vice versa. Having a variety of experiences with counting will help children in developing their understanding of quantity. As students are working on counting activities in this unit and continue with operations throughout the year, teacher observation and ongoing informal assessment are essential.</p>
<b>I Can Statement(s)</b>	<p>I can use math tools (manipulatives) appropriately.</p> <p>I can count objects and tell how many I counted.</p> <p>I can represent how many objects I counted with a picture or number.</p>
<b>Discussion</b>	At this point the discussion is still an opportunity for students to gain practice explaining their work and ideas as well as an opportunity for the teacher to establish norms and procedures for what a class math discussion should look and sound like.

	<p>Highlight students that use organization strategies, such as lining up objects or moving manipulatives to a separate group as they are counted, during the discussion.</p> <p>When students begin recording representations of the objects they have counted, ask questions to help students attach meaning to their picture or numbers. For example, “What do each of these [circles] represent?” if a student were to draw a circle for each connecting cube. Drawing attention to this connection between the concrete manipulative and pictorial representation will help students as they begin working with contextual problems later in the year.</p>
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## Grab & Count Structure

### Preparation

1. Determine which manipulatives will be used each day.  
*Suggestion: Have one bin of manipulatives per small group each day.*
2. Determine how manipulatives will be distributed.  
*Examples:*
  - Have bins (with lids) on tables prior to beginning Grab & Count.
  - Designate one student from each table to get a bin from a central storage location.
3. Determine how students will record/draw their set.  
*Examples:*
  - Counting Recording Page (provided as a blackline master)
  - Notebook

### Engage

 2-3 minutes

**1**

Choose a student to come up and hold his/her hand up for the class to see (*student could hold hand under document camera*). Also show students a different bin of manipulatives each day.



**Look at [student's name]'s hand and the [manipulatives]. I want you to take 15 seconds to think about what you notice and what you wonder.**

**2**

Use a **Think-Pair-Share** structure (see *Best Practices*) to have students share:



**Share with your partner what you notice and wonder about the picture.**

**3**

Use an attention signal to bring students back to the whole group. Have 4-5 students share out. Accept any and all responses, this will validate student thinking.

**4**

If students did not offer the following wonder “How many [manipulative] can [student] pick up?” suggest the following:



**I was wondering how many [manipulative] he/she could pick up in one\* handful.**

Use a **Think-Pair-Share** structure to have students discuss an estimate of how many the student might pick up in a handful and why. Use an attention signal to bring students back to the whole group. Have 2-3 students share out. Accept any and all responses, this will validate student thinking.

**\*Note: Beginning in Week 5, students will be picking up two handfuls.**



## Best Practices

- It is suggested that students be seated in a carpet area for this part of the routine. This will create an engaging and comfortable setting for students to discuss ideas.
- Preplan a structure for the **Think-Pair-Share** and be very explicit with the directions.

*Example: (After giving think time...)*



**Turn to your partner to share what you noticed. The partner who [has the most letters in their name] will go first. You will have [20 seconds] to share, I will tell you when to switch. Go!**

## Introducing the Activity

10-12 minutes

1

Have the student pick up one handful (two handfuls during Weeks 5 and 6) of the manipulatives and place in a pile under the document camera. Ask the student to count how many he/she pulled out in the handful.

2

Highlight one strategy the student used to help count accurately.



**Example: “I noticed you lined all of the connecting cubes up before you counted them and that helped keep your counting organized.”**

Have another student come up to count the manipulatives and highlight any additional strategy the student uses to help organize his/her count.

3

*[Beginning Week 4]*

On the first day of Week 4, introduce that students will also record how many they grabbed in their handfuls using a drawing and number.

Each day after having students count the manipulatives, ask a student to show under the document camera how they would represent the manipulatives with a drawing and number.

4

Set very clear expectations regarding appropriate student behavior for interacting with manipulatives and completing Grab & Count.



**You will have about 3-5 minutes when you get back to your seat to play Grab & Count. You will grab one\* handful of your manipulatives and count them. [Beginning Week 4: After you count, draw and record with a number how many you have]. When you finish counting them, put that group back and grab another handful to count. As you work, remember our expectations.**

*[Review the anchor chart created on Day 1]*

**\*Note: Beginning in Week 5, students will be picking up two handfuls.**

**5**

Set a timer for 3-5 minutes. Circulate and observe students as they work. Use the Observation Checklist while circulating to get a sense of which counting principles are evident.

*Note: It is not necessary to check in with every student each day, rather aim for 1-2 times per week at minimum. Grab & Count is intentionally repetitive in nature so that the teacher can have multiple touchpoints with each student over the course of the four weeks.*

Identify 2-3 students to share their counting and/or picture and number representation.



## Best Practices

- The size of the manipulative can be varied to differentiate based on students' counting ability. For example, a strong group of counters might be given small beans so they pick up more in their handfuls, while struggling counters might be given larger objects, such as connecting cubes, that they will pick up fewer in a handful.

## Discussion

**5-7 minutes**
**1**

Use an attention signal to bring students back to the whole group. Ask the 2-3 pre-determined students to share their counting and/or picture and number representation.

As each student shares, the teacher should highlight any strategy that helped organize the student's count. *Examples: Moving each connecting cube as it is counted, standing bears up as they are counted, etc.*



## Best Practices

- It **strongly recommended** to have students who are sharing bring their manipulatives and/or recording underneath the document camera. A tray or piece of cardstock can help with transferring objects from student's seat to the document camera.
- It is suggested that students be seated in a carpet area for this part of the routine. This will create an engaging and comfortable setting for students to discuss ideas.
- Ask another student to restate what was shared in his/her own words.

## Key Points

**2-3 minutes**
**1**

Wrap-up the routine by articulating what students did today and how it connects to mathematics.

Example: "**Scholars, today you used some strategies to help you keep your counting organized. If applicable: You also used pictures and numbers to represent the objects that you counted.**"

# THIRD GRADE MATH STORIES



## UNIT 2

National  
Heritage  
Academies® 

# THIRD GRADE UNIT 2

## The Relationship Between Multiplication & Division



### UNIT PLAN

During Unit 2 students will begin to explore the relationship between multiplication and division. Students will first see division problems as “missing factor” multiplication problems. Only then will the teacher make the connection between the “missing factor” multiplication problem and the concept of division. It is important to read the one-page math background at the beginning of each week in order to understand the WHY behind each week in this unit.

Week 4	Day 1	Day 2	Day 3	Day 4	Day 5
<b>Snap Facts Routine</b> 5 minutes	<i>Practice 1s and 2s</i>				
<b>Math Story</b> 30 Minutes	Math Story 2.1 Part 1: Fish Part 2: Cookies	Math Story 2.2 Part 1: Flowers Part 2: Crayons	Math Story 2.3 Cupcakes	Math Story 2.4 Marble Game	Math Story 2.5 Pencils
<b>Classroom-Based Instruction</b> 55 Minutes	READY Lesson 21 Solve Problems About Time Pg. 220-221	READY Lesson 21 Solve Problems About Time Pg. 222-223	READY Lesson 21 Solve Problems About Time Pg. 224-225	READY Lesson 21 Solve Problems About Time Pg. 226-227	READY Lesson 21 Solve Problems About Time Pg. 229  <b>Lesson 21 Quiz</b>
Week 5	Day 1	Day 2	Day 3	Day 4	Day 5
<b>Snap Facts Routine</b> 5 minutes	<i>Practice 1s and 2s</i>	<i>Practice 1s and 2s</i>	<i>Practice 1s and 2s</i>	<b>Progress Assessment 1s and 2s</b>	Math Story 2.10  <i>Make 5s Array Cards</i>
<b>Math Story</b> 30 Minutes	Math Story 2.6 The Band	Math Story 2.7 Tomato Plants	Math Story 2.8 Chocolates	Math Story 2.9 Soda	
<b>Classroom-Based Instruction</b> 55 Minutes	READY Lesson 22 Liquid Volume Pg. 230-233	READY Lesson 22 Liquid Volume Pg. 234-237	READY Lesson 23 Mass Pg. 240-243	READY Lesson 23 Mass Pg. 244-247	READY Lesson 23 Mass Pg. 248-249  <b>Lesson 22/23 Quiz</b>

Week 6	Day 1	Day 2	Day 3	Day 4	Day 5
<b>Snap Facts Routine</b> 5 minutes	<i>Practice 5s</i>	<i>Practice 5s</i>	<i>Practice 5s</i>	<b>Strategy Assessment</b> <b>1s, 2s, 5s</b>	<i>Practice 1s, 2s, 5s together</i>
<b>Math Story</b> 30 Minutes	Math Story 2.11 Road Trip	Math Story 2.12 Fabric	Math Story 2.13 New Year's Eve	Math Story 2.14 Art Project	Math Story 2.15 Ribbon
<b>Classroom-Based Instruction</b> 55 Minutes	READY Lesson 24 Solve Problems Using Scaled Graphs Pg. 250-251	READY Lesson 24 Solve Problems Using Scaled Graphs Pg. 252-255	READY Lesson 25 Draw Scaled Graphs Pg. 260-261	READY Lesson 25 Draw Scaled Graphs Pg. 262-263	READY Lesson 25 Draw Scaled Graphs Pg. 264-265  <b>Lesson 24/25 Quiz</b>
Week 7	Day 1	Day 2	Day 3	Day 4	Day 5
<b>Snap Facts Routine</b> 5 minutes	<i>Practice 1s, 2s, 5s together</i>	<i>Practice 1s, 2s, 5s together</i>	<i>Practice 1s, 2s, 5s together</i>	<b>Progress Assessment</b> <b>1s, 2s, and 5s</b>	Math Story 2.20  <i>Make 10s Array Cards</i>
<b>Math Story</b> 30 Minutes	Math Story 2.16 How Many Miles?	Math Story 2.17 Mr. Kohlberg's Flower Shop	Math Story 2.18 Straw Shapes	Math Story 2.19 School Play	
<b>Classroom-Based Instruction</b> 55 Minutes	READY Lesson 26 Measure Length and Plot Data on Line Plots Pg. 270-271	READY Lesson 26 Measure Length and Plot Data on Line Plots Pg. 272-273	READY Lesson 26 Measure Length and Plot Data on Line Plots Pg. 274-275	READY Lesson 26 Measure Length and Plot Data on Line Plots Pg. 276-277	READY Lesson 26 Measure Length and Plot Data on Line Plots Pg. 278-279  <b>Lesson 26 Quiz</b>
Week 8	Day 1	Day 2	Day 3	Day 4	Day 5
<b>Snap Facts Routine</b> 5 minutes	<i>Practice 10s</i>	<i>Practice 10s</i>	<i>Practice 10s</i>	<b>Strategy Assessment</b> <b>1s, 2s, 5s, and 10s</b>	<i>Practice 1s, 2s, 5s, 10s together</i>
<b>Math Story</b> 30 Minutes	Math Story 2.21 Stickers	Math Story 2.22 Cookies	Math Story 2.23 Boxes of Books	Math Story 2.24 Marbles	Math Story 2.25 Erasers
<b>Classroom-Based Instruction</b> 55 Minutes	There are no new READY lessons introduced this week <i>This time can be spent reviewing previously taught lessons/standards in preparation for the upcoming Interim or continuing on with lessons if they took longer throughout the weeks.</i>				



## STANDARDS

### 3.OA.1

Interpret products of whole numbers, e.g., interpret  $5 \times 7$  as the total number of objects in 5 groups of 7 objects each. *For example, describe a context in which a total number of objects can be expressed as  $5 \times 7$ .*

### 3.OA.2

Interpret a fraction as division of the numerator by the denominator ( $a/b = a \div b$ ). Solve word problems involving division of whole numbers leading to answers in the form of fractions or mixed numbers.

### 3.OA.3

Use multiplication and division within 100 to solve word problems in situations involving equal groups, arrays, and measurement quantities, e.g., by using drawings and equations with a symbol for the unknown number to represent the problem.<sup>1</sup>

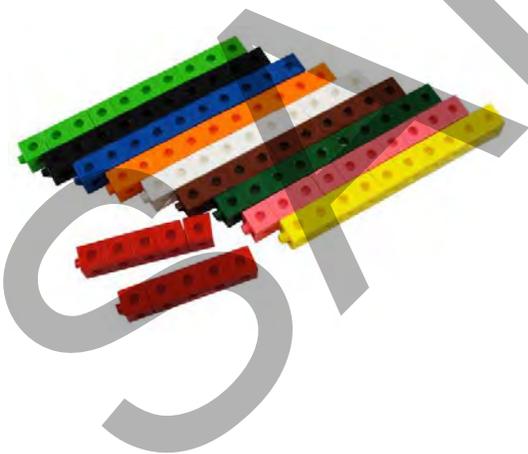
### 3.OA.8

Solve two-step word problems using the four operations. Represent these problems using equations with a letter standing for the unknown quantity. Assess the reasonableness of answers using mental computation and estimation strategies including rounding.<sup>3</sup>



## MANIPULATIVES

Students should have access to **connecting cubes** and **counters** throughout Unit 2. They will use these tools to model the situations in the math stories.



# Unit 2 Multiplication and Division

## Week 4: Grouping & Sharing Division



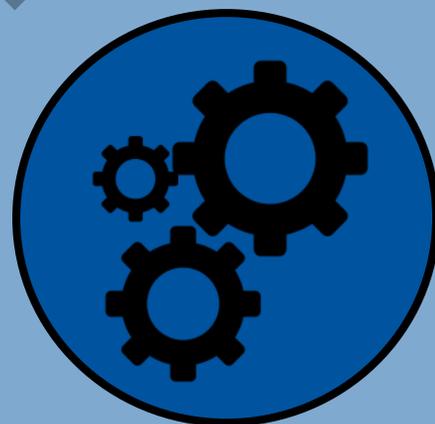
### WHAT?

**Students model two different types of division situations: Grouping division situations and Sharing (Equal Shares) division situations. Students will make connections between a “missing factor” multiplication equation and a division equation.**

3.OA.2 Interpret whole-number quotients of whole numbers, e.g., interpret  $56 \div 8$  as the number of objects in each share when 56 objects are partitioned equally into 8 shares, or as a number of shares when 56 objects are partitioned into equal shares of 8 objects each.

### WHY?

- Once students understand the meaning of multiplication in terms of finding the total number of items given the number of groups and the number of items in a group, division can be understood by thinking in terms of finding a missing factor (either the number of groups or the number of items in a group).
- Students will begin to develop their understanding of division by solving problems in which collections can be grouped or shared into equivalent groups with no remainders.
- Connecting concrete and pictorial models to both forms of division (Grouping and Sharing), is essential to eliminating the misconception that division is commutative.



### HOW?

- Students will first explore the different division situations using manipulatives and drawings.
- Initially, students will then represent their division situation as a “missing factor” multiplication equation.
- Based on their work in Unit 1, students will be able to identify what the different factors in the multiplication equation represents [i.e., the number of groups, the number in each group, the total]
- The teacher will introduce the division equation by making explicit connections to the students’ multiplication equations.



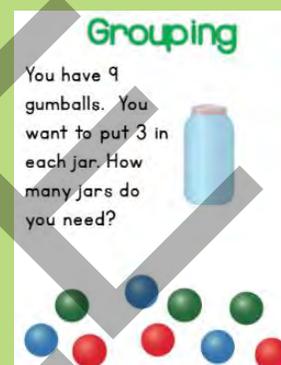
# Unit 2 Multiplication and Division

## Week 4: Grouping and Sharing Division

### STRATEGIES

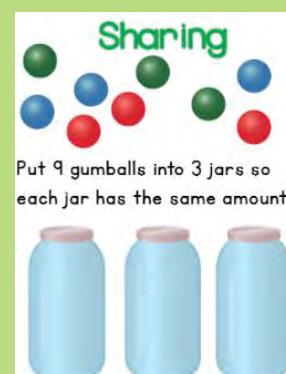
#### Grouping Division

1. Students count out the total first and then separate into equal groups by counting until all cubes are gone.
2. Students initially form groups and count one-by-one, group-by-group, until they get the total.



#### Sharing Division

1. Students count out the total first and then deal out one-by-one into groups until the total is gone, then count how many are in each group
2. Students count out the total and begin by putting a guessed amount in each group to start, add more or take away until groups are equal.



### BIG IDEAS

#### **Missing Factor Multiplication**

Division can be understood by thinking in terms of finding a missing factor (either the number of groups or the number in each group).

#### **Types of Division**

There are two distinct meanings of division (Grouping and Sharing) and students will model the two types of division problems differently.

#### **Relationship Between Multiplication and Division**

Students will use their “missing factor” multiplication equations to help them make connections to the division equation.



# Math Stories Week at a Glance

## Unit 2 Week 4: Grouping and Sharing Division



3.OA.2 Interpret whole-number quotients of whole numbers, e.g., interpret  $56 \div 8$  as the number of objects in each share when 56 objects are partitioned equally into 8 shares, or as a number of shares when 56 objects are partitioned into equal shares of 8 objects each.

### Vocabulary: *missing factor, division equation, fact family*

I can use concrete materials to model various division problems.

I can identify the information given in the problem as well as the missing information.

I can connect my model to multiplication and division equations.



**Big Idea 1:** Division can be understood by thinking in terms of finding a missing factor (either the number of groups or the number of items in each group).

**Big Idea 2:** There are two distinct meanings of division [Grouping and Sharing] and students will model the two types of division problems differently.

**Big Idea 3:** Students can represent their solution strategies using both a multiplication equation and a division equation and explain what the numbers mean in each.

30 min	Math Story	Key Ideas
Day 1	<p><b>2.1 Part 1: Fish</b> There are 28 fish, with 7 fish in each fish bowl. How many fish bowls are there?</p> <p><b>2.1 Part 2: Cookies</b> Mr. Franke baked 28 cookies. He gave all the cookies to 4 friends, being careful to give the same number of cookies to each friend. How many cookies did each friend get?</p>	<ul style="list-style-type: none"> <li>There are two parts to the Math Story today because students will model [manipulatives and/or pictures] and solve these two problems very differently as one is a <b>grouping</b> division problem (fish) and one is a <b>sharing</b> division problem (cookies). It is important for students to be able to see these two problems side-by-side to be able to compare <b>how</b> they solved them.</li> <li>Students will initially use “missing factor” multiplication equations to represent these two types of division problems. Part 1: <math>\underline{\quad} \times 7 = 28</math> Part 2: <math>4 \times \underline{\quad} = 28</math></li> <li>Students will identify what the factors and product in the multiplication equation represent.</li> </ul> <div style="text-align: center;"> <p>Part 1: <math>\underline{\quad} \times 7 = 28</math></p> <p>Part 2: <math>4 \times \underline{\quad} = 28</math></p> </div>

<p><b>Day 2</b></p>	<p><b>2.2 Part 1: Flowers</b> Riley has 32 flowers. She wants to equally share the flowers among 4 of her friends. How many flowers will each friend get?</p> <p><b>2.2 Part 2: Crayons</b> John has 32 crayons and some boxes. He wants to put 8 crayons in each box. How many boxes will he need?</p>	<ul style="list-style-type: none"> <li>• Students, will again, have two problems to solve on this day in order to see how they model and solve them differently.</li> <li>• Part 1 is a <b>sharing</b> division problem and Part 2 is a <b>grouping</b> division problem.</li> <li>• Students will represent the Flowers problem with a “missing factor” multiplication equation and be able to identify what each factor represents. <math>4 \times \underline{\quad} = 32</math></li> <li>• Students will also represent the Crayons problem with a “missing factor” multiplication equation and be able to identify what each factor represents. <math>\underline{\quad} \times 8 = 32</math></li> <li>• Students will compare and contrast the two problems and determine which one was missing the <b>number in each group</b> and which one was missing the <b>number of groups?</b></li> <li>• Teacher will introduce and make the connection to the division equation. <b><math>32 \div 8 = 4</math> and <math>32 \div 4 = 8</math></b></li> <li>• Teacher will introduce the term <b>fact family</b> and connect it to the multiplication and division equations that were given.</li> <li>• Any multiplication equation has a corresponding division equation. We can use our multiplication facts to help us solve division equations.</li> </ul>
<p><b>Day 3</b></p>	<p><b>2.3 Cupcakes</b> Mr. Gomez has 20 cupcakes. He wants to put them in 4 boxes so that each box has the same amount. How many cupcakes can he put in each box?</p>	<ul style="list-style-type: none"> <li>• This is a <b>sharing</b> division problem (note: it is <b>not</b> important that students know which type of division problem this is).</li> <li>• Students may use two different strategy variations when modeling/solving this <b>sharing</b> division problem:       <ol style="list-style-type: none"> <li>1.) Count out the total first and then deal out one-by-one into groups until the total is gone, count how many in each group</li> <li>2.) Count out the total and begin by putting a guessed amount in each group to start, add more or take away until groups are equal.</li> </ol> </li> <li>• Students will represent this problem as a “missing factor” multiplication equation and be able to identify what each factor represents. <math>4 \times \underline{\quad} = 20</math></li> <li>• Teacher will connect multiplication equation to division equation. <math>20 \div 4 = 5</math></li> <li>• Multiplication and division are related.</li> <li>• We can use our multiplication facts to solve division problems.</li> </ul>

<p><b>Day 4</b></p>	<p><b>2.4 Marble Game</b> Elliott and his friends want to play a game with marbles. There are 18 marbles and each player needs 6 marbles. How many people can play?</p>	<ul style="list-style-type: none"> <li>This is a <b>grouping</b> division problem (note: it is <b>not</b> important that students know which type of division problem this is).</li> <li>Students may use two different strategy variations when modeling/solving this <b>grouping</b> division problem.</li> <li>Students will represent this problem as a “missing factor” multiplication equation and be able to identify what each factor represents. <math>\underline{\quad} \times 6 = 18</math></li> <li>Teacher will connect to division equation. <math>18 \div 6 = 3</math></li> <li>Multiplication and division are related.</li> <li>We can use our multiplication facts to solve division problems.</li> </ul>
<p><b>Day 5</b></p>	<p><b>2.5 Pencils</b> Bart has 6 boxes of pencils with the same number of pencils in each box. Altogether he has 24 pencils. How many pencils are in each box?</p>	<ul style="list-style-type: none"> <li>This is a <b>sharing</b> division problem (note: it is <b>not</b> important that students know which type of division problem this is).</li> <li>Students may use two different strategy variations when modeling/solving this <b>sharing</b> division problem.</li> <li>Students will represent this problem as a “missing factor” multiplication equation and be able to identify what each factor represents. <math>6 \times \underline{\quad} = 24</math></li> <li>Teacher will connect to division equation. <math>24 \div 6 = 4</math></li> <li>Multiplication and division are related.</li> <li>We can use our multiplication facts to solve division problems.</li> </ul>

# Classroom-Based Instruction Week at a Glance

## READY Unit 2 Week 4: Lesson 21

### Solve Problems about Time



3.MD.1 Tell and write time to the nearest minute and measure time intervals in minutes. Solve word problems involving addition and subtraction of time intervals in minutes, e.g., by representing the problem on a number line diagram.

**Vocabulary:** *elapsed time*

Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Independent Practice
		15 Minutes	15 Minutes	30 Minutes
		<i>Engage-Problem-Discussion-I Can</i>	<i>At least 2 aligned problems</i>	Small Group Options
Day 1: I can use clocks and number lines to understand elapsed time.		Lesson Book Pg. 220-221	Lesson Book Pg. 221 #1	<b>Practice &amp; Problem Solving Book:</b> Pages 233-234  <b>i Ready:</b> <i>Time Out!</i> Solve Problems About Time
Day 2: I can use clocks and number lines to understand elapsed time.		Lesson Book Pg. 222-223	Lesson Book Pg. 223 #6, #7	<b>Practice &amp; Problem Solving Book:</b> Pages 235-236  <b>i Ready:</b> <i>Time Out!</i> Solve Problems About Time
Day 3: I can use clocks and a number line to solve a problem to find the start time.		Lesson Book Pg. 224-225	Lesson Book Pg. 225, #11, #12	<b>Practice &amp; Problem Solving Book:</b> Pages 237-238  <b>i Ready:</b> <i>Time Out!</i> Solve Problems About Time
Day 4: I can use clocks, number lines, and equations to solve problems about elapsed time.		Lesson Book Pg. 226-227	Lesson Book Pg. 228	<b>Practice &amp; Problem Solving Book:</b> Pages 239-240  <b>i Ready:</b>

			<i>Time Out!</i> Solve Problems About Time
Day 5: I can use clocks, number lines, and equations to solve problems about elapsed time.	Lesson Book Pg. 229 Review as needed before quiz		<b><u>Assessment</u></b>  Lesson 21 Weekly Quiz [3.MD.1]

SAMPLE

## Unit 2 Week 4 Grouping and Sharing Division

### Day 1

<b>Snap Facts Routine</b>		 <b>5 Minutes</b>
<p><b>Practice 1s and 2s</b></p> <p>See Unit 1, Week 3, Lesson 5 for 'Snap Fact Routine' lesson plan See Appendix for 'Student Directions' page</p>		
<b>Math Story [3.OA.2]</b>		 <b>40 Minutes*</b>
<p><b>Math Story 2.1 Part 1: Fish</b> <i>There are 28 fish, with 7 fish in each fish bowl. How many fish bowls are there?</i></p> <p><b>Math Story 2.1 Part 2: Cookies</b> <i>Mr. Franke baked 28 cookies. He gave all the cookies to 4 friends, being careful to give the same number of cookies to each friend. How many cookies did each friend get?</i></p>		
<b>Engage</b> [4 min]	<p>A. Show Engage image for MS 2.1 [See myNHA]</p> <p>B. Pose Turn and Talk: <b><i>What do you notice? What do you wonder?</i></b> </p> <p>C. Call on multiple students to share. [Option to record responses]</p>	
<b>Problem</b> [12 min]	<b>Visualize the story</b>	<p>A. Ask students to close their eyes or look at the picture from the Engage to visualize what is happening while you tell the Math Story. <b><i>There are 28 fish, with 7 fish in each fish bowl.</i></b></p>
	<b>Retell</b>	<p>B. <i>Think-</i> Have students think about what they heard in the story. <b><i>What did you hear first? What did you hear next?</i></b> </p> <p><i>Pair-</i> <b><i>Retell the story to your partner.</i></b></p> <p><i>Share-</i> Call on one or two students to retell the story, using the questions <b><i>What did you hear first? What did you hear next?</i></b></p>

Re-read with question	<p>C. Read the Problem again with the question.  <b><i>There are 28 fish, with 7 fish in each fish bowl. How many fish bowls are there?</i></b></p>
Make Sense	<p>D. Pose Think, Pair, Share question to allow students to estimate and/or explore reasonable solutions.</p> <p><b><i>Do you think there will be more than 2 bowls?</i></b> </p>
Solve	<p>E. Ask students to model the problem using cubes or pictures and document the strategy they use on their recording sheet.</p> <p><b><i>Now that you have a visual image of what is happening in today's story, I want you to:</i></b></p> <ol style="list-style-type: none"> <li><b><i>1. Think about how you are going to use your cubes to figure out how many fish bowls there are?</i></b></li> <li><b><i>2. At your desk, use cubes to figure out how many fish bowls there are.</i></b></li> <li><b><i>3. Try and write a multiplication equation to represent this problem.</i></b></li> <li><b><i>4. When you have a strategy, talk with your partner and share your strategy that you used to figure out how many fish bowls before we start our discussion.</i></b></li> </ol>
Circulate & Ask Probing Questions	<p>F. Circulate, listen and observe student thinking. Then ask probing questions and keep students connected to the context of the Math Story.</p> <ol style="list-style-type: none"> <li><b><i>a. What do we know in the problem?</i></b></li> <li><b><i>b. How many cubes are you going to start with? How do you know?</i></b></li> <li><b><i>c. Is there another way you could solve?</i></b></li> </ol>

	<b>Choose</b>	<p><b>G.</b> Identify students who have shown different ways to figure out how many fish bowls there are.</p> <p style="padding-left: 40px;">Example:</p> <ul style="list-style-type: none"> <li>○ Student who counted out 28 cubes to start and then parceled them out by 7s until there were no more cubes left.</li> <li>○ Student who did not count out 28 cubes first but started by counting 7 into each group.</li> <li>○ Student who represented their strategy with a “missing factor” multiplication equation.</li> </ul>
<p><b>Math Story</b> <b>1.16</b> <b>Part 2</b> [10 minutes]</p>	<p><b>H.</b> Tell students that you are going to give them one more problem to do. Go through the same steps as above:</p> <ul style="list-style-type: none"> <li>○ Read once without question</li> <li>○ Have students visualize and retell</li> <li>○ Read problem again WITH question</li> <li>○ Have students estimate if they think each friend will get more than 2 cookies? More than 3 cookies?</li> <li>○ Solve</li> </ul> <p><b><i>Mr. Franke baked 28 cookies. He gave all the cookies to 4 friends, being careful to give the same number of cookies to each friend. How many cookies did each friend get?</i></b></p>	

Discussion  
[6 min]

- A. Chart strategies on an anchor chart based on the order that you want to highlight them, in order to be able to arrive at your Key Points.

**Sample Anchor Chart:**

The anchor chart displays two math problems and their solutions:

- Problem 1:** "There are 28 fish, with 7 fish in each fish bowl. How many fish bowls are there?"  
 Solution: A drawing of 4 fish bowls, each containing 7 cubes. A label says "4 fish bowls".
- Problem 2:** "Mr. Frankle baked 28 cookies. He gave all the cookies to 4 friends, being careful to give the same number of cookies to each friend. How many cookies did each friend get?"  
 Solution: A drawing of 4 stick figures, each with 7 cookies. A label says "7 cookies".



- B. Turn and Talk Question: **What do you notice about these two problems? What did [insert student's name] do differently when solving these two problems?**

***I noticed that a lot of us counted out 28 cubes to start in both problems. We used those cubes in different ways to solve these problems.***

***We had 28 cubes that we wanted to share among fish bowls, and we also had 28 cubes that were cookies that we wanted to share among people.***

***Let's look at these two problems side by side and take a moment to discuss with our partner one similarity and one difference that you notice.*** [Call on multiple students to share out]

Possible student responses:

- We used the same numbers in both problems
- We wrote a multiplication equation for both
- One was about fish and fish bowls and one was about cookies and people
- We were missing the 4 in the fish bowl equation, we were missing the 7 in the cookie equation

**We wrote two multiplication equations to represent these two problems, the big difference today is that we were missing one of our factors. Let's look at which factor we were missing in each problem.**

**Key Points**  
[4 min]

- In problem #1 we were trying to find out the number of fish bowls. Thinking back to last week, does this factor represent the number of groups or the number in each group? Turn and tell your partner. [Label on anchor chart “Number of groups” under the 4]
- In problem #2 we were trying to find the number of cookies that each friend got. Again, thinking back to last week, does this factor represent the number of groups or the number in each group? Turn and tell your partner. [Label on anchor chart “Number in each group” under the 7]

The anchor chart is divided into two columns. The left column is for the fish problem: 'There are 28 fish, with 7 fish in each fish bowl. How many fish bowls are there?'. It shows four groups of seven fish (represented by small squares) in pink circles, labeled 1, 2, 3, and 4. Below this is a multiplication equation  $4 \times 7 = 28$  with a box around the 4 and a label '# of groups' below it. The right column is for the cookie problem: 'Mr. Franke baked 28 cookies. He gave all the cookies to 4 friends, being careful to give the same number of cookies to each friend. How many cookies did each friend get?'. It shows four stick figures, each with seven cookies (represented by small circles) next to them, labeled 1, 2, 3, and 4. Below this is a multiplication equation  $4 \times 7 = 28$  with a box around the 7 and a label '# in each group' below it. A large green arrow points from the right column towards the left column.

	<p><b><i>Boys and girls, today you were able to solve “missing factor” multiplication problems, where one piece of information, or one of our factors was missing.</i></b></p> <p><b><i>Today in your Practice Problem and the rest of this week we are going to be working with multiplication problems where one of our factors is missing.</i></b></p>	
<p><b>Practice Problem</b> [5 min]</p>	<p>Students will now solve one practice problem on their own.</p> <p><b>Directions: Solve the problems using cubes or by drawing a picture. Then, write a multiplication equation to represent the problem.</b></p> <p><b>1.) Mr. Johnson’s chickens laid 24 eggs. There are 6 eggs in each nest. How many nests are there on Mr. Johnson’s farm?</b></p> <p><b>2.) Eleanor loves to bake brownies. She baked 24 brownies for her after-school club. There are 6 people in the after-school club and she wants to be sure that everyone gets the same number of brownies. How many brownies will each person get?</b></p>	
 45 min	<h2>Classroom-Based Instruction</h2>	
15 min	Introduction to New Material	Lesson Book Pg. 220-221
10 min	Guided Practice	Lesson Book Pg. 221 #1
20 min	Independent Practice & Small Group Weekly Options	<div style="background-color: #e1f5fe; padding: 5px; text-align: center;"><b>Independent Practice</b></div> <p style="text-align: center;">Practice and Problem Solving Book Pgs. 233-234</p> <div style="background-color: #e8f5e9; padding: 5px; text-align: center;"><b>iReady</b></div> <p style="text-align: center;"><b>Time Out! Solve Problems About Time</b></p> <div style="background-color: #ffe0b2; padding: 5px; text-align: center;"><b>Teacher Small Group</b></div> <p style="text-align: center;">Option to pull small groups based on formative assessment. Use READY materials to reteach or extend.</p>

# 6-8 MATH LESSON CYCLE STRUCTURE OVERVIEW

**WHOLE GROUP:** [Activity Day: 45 – 60 minutes] [Lesson Day: 30 – 45 minutes]

<b>DO NOW</b>		 8-10 Minutes
<p>The Do Now is part of the Entrance Routine. The Do Now should consist of 1-2 problems that take approximately 5 minutes to complete. Students begin working on this immediately upon entering the classroom and should not need support from the teacher. The teacher should spend between 3-5 minutes reviewing the Do Now so that the lesson can begin within the first ten minutes of class.</p>		
<b>ENGAGE</b>		 5 Minutes
1.	Show the Engage image [see Week at a Glance]. This will allow students to begin thinking about the context of the problem.	
2.	<p>Pose questions to students using a Think-Pair-Share structure:</p>  What do you notice? What do you wonder?	
3.	Have several students share out whole group. Accept any and all responses, even non-mathematical notices and wonderings. This quick activity allows all students to engage in classroom discussion, activates prior knowledge, and allows the teacher to introduce or clarify key vocabulary for the day.	
<b>PROBLEM</b>		 10-15 Minutes
1.	<p>Pose <b>ONE</b> problem to students <b>without</b> telling students HOW to solve.</p> <ul style="list-style-type: none"> <li>• Read the problem without the question and ask students to <b>visualize</b> what is happening.</li> <li>• Facilitate Think-Pair-Share routine to have students <b>retell</b> what they know from the problem.</li> <li>• Read the problem again with the question. Pose a question that allows students to <b>estimate</b>.</li> <li>• Set <b>expectations for problem solving</b>: Allow students to work with partners in pairs and encourage students to use tools, pictures, and equations to prove their strategy.</li> </ul>	
2.	<p>Teacher circulates to observe student strategies and discussion. Teacher asks probing questions and provides scaffolded support as needed.</p> <p>This problem anchors the class discussion and introduces the key concepts for the day. The problem allows all students to work collaboratively to explore a concept and engage in productive struggle and discussion. Students are provided with manipulatives or tools to draw pictures to solve problems.</p> <ul style="list-style-type: none"> <li>• On Day 1 the problem is typically a hand- on activity to build conceptual understanding.</li> <li>• On Day 2- Day 5 the problem is typically a story problem from the text.</li> </ul>	

DISCUSSION & KEY POINTS (I CAN)		 10-15 Minutes
1.	Choose a few students to share their solution strategies based on strategies you have pre-planned to highlight.	
2.	Teacher facilitates as different students are called on to share their thinking with the class. After a few students have shared their strategies for solving the problem, the teacher allows for student processing by asking an additional question. For example: What is similar about these strategies? What is different about these strategies?	
3.	Teacher introduces I CAN statement and models a sample problem/strategy or key concept for the class on the white board or an anchor chart. This anchor chart becomes a tool that students can refer to during guided practice and small group.	
GUIDED PRACTICE		 5-10 Minutes
Teacher has students work in pairs to complete additional practice problems that review the concept introduced with the anchor problem. Teacher will reference the newly created anchor chart and I CAN statement after reviewing each problem. This is quick practice where students work together and then come back to discuss as a class. The teacher can use this as a check for understanding before releasing students to independent practice.		

### SMALL GROUP: [Activity Day: 30 – 45 minutes] [Lesson Day: 45 – 60 minutes]

Students should experience at least **two** of the activities each day. Minimal teacher preparation is required for the Independent Practice and Collaborative Practice. This practice will come from Big Ideas or Engage New York. [See Week at a Glance for more guidance.] This will allow teachers to focus their time on preparing for the whole group lesson and the teacher small group lesson. Weeks 1-4 are used to establish strong procedures and expectations for small group instruction. [See Small Group Structure Overview]

ACTIVITY DAY: 2 ROTATIONS @ 10-15 MIN EACH			
	Group 1 (At/Above GL)	Group 2 (Below GL)	Group 3 (At Risk)
Day 1 & 3	Independent Practice	Collaborative Practice	Teacher Group
	Collaborative Practice	Teacher Group	Independent Practice
LESSON DAY: 3 ROTATIONS @ 15-20 MIN EACH			
	Group 1 (At/Above GL)	Group 2 (Below GL)	Group 3 (At Risk)
Day 2 & 4	Collaborative or Independent Practice	Computer	Teacher Group
	Computer	Teacher Group	Collaborative or Independent Practice
	Teacher	Collaborative or Independent Practice	Computer

EXIT TICKET	 5 Minutes
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# Classroom-Based Instruction Week at a Glance

## Week 1: Classroom Culture & Routines/Procedures



Day	Classroom Culture Focus
1	
2	
3	
4	
5	

# Classroom-Based Instruction Week at a Glance

## Week 2: Solving Simple Equations & Solving Multi-Step Equations



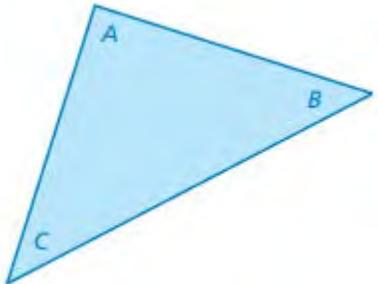
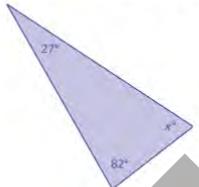
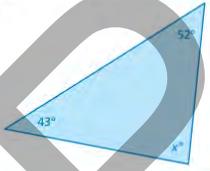
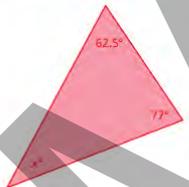
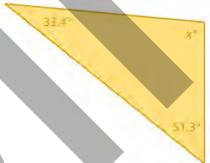
**8.EE.7a** Give examples of linear equations in one variable with one solution, successively transforming the given equation into simpler forms, until an equivalent equation of the form  $x = a$  results .

**8.EE.7b** Solve linear equations with rational number coefficients, including equations whose solutions require collecting like terms.

Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Small Group Instruction		
		35-45 minutes	10-15 minutes	30-45 minutes		
		<b>Lesson Cycle:</b> Engage – Problem – Discussion – Key Points	At least 2 aligned problems	Independent Practice Problem Sets	Collaborative Problem Sets	Teacher Small Group
Day 1: <b>BI Lesson 1.1 Solving Simple Equations</b> I can solve simple equations using addition, subtraction, multiplication, or division		<b>1.1 [Pg. 2-6]</b> <b>Problem:</b> pg. 3 <i>Activity 3</i> <b>Discussion:</b> Could we have solved this by writing an equation? Key Point: Example 1 & 2	On Your Own pg. 5 #1-9	pg. 7 #7-15, 18-20	Pg. 8 21-27	Pg. 7 1-6
Day 2: <b>BI Lesson 1.1 Solving Simple Equations</b> I can solve simple equations using addition, subtraction, multiplication, or division		<b>1.1 Pg. 6</b> <b>Problem:</b> Pg. 41 ANTS <b>Discussion:</b> What strategies did you use to solve? What did we learn yesterday that could help? Key Point: Example 3 & 4	Pg. 6 On Your Own #10-12	pg. 7-9 #s 16-17, 28-35	Pg. 8 #36-40, 42, 44	RAP-J 1.1 Practice all
Day 3: <b>BI Lesson 1.2 Solving Multi-Step Equations</b> I can use inverse operations to solve multi-step equations. I can use the Distributive Property to solve multi-step equations.		<b>1.2 [Pg. 10-11]</b> <b>Problem:</b> <i>Activity 1 &amp; 2</i> <b>Discussion:</b> What must you do before you can solve? Are there steps you must follow? Key Point: Example 1 & 2	On Your Own Pg. 12 #1-3	Pg. 14 # 3-9		Pg. 14 #1-2
Day 4: <b>BI Lesson 1.2 Solving Multi-Step Equations</b> I can use inverse operations to solve multi-step equations. I can use the Distributive Property to solve multi-step equations.		<b>1.2 [Pg. 11]</b> <b>Problem:</b> <i>Activity 3</i> <b>Discussion:</b> Is there more than one way to solve? What are your strategies? Key Point: Example 3 & 4	On Your Own Pg. 13 #4-6	pg. 14 #12-17 & Pg. 17 #11-14	Pg. 14 #18 & RAP-J 1.2 Practice all	Teacher choice based on student need
Day 5: I can assess my understanding of writing and solving multi-step equations		<b>White Board Review:</b> Pg. 17 #1-10	<b>8.EE.7a &amp; 8.EE.7b QUIZ</b>			

# Introduction to New Material

## Week 2: Solving Simple Equations & 1.2: Solving Multi-Step Equations

Day	Engage	Problem	Key Ideas
1	<p>Show:</p>  <p>Ask: What do you notice? What do you wonder?</p>	<p>Bl p. Problem: <b>pg. 3 Activity 3</b> Work with a partner. Use the rule you wrote in Activity 2 to write an equation for each triangle. Then solve the equation to find the value of <math>x</math>. Use a protractor to check the reasonableness of your answer.</p> <p>a. </p> <p>b. </p> <p>c. </p> <p>d. </p> <p><b>Discussion:</b> How can you use a rule to solve problems in math? Could we have solved this by writing an equation? How?</p>	<p>Bl p. 4 Key Point: Key Idea, <i>Example 1 &amp; 2</i> Key Ideas:</p> <div style="border: 1px solid black; padding: 10px;"> <p><b>1.1 Solving Simple Equations</b></p> <p><u>Equation</u>: two expressions separated by an <u>equal sign</u>. ex: <math>3x = 12</math>, <math>-2x - 1 = 13</math></p> <p>* <u>Solution to an equation</u>: What the variable equals after solving the equation. ex: <math>y = -2</math> <math>x = 7</math></p> <p>* <u>Addition Property of Equality</u>: Adding the same # to each side of an equation produces an equivalent (equal) equation. "what you do to one side, you must do to the other." ex: if <math>5 + 2 = 5 + 2</math> then <math>5 + 2 + 3 = 5 + 2 + 3</math> or if <math>a = b</math> then <math>a + c = b + c</math></p> <p>* <u>Subtraction property of Equality</u>: Subtracting the same # from each side of an equation produces an equivalent equation. ex: if <math>x - 7 = 13</math> then <math>x - 7 - 7 = 13 - 7</math></p> <p>* <u>Multiplication &amp; division property of equation</u>: ? create your own definition</p> </div>

### Example 1 & Guided Practice

\* inverse operations : one operation that "undoes" another

- + undoes -
- undoes +
- undoes ÷
- ÷ undoes •

**EX1:** Solve equations using addition or subtraction.

a)  $x - 7 = -6$  or  $x - 7 = -6$   
 $+7 \quad +7$        $x + (-7) = -6$   
 $x = 1$        $x = 1$

b)  $y + 3.4 = 0.5$       rewrite  $\frac{3.4}{-0.5}$   
 $-3.4 \quad -3.4$        $-0.5$   
 $y = -2.9$        $-2.9$   
 (rewrite using War + line up your dec.)

c)  $h + 2\pi = 3\pi$  (which one is the variable?)  
 $-2\pi \quad -2\pi$   
 $h = 1\pi \rightarrow h = \pi$

**Practice**

1)  $r - \pi = \pi$       2)  $5.6 + z = -8$   
 $r = 2\pi$        $z = -13.6$

**Laws of Algebra**

- 1) Must get the var. alone!
- 2) Use inverse operations
- 3) What you do to one side, you must always do to the other

**How?**

- rewrite as addition
- Can I distribute
- Get all of your variables to one side
- Combine like terms
- Use inverse operations
- Make sure your variable is in the front!

### Example 2 & Guided Practice

**EX2** Solving equations using mult/div.

a)  $-\frac{3}{4}n = -2$       Note: use the multiplicative inverse (reciprocal)

$-\frac{4}{3} \cdot -\frac{3}{4}n = -2 \cdot (-\frac{4}{3})$   
 $\frac{12}{12} = 1$       = rewrite       $-\frac{2}{1} \cdot -\frac{4}{3}$   
 $1n = \frac{8}{3}$       or  $n = 2\frac{2}{3}$

b)  $\frac{\pi x}{17\pi} = \frac{3\pi}{17\pi}$   
 $x = 3$

**practice**

1)  $6\pi = \pi x$       2)  $0.09w = 1.8$   
 $x = 6$        $w = 20$

2

Show:



Ask:  
What do you notice? What do you wonder?

Bl p. 41  
Problem: **Problem:** Pg. 41 ANTS

41. **ANTS** Some ant species can carry 50 times their body weight. It takes 32 ants to carry the cherry. About how much does each ant weigh?



**Discussion:** What strategies did you use to solve this problem. What did we learn yesterday that could help?

Bl p. 6  
Key Point: *Example 3 & Example 4*

**EX3** Identify solutions

$K + 4 \div 0.2 = 5$       a) -15   b) -5   c) -3   d) 15

$K + 20 = 5 \rightarrow 0.2 \begin{array}{r} 20 \\ 40 \\ \hline 40 \\ 00 \end{array}$

$K = 5 + (-20)$

$K = -15$

**EX4** Real Life Application

\* read 3 before trying me! Pg. 6

Q's = What does "of" stand for? (multiply)

bromine =  $\frac{1}{30}$  of nitrogen      what about is? (equal)

$-7 = \frac{1}{30} \cdot n$  or  $-7 = \frac{1}{30}n$

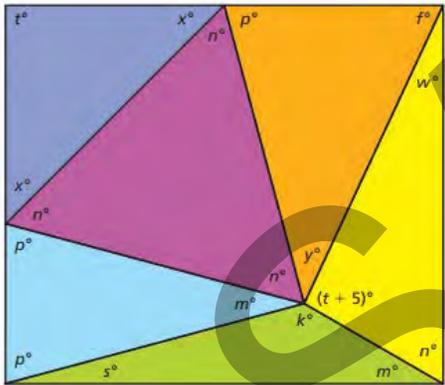
$\frac{30}{1} \cdot -7 = \frac{1}{30} \cdot \frac{30}{1} \cdot n$

$-210 = n$  so  $n = -210$  now, answer

\*  $-210^\circ\text{C}$  is the melting point of nitrogen.

3

Show:

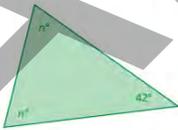
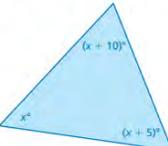


Ask:  
What do you notice? What do you wonder?

Bl p.10 -11  
Problem: *Activity 1 & Activity 2*

**Activity 1: Solving for angles in a triangle**

Work with a partner. Write an equation for each triangle. Solve the equation to find the value of the variable. Then find the angle measures of each triangle. Use a protractor to check the reasonableness of your answer.

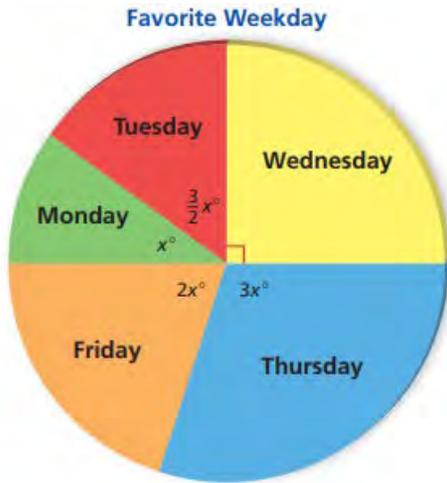
a.       b. 

**Activity 2: Problem Solving Strategy**

Bl p. Pg. 12  
Key Idea, *Example 1 and 2*  
Key Point:



Show:

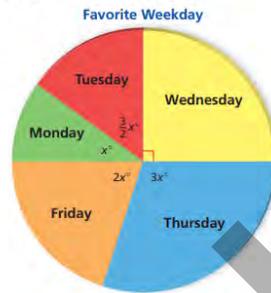


BI p. 11 Activity 3

Problem:

Work with a partner. A survey asked 200 people to name their favorite weekday. The results are shown in the circle graph.

- How many degrees are in each part of the circle graph?
- What percent of the people chose each day?
- How many people chose each day?
- Organize your results in a table.



Discussion: Is there more than one way to solve? What are your strategies?

BI p. 13 Example 3 and 4

Key Point: Example 3

**EX3** using the distributive Property

$$2(1-5x)+4=-8 \text{ or } 2(1-5x)+4=-8$$

$$2-10x+4=-8 \text{ or } 2(1+(-5x))+4=-8$$

$$2+(-10x)+4=-8 \quad 2+(-10x)+4=-8$$

$$\begin{array}{r} 6+(-10x)=-8+(-6) \\ -6 \quad -8+(-6) \\ \hline -10x=-14 \\ \frac{-10x}{-10}=\frac{-14}{-10} \\ \boxed{x=1.4} \end{array}$$

$$\begin{array}{r} -10x+6=-8-6 \\ \quad -6 \\ \hline -10x=-14 \\ \frac{-10x}{-10}=\frac{-14}{-10} \\ \boxed{x=1.4} \end{array}$$

Example 4

**EX4: Real Life Application**

Day	Miles
M	2
T	0
W	1.5
Th	0
F	

How many miles do I need to run on Friday so that my mean is 1.5 miles a day?

**STEP 1:** Write an equation?

recall: What is mean?  
 (Average =  $\frac{\text{total or sum}}{\text{\# of Values}}$ )

**Step 1:**  $\frac{2+0+1.5+0+x}{5} = 1.5 \rightarrow$  undo division

$$\frac{5}{1} \cdot \frac{(2+0+1.5+0+x)}{5} = 1.5 \cdot 5$$

$$2+0+1.5+0+x = 1.5 \cdot 5$$

$$\begin{array}{r} 3.5+x=7.5 \\ -3.5 \quad -3.5 \\ \hline x=4 \text{ miles on Friday!} \end{array}$$

4

Ask:

What do you notice? What do you wonder?

5

White Board Review:  
Pg. 17 #1-10

8.EE.7a & 8.EE.7b QUIZ

# Classroom-Based Instruction Week at a Glance

## Week 3: Solving Equations with Variables and Rewriting Equations & Formulas



**8.EE.7a** Give examples of linear equations in one variable with one solution, successively transforming the given equation into simpler forms, until an equivalent equation of the form  $x = a$  results.

**8.EE.7b** Solve linear equations with rational number coefficients, including equations whose solutions require collecting like terms.

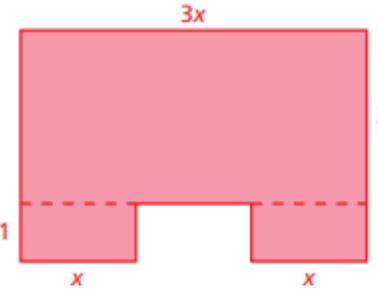
Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Small Group Instruction		
		35-45 minutes	10-15 minutes	30-45 minutes		
		<b>Lesson Cycle:</b> Engage – Problem – Discussion – Key Points	At least 2 aligned problems	Independent Practice Problem Sets	Collaborative Problem Sets	Teacher Small Group
<b>Day 1: BI Lesson 1.3: Solving Equations with Variables</b> I can solve equations with variables on both sides.		<b>1.3 Pg. 18-19</b> <b>Problem:</b> Activity 1 & 2 <b>Discussion:</b> How can we solve an equation when there is a variable on both sides of the equation? How do we get the variables all together? <b>Key Point:</b> Example 1 & 2	Pg. 20 "On your own" #1-3	pg. 23 #6-15	Pg. 23 #1-5	Teacher choice based on student need
<b>Day 2: BI Lesson 1.3: Solving Equations with Variables</b> I can solve equations with variables on both sides.		<b>1.3 Pg. 21</b> <b>Problem:</b> On your Own #4 <b>Discussion:</b> Does every equation have a solution? Is it possible to have more than one solution? <b>Key Point:</b> Example 4 & 5	Pg. 21 "On Your Own" #5-7	pg. 23-25 #'s 17-29 odd, 30-36	Pg.25 #37-38	RAP-J 1.3 Practice all
<b>Day 3: BI Lesson 1.4: Rewriting Equations and Formulas</b> I can rewrite equations to solve for one variable in terms of the other variable(s).		<b>1.4 Pg. 26, 28</b> <b>Problem:</b> Activity 1 (a-c) <b>Discussion:</b> Why is it beneficial to rearrange formulas? How can you use one formula to write a formula for a different measurement or variable? <b>Key Point:</b> Example 1 & 2	Pg. 27 Activity 2 And pg. 28 "On Your Own" #1-6	Pg. 30 # 3-13	Pg. 30-31 #1-2 22, 23	Teacher choice based on student need

<p><b>Day 4: BI Lesson 1.4: Rewriting Equations and Formulas</b>                  I can rewrite equations to solve for one variable in terms of the other variable(s).</p>	<p><b>1.4 Pg. 27, 29</b>  <b>Problem: Activity 2</b>  <b>Discussion:</b> How does what we learned yesterday help us today? Can we arrange 3D formulas the same way as 2D? Do you think rewriting and rearranging works for all formulas?  <b>Key Point:</b> Example 3 &amp; 4</p>	<p>RAP –J 1.4                  Practice all</p>	<p>pg. 31                  #14-19</p>	<p>Pg. 31 #20-21</p>	<p>Teacher choice based on student need</p>
<p><b>Day 5: BI Lesson</b>                  I can assess my understanding of solving equations with variables on both sides and rewriting formulas for given variables.</p>	<p><b>8.EE.7a QUIZ</b>  <b>8.EE.7b QUIZ</b></p>				

SAMPLE

# Introduction to New Material

## Week 3: Solving Equations with Variables and Rewriting Equations & Formulas

Day	Engage	Problem	Key Ideas
1	<p>Show: Pg. 18 g</p>  <p>Ask: What do you notice? What do you wonder?</p>	<p>BI p. 18 Activity 1 Perimeter &amp; Area Problem: Work with a partner.</p> <ul style="list-style-type: none"> <li>Each figure has the unusual property that the value of its perimeter (in feet) is equal to the value of its area (in square feet). Write an equation for each figure.</li> <li>Solve each equation for <math>x</math>.</li> <li>Use the value of <math>x</math> to find the perimeter and the area of each figure.</li> <li>Describe how you can check your solution.</li> </ul> <p>Have students do a-g as needed.</p> <p>a.</p>  <p>Discussion: <i>How can we solve an equation when there is a variable on both sides of the equation?</i> <i>How do we get the variables all together?</i></p>	<p>BI p. 20 Key Ideas, Example 1 and 2 Key Point:</p> <ul style="list-style-type: none"> <li>Add or subtract to get the variable to one side.</li> <li>Choose the side that makes the most sense</li> <li>More than one way to do the first step (move to the left or right)</li> </ul> <div data-bbox="1312 592 1848 1088" style="border: 1px solid black; padding: 5px;"> <p>[1.3] Solving Equations w/ Variables on Both Sides</p> <p>Note: Must get all variables to one side and constants to the other.</p> <p>* <u>Constant Term</u>: A term with no variable. "Constantly alone!"</p> <math display="block">3x + 4x - 2 = 7</math> <p style="text-align: center;"> <math>\downarrow</math> constant      <math>\downarrow</math> constant  <math>\downarrow</math> constant         </p> <p>EX1: Vars on Both Sides</p> <math display="block">15 + 2x = -7x</math> <math display="block">+ 2x + 2x</math> <hr/> <math display="block">\frac{15}{-5} = \frac{+5x}{+5} \leftarrow \text{get } x \text{ alone!}</math> <math display="block">-3 = x</math> <div style="border: 1px solid black; display: inline-block; padding: 2px;"> <math>x = -3</math> </div> <p>Note: move variables to the side that makes the most sense!</p> </div> <div data-bbox="1312 1112 1848 1404" style="border: 1px solid black; padding: 5px;"> <p>EX2: Now add in distributive Property</p> <math display="block">-2(x-5) = 6(2 - \frac{1}{2}x)</math> <math display="block">\begin{array}{r} -2(-5) \\ -2x + 10 \end{array} = \begin{array}{r} 12 + (-3x) \\ + 3x \end{array}</math> <hr/> <math display="block">1x + 10 = 12</math> <math display="block">\begin{array}{r} -10 \\ -10 \end{array}</math> <div style="border: 1px solid black; display: inline-block; padding: 2px;"> <math>x = 2</math> </div> </div>

2

Show:

**Solve  $3 - 4x = -7 - 4x$ .**

$$3 - 4x = -7 - 4x$$

$$\begin{array}{r} \rightarrow +4x \quad +4x \\ \hline 3 = -7 \quad \times \end{array}$$

Ask:

What do you notice? What do you wonder?

BI p.  
Problem: Pg. 21 "On Your Own" #4

**4.  $2x + 1 = 2x - 1$**

Discussion: *Does every equation have a solution? Is it possible to have more than one solution?*

BI p.Pg. 21-22 Activity 4 and 5  
Key Point:

**EX4 No Solutions!**

$$\begin{array}{r} 3 - 4x = -7 - 4x \\ +4x \quad +4x \\ \hline 3 = -7 \quad (\text{Not true}) \\ \text{NO Solution} \end{array}$$

→ impossible

**practice**  
 $6(5 - 2v) = -4(3v + 1)$  → explain to me why?  
**No Solu.**

**EX5: Writing and solving an Equation**  
Find the perimeter and Area  
Start: What do we know? 7

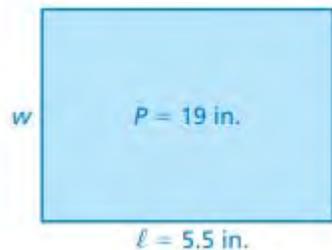
$$\begin{array}{r} 2x - 3 = 3x - 10 \\ -2x \quad -2x \\ \hline -3 = x - 10 \\ +10 \quad +10 \\ \hline x = 7 \end{array}$$

$$\begin{array}{c} 2x-3 \\ \square \\ 3x-10 \end{array}$$

Next: plug back in to determine side length  
 $2(7) - 3 = 11$

Last: evaluate & find perimeter  
 $7 + 7 + 11 + 11$   
or  $2(7) + 2(11)$   
 $p = 14 + 22 = 36 \text{ units}$   
 $A = 7(11) = 77 \text{ units}^2$

Show: Pg. 26 Activity 1a



Ask:  
What do you notice? What do you wonder?

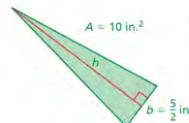
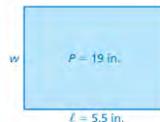
3

BI p. 26 Activity 1a-1c

Problem: Can you rearrange the formula to solve for various variables? If  $P=2l+2w$ , can we get  $w$  alone instead of  $P$ ?

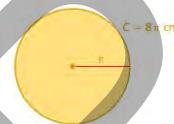
Work with a partner.

- a.
- Write a formula for the perimeter  $P$  of a rectangle.
  - Solve the formula for  $w$ .
  - Use the new formula to find the width of the rectangle.



- b.
- Write a formula for the area  $A$  of a triangle.
  - Solve the formula for  $h$ .
  - Use the new formula to find the height of the triangle.

- c.
- Write a formula for the circumference  $C$  of a circle.
  - Solve the formula for  $r$ .
  - Use the new formula to find the radius of the circle.



Discussion:

Why is it beneficial to rearrange formulas?  
How can you use one formula to write a formula for a different measurement or variable?

BI p. 28 Key Vocabulary & Examples 1 & 2  
Key Point:

1.4 Rewriting Equations and Formulas

\* Literal Equation: An equation that has 2 or more variables.  
ex:  $y = mx + b$ ,  $y = 2x - 1$ ,  $A = L \cdot w$   
 $P = 2L + 2w$ ,  $A = \frac{1}{2}bh$ ,  $I = prt$

EX1 Solving Literal Equations

Solve  $2y + 5x = 6$  solve for  $y$ .

$$\begin{array}{r} 2y + 5x = 6 \\ -5x \quad -5x \\ \hline 2y = 6 + (-5x) \end{array}$$

$$y = 3 + (-\frac{5}{2}x)$$

$$y = -\frac{5}{2}x + 3 \leftarrow \text{put your variables 1st}$$

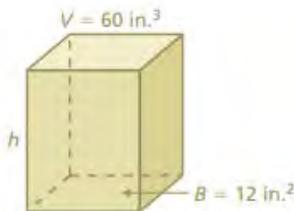
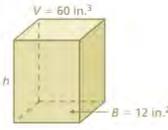
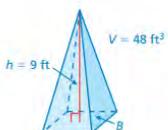
EX2 Rewrite Known Formulas

$S = \pi r^2 + \pi rL$  solve for  $L$ .

$$\begin{array}{r} S = \pi r^2 + \pi rL \\ -\pi r^2 \quad -\pi r^2 \\ \hline S - \pi r^2 = \pi rL \end{array}$$

$$\frac{S - \pi r^2}{\pi r} = \frac{\pi rL}{\pi r}$$

$$L = \frac{S - \pi r^2}{\pi r}$$

4	<p>Show:</p>  <p>Ask: What do you notice? What do you wonder?</p>	<p>BI p.27 Activity 2 a-d Problem:</p> <p>Work with a partner.</p> <p>a. • Write a formula for the volume <math>V</math> of a prism. • Solve the formula for <math>h</math>. • Use the new formula to find the height of the prism.</p>   <p>b. • Write a formula for the volume <math>V</math> of a pyramid. • Solve the formula for <math>B</math>. • Use the new formula to find the area of the base of the pyramid.</p> <p>Continue as needed with c and d. Discussion: How does what we learned yesterday help us today? Can we arrange 3D formulas the same as 2D? Do you think rewriting and rearranging works for all formulas?</p>	<p>BI p. Pg. 29 Key Idea &amp; Example 3 &amp; 4 Key Point:</p> <ul style="list-style-type: none"> <li>• Focus on how to remove a fraction</li> <li>• Simplify to new equation fully</li> <li>• When to use decimals and when to use fractions</li> </ul>
5	<p><b>8.EE.7a QUIZ</b> <b>8.EE.7b QUIZ</b></p>		

# Classroom-Based Instruction Week at a Glance

## Week 4: Congruent Figures, Translations, Reflections, and Rotations



8.G.1 Verify experimentally the properties of translations.

8.G.2 Understand that a two dimensional figure is congruent to another if the second can be obtained from the first by a sequence of translations; given two congruent figures, describe a sequence that exhibits the congruence between them.

8.G.3 Describe the effect of translations on two-dimensional figures using coordinates.

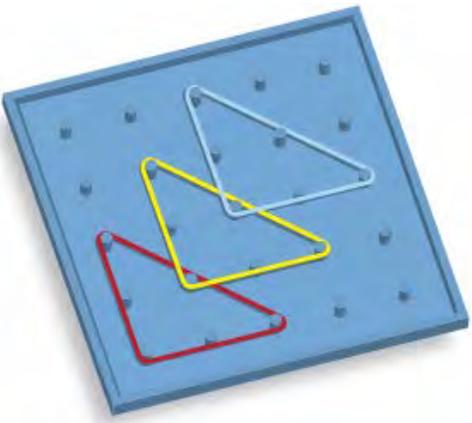
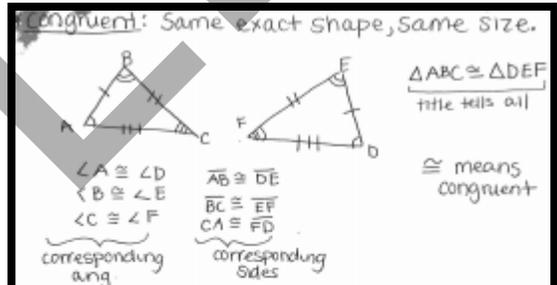
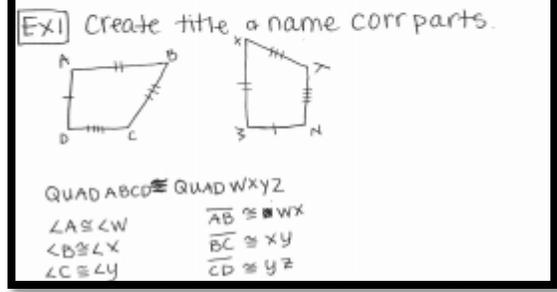
Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Small Group Instruction		
		35-45 minutes	10-15 minutes	30-45 minutes		
		<b>Lesson Cycle:</b> Engage – Problem – Discussion – Key Points	<b>At least 2 aligned problems</b>	<b>Independent Practice Problem Sets</b>	<b>Collaborative Problem Sets</b>	<b>Teacher Small Group</b>
<b>Day 1: BI Lesson 2.1: Congruent Figures</b> I can name corresponding angles and corresponding sides of congruent figures.  I can identify congruent figures.		<b>2.1 Pg. 42 – 45</b> <b>Problem:</b> Activity 1 <b>Discussion:</b> <i>How can you identify congruent triangles?</i> <b>Key Point:</b> Example 1 & 3	Pg. 44-45 "On Your Own" 1-3	BI pg. 7 #4-12	Pg. 7 #13-15	Pg. 7 #1-3
<b>Day 2: BI Lesson 2.2: Translations</b> I can identify translations.  I can translate figures in the coordinate plane.		<b>2.2 Pg. 48 - 49</b> <b>Problem1:</b> Activity 1 <b>Problem 2:</b> Activity 4 <b>Discussion:</b> What does it mean to translate? How do you get from one shape to the other? What is true about both shapes? <b>Key Point:</b> Example 1-3	Pg. 50 On your own #1-5	pg.52-53 # 10-16, 19-20	Pg. 53 #17-18, 21-23	Pg. 52 #1-9
<b>Day 3: BI Lesson 2.3: Reflections</b> I can identify reflections.  I can reflect figures in the x-axis or the y-axis of the coordinate plane		<b>2.3 Pg. 54 - 55</b> <b>Problem:</b> Example 1 <b>Discussion:</b> <i>How would you describe a reflection? What is true about both shapes?</i> <b>Key Point:</b> Examples 2-3	Pg. 57 "On Your Own" #4	Pg. 58 # 4-17	Pg. 59 #19-26	Pg. 58 #1-3 or RAP-J 2.3 Practice

<p><b>Day 4: Lesson 2.4: Rotations</b> I can identify rotations.</p> <p>I can rotate figures in the coordinate plane.</p>	<p><b>2.4 Pg. 60-62</b> <b>Problem 1: Activity 2</b> <b>Problem 2: Example 1</b> <b>Discussion:</b> What are the three basic ways to move an object on a plane? What happens to an object that has been turned on a coordinate plane? <b>Key Point:</b> Example 2 - 4</p>	<p>Pg. 64 Example 5 &amp; "On Your Own" #4-5</p>	<p>pg. 65-66 #7-25 odd</p>	<p>Pg. 66-67 #14-28 even</p>	<p>PG. 65 # 1-6</p>
<p>I can assess my understanding of transformations.</p>	<p><b>8.G.1, 8.G.2, 8.G.3 QUIZ</b></p>				

SAMPLE

# Introduction to New Material

## Week 4: Congruent Figures, Translations, Reflections, and Rotations

Day	Engage	Problem	Key Ideas
1	<p>Show:</p>  <p>Ask: What do you notice? What do you wonder?</p>	<p>BI p. Pg. 42 Essential Question and Activity 1 all</p> <p>Work with a partner.</p> <ul style="list-style-type: none"> <li>• Which of the geoboard triangles below are congruent to the geoboard triangle at the right?</li> <li>• Form each triangle on a geoboard.</li> <li>• Measure each side with a ruler. Record your results in a table.</li> <li>• Write a conclusion about the side lengths of triangles that are congruent.</li> </ul>  <p><b>Discussion:</b> How can you identify congruent triangles?</p>	<p>BI p.44-45 Key Ideas and Examles 1 and 3 (Skip 2) With an aditional NHA created Example</p> <div style="border: 1px solid black; padding: 5px;"> <p>congruent: Same exact shape, same size.</p>  <p>Ex1 Create title &amp; name corr parts.</p>  </div> <p>Ex 2 on anchor chart below is Example 3 from Big Ideas Pg. 45 Ex 3 on the anchor chart below is the added NHA example.</p>

**Ex 2** using Congruent Figures

$ABCD \cong JKLM$

What is the perimeter of JKLM

$\overline{LM} \cong \square$

$\overline{JM} \cong \square$

$\angle L \cong \square$

**Ex 3** Determining Congruent Triangles

Side-Side-Side (SSS)

Side-Angle-Side (SAS)

Angle-Side-Angle (ASA)

2

Show:

Ask:  
What do you notice? What do you wonder?

BI p. 48 -49  
**Activity 1 a-c**  
NOTE: Students will need tessellation blocks

Work with a partner. Can you make the tessellation by translating single tiles that are all of the same shape and design? If so, show how.

a. Sample:

Tile Pattern

Single Tiles

b.

c.

BI p.pg. 50-51 key vocabulary. Key Ideas & Activity 1-3

### Activity 4

**NOTE: students will need graph paper**

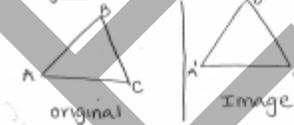
Work with a partner.

- Draw a rectangle in a coordinate plane. Find the dimensions of the rectangle.
- Move each vertex 3 units right and 4 units up. Draw the new figure. List the vertices.
- Compare the dimensions and the angle measures of the new figure to those of the original rectangle.
- Are the opposite sides of the new figure still parallel? Explain.
- Can you conclude that the two figures are congruent? Explain.
- Compare your results with those of other students in your class. Do you think the results are true for any type of figure?

### 2.2 Translations

\* Transformation: when you make changes to one figure to create a second figure. The new figure is called an Image.

\* Image: The result of a transformation



\* Translation to slide, move.

**EX1** Translating on a coordinate plane.

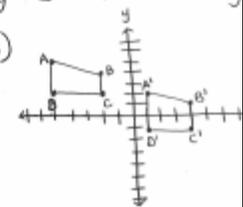
Note:  $\uparrow = y + \text{something}$   $\downarrow = y - \text{something}$

$\rightarrow = x + \text{something}$   $\leftarrow = x - \text{something}$

coordinate:  $(x, y) \rightarrow (x+b, y-3)$

Notation: words: right b, down 3

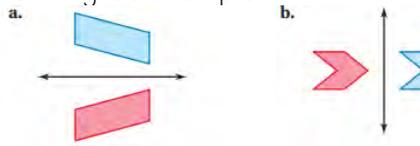
origin	Image
$A(5,5)$	$A'(1,2)$
$B(2,4)$	$B'(4,1)$
$C(-2,2)$	$C'(4,-1)$
$D(-5,2)$	$D'(1,-1)$



Shapes are congruent

Next:  $(x', y') \rightarrow (x-2, y')$

Show: Pg. 56 Example 1



Ask: What do you notice? What do you wonder?

BI p. 56 Example 1 & "On Your Own #1-3

Tell whether the blue figure is a reflection of the red figure.

a. The red figure can be *flipped* to form the blue figure. So, the blue figure is a reflection of the red figure.

b. If the red figure were *flipped*, it would point to the left. So, the blue figure is *not* a reflection of the red figure.

**On Your Own**

Tell whether the blue figure is a reflection of the red figure. Explain.

1.

2.

3.

BI p.57 Example 2 & 3

**Discussion:** How would you describe a reflection? What is true about both shapes?

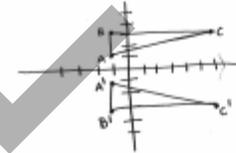
**2.3 Reflections**

\* **Reflection:** (Flip or mirror image) creates a mirror image of the original

\* **Line of reflection:** The line you flip a figure over to create a reflection



**EX1** Reflecting over x-axis (going from top to bottom)

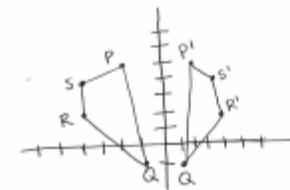


- \* y-coordinates become opposite.
- \* x-stays the same

original	Image
A(-1, 1)	A'(-1, -1)
B(-1, 3)	B'(-1, -3)
C(b, 3)	C(b, -3)

*(Note: A bracket indicates that the y-coordinates become opposite.)*

**EX2** Reflect over the y-axis

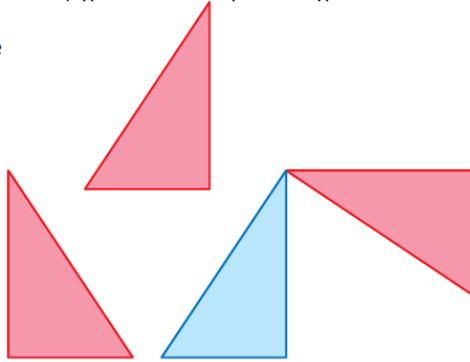


- \* x-coordinate becomes opposite
- \* y-stays the same

original	Image
P(-2, 5)	P'(2, 5)
Q(-1, -1)	Q'(1, -1)
R(-4, 2)	R'(4, 2)
S(-4, 4)	S'(4, 4)

Show: pg. 60 Activity 1 image

ue



Ask:  
What do you notice? What do you wonder?

4

BI p. 61 Activity 2

- NOTE: Need transparency paper

Activity 2:

Work with a partner.

- Draw a rectangle in Quadrant II of a coordinate plane. Find the dimensions of the rectangle.
- Copy the axes and the rectangle onto a piece of transparent paper. Align the origin and the vertices of the rectangle on the transparent paper with the coordinate plane. Turn the transparent paper so that the rectangle is in Quadrant I and the axes align. Draw the new figure in the coordinate plane. List the vertices.
- Compare the dimensions and the angle measures of the new figure to those of the original rectangle.
- Are the opposite sides of the new figure still parallel? Explain.
- Can you conclude that the two figures are congruent? Explain.
- Turn the transparent paper so that the original rectangle is in Quadrant IV. Draw the new figure in the coordinate plane. List the vertices. Then repeat parts (c)-(e).
- Compare your results with those of other students in your class. Do you think the results are true for any type of figure?

Pg. 62 Example 1

You must rotate the puzzle piece 270° clockwise about point P to fit it into a puzzle. Which piece fits in the puzzle as shown?



**Discussion:** What are the three basic ways to move an object on a plane? What happens to an object that has been turned on a coordinate plane?

Looking for:

- it stays the same shape and size/congruent
- The coordinates change, become opposite, etc...

BI p.62-64

Key Point:

- Key Ideas, Example 1- Example 4

**[2.4] Rotations**

\* Rotation: (a turn) a transformation that is turned around a point.

\* Angle of Rotation: 90°, 180°, 270°  
Clockwise or Counterclockwise

90° counter

90°

**90° clockwise:** rotate values y becomes opposite.

$(5, 7) \rightarrow (7, -5)$   
 $(-3, 4) \rightarrow (4, +3)$

**90° counter:** rotates values x becomes opposite.

$(5, 7) \rightarrow (-7, 5)$   
 $(-3, 4) \rightarrow (-4, -3)$

**[Ex 1] Rotating around the origin**

$w(-4, 2)$     $x(-3, 4)$     $y(-1, 4)$     $z(-1, 2)$   
 $w'(4, -2)$     $x'(3, -4)$     $y'(1, -4)$     $z'(1, -2)$

\* rotate values  
\* What becomes opposite?

**180° rotation (either way)**  
no rotation, opposite x & y

Rotate 180°/origin

$(5, 7) \rightarrow (-5, -7)$   
 $(-3, 4) \rightarrow (3, -4)$

**Ex2** Rotating around a point.

$J(1,2)$   $K(4,2)$   $L(1,-3)$  ~~90~~  
 $J'(-5,4)$   $K'(-5,0)$

\* L stays the same  
 \* Create a 90° from the point (either ← or →)  
 \* Count distances

create the 90° line

**90° clockwise**  
 \* create a 90° line behind

**90° counter**  
 \* create a 90° line forward

**180° either**  
 \* create a 180° line above or below point

a) 90° counter (origin)  
 - rotate values, x opp  
 $Q'(-5,4)$   $R'(0,4)$   $S'(0,1)$

b) 180° about S  
 (creates 180° lines from original)  
 $Q''(-2,-5)$   $R''(-2,0)$   $S''(1,0)$

c) how are Image 1 and Image 2 related?  
 (congruent)

**Ex3** More than 1 Transformation.

$A(-3,-3)$   $B(1,-3)$   $C(1,-5)$

a) Rotate 90° clockwise, then reflect over y-axis

$A(-3,-3)$	$A'(3,3)$	$A''(3,3)$
$B(1,-3)$	$B'(-3,-1)$	$B''(3,-1)$
$C(1,-5)$	$C'(-5,-1)$	$C''(5,-1)$

y stays same  
 x becomes opp.

# Classroom-Based Instruction Week at a Glance

## Week 5: Similar Figures and Perimeters and Areas of Similar Figures



8.G.4 Understand that a two-dimensional figure is similar to another if the second can be obtained from the first by a sequence of rotations, reflections, translations, and dilations; given two similar two-dimensional figures, describe a sequence that exhibits the similarity between them.

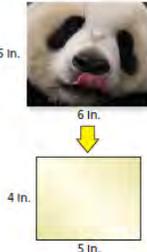
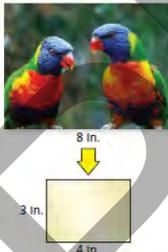
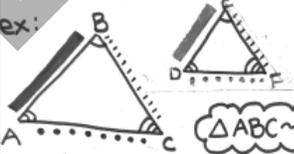
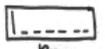
Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Small Group Instruction		
		35-45 minutes	10-15 minutes	30-45 minutes		
		<b>Lesson Cycle:</b> Engage – Problem – Discussion – Key Points	At least 2 aligned problems	Independent Practice Problem Sets	Collaborative Problem Sets	Teacher Small Group
<b>Day 1: BI Lesson 2.5 Similar Figures</b> I can name corresponding angles and corresponding sides of similar figures.  I can identify similar figures.  I can find unknown measures of similar figures.		<b>2.5 Pg. 70</b> <b>Problem:</b> Activity 1 <b>Discussion:</b> What strategies did you use to determine if the photos would end up distorted? How can proportions help in everyday life? <b>Key Point:</b> Example 1-2	Pg. 73 "On Your Own #2-3"	pg. 74 # 6-11	pg. 75 # 14-16	pg. 74 # 1-5 and mini-assessment on pg. T-25
<b>Day 2: BI Lesson 2.5 Similar Figures</b> I can name corresponding angles and corresponding sides of similar figures.  I can identify similar figures.  I can find unknown measures of similar figures.		<b>2.5 Pg. 73, 75</b> <b>Problem:</b> Pg. 75 #17 <b>Discussion:</b> What strategy did you use to solve? <b>Key Point:</b> Example 3	Pg. 73 "On Your Own" #4	Pg. 74 # 12-13 & RAP-J 2.5 Practice Pg.	Pg. 75 #18-20	Teacher choice based on student need
<b>Day 3: BI Lesson 2.6: Perimeters and Areas of Similar Figures</b> I can understand the relationship between perimeters of similar figures.  I can understand the relationship between <u>areas</u> of similar figures.  I can find ratios of perimeters and <u>areas</u> for similar figures.		<b>2.6 Pg. 76-79</b> <b>Problem:</b> Activity 1-3 <b>Discussion:</b> How does changing the area or perimeter of similar figures effect the side lengths? <b>Key Point:</b> Example 1 & 2	p.g 78 "On your Own" #1-2	Pg. 80 # 4-11	Pg. 80 # 12-13	Pg. 80 # 1-3

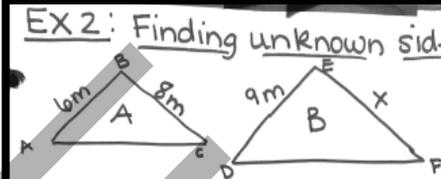
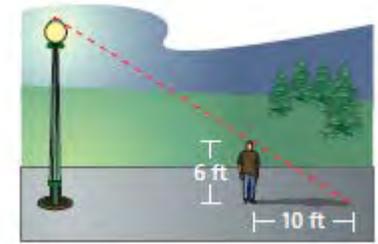
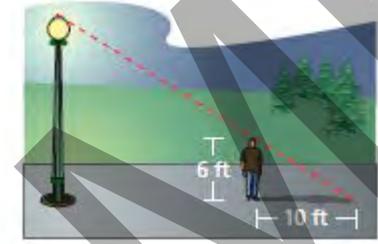
<p><b>Day 4: BI Lesson 2.6: Perimeters and Areas of Similar Figures</b>                  I can understand the relationship between perimeters of similar figures.</p> <p>I can understand the relationship between areas of similar figures.</p> <p>I can find ratios of perimeters and areas for similar figures.</p> <p>I can use proportions to find perimeters and areas of similar figures.</p>	<p><b>2.6</b> Pg. 76  <b>Problem:</b> Activity 3  <b>Discussion:</b> <i>Does it matter where the values go in the proportion?</i>  <b>Key Point:</b> Example 3</p>	<p>"On Your Own"                  Pg. 79 #3</p>	<p>Pg. 81 #14-15 &amp; Recourses by Chapter 2.6 Practice A all</p>	<p>Pg. 81 #17-20</p>	<p>Mini-assessment                  Pg. T-81</p>
<p>Day 5:                  I can demonstrate mastery on 8.EE.7a, 8.EE.7b, 8.G.1, 8.G.2, 8.G.3, 8.G.4</p>	<p style="text-align: center;"><b>Mid-Point Quiz</b>                  8.EE.7a, 8.EE.7b, 8.G.1, 8.G.2, 8.G.3, 8.G.4</p>				

SAMPLE

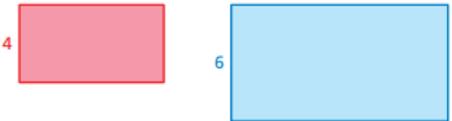
# Introduction to New Material

## Week 5: Similar Figures and Perimeters and Areas of Similar Figures

Day	Engage	Problem	Key Ideas										
1	<p>Show:</p>  <p>Original photograph</p> <p>Ask: What do you notice? What do you wonder?</p>	<p>BI p. 70 Activity 1</p> <p>Work with a partner. You are trying to reduce the photograph to the indicated size for a nature magazine. Can you reduce the photograph to the indicated size without distorting or cropping? Explain your reasoning.</p> <p>a. </p> <p>b. </p> <p><b>Discussion:</b> what strategies did you use to determine if the photos would end up distorted? How can proportions help in everyday life?</p>	<p>BI p.72 Key Idea, Example 1 &amp; 2</p> <ul style="list-style-type: none"> <li>Similar Figures</li> <li>Proportionate</li> </ul> <div data-bbox="1360 475 1969 1157" style="border: 1px solid black; padding: 5px;"> <p><b>* Similar Figures:</b> Same exact shape, different size.</p> <p>"<math>\sim</math>" = means Similar.</p> <p>- All angles are the same</p> <p>- side lengths are proportionate</p> <p>ex: </p> <p><math>\triangle ABC \sim \triangle DEF</math></p> <table border="0"> <tr> <td><u>Angles</u></td> <td><u>side lengths</u></td> <td rowspan="3">} When shapes are similar their side lengths are <u>proportionate</u></td> </tr> <tr> <td><math>\angle A \cong \angle D</math></td> <td><math>\overline{AB} \sim \overline{DE}</math></td> </tr> <tr> <td><math>\angle B \cong \angle E</math></td> <td><math>\overline{AC} \sim \overline{DF}</math></td> </tr> <tr> <td><math>\angle C \cong \angle F</math></td> <td><math>\overline{BC} \sim \overline{EF}</math></td> <td></td> </tr> </table> <p><b>EX1: Are we similar?</b></p> <p>*IF 2 Figures are similar, their sides are proportionate. Set up a proportion to see if they are similar.</p> <p>3  2  <math>\frac{3}{6} \stackrel{?}{=} \frac{2}{4}</math> <math>\frac{3}{6} \times \frac{2}{4} = \frac{6}{24}</math> <math>\frac{6(2)}{3} = \frac{12}{4}</math> <math>\frac{12}{4}</math></p> <p>does it work? <math>\frac{12}{4}</math></p> </div>	<u>Angles</u>	<u>side lengths</u>	} When shapes are similar their side lengths are <u>proportionate</u>	$\angle A \cong \angle D$	$\overline{AB} \sim \overline{DE}$	$\angle B \cong \angle E$	$\overline{AC} \sim \overline{DF}$	$\angle C \cong \angle F$	$\overline{BC} \sim \overline{EF}$	
<u>Angles</u>	<u>side lengths</u>	} When shapes are similar their side lengths are <u>proportionate</u>											
$\angle A \cong \angle D$	$\overline{AB} \sim \overline{DE}$												
$\angle B \cong \angle E$	$\overline{AC} \sim \overline{DF}$												
$\angle C \cong \angle F$	$\overline{BC} \sim \overline{EF}$												

			<p><b>EX 2: Finding unknown side lengths</b></p>  <p><math>\triangle ABC \sim \triangle DEF</math>      Triangle A is similar to Triangle B.      Find x.</p> <p>1) Set up a proportion.</p> <p><math>\overline{AB} \sim \overline{DE}</math> and <math>\overline{BC} \sim \overline{EF}</math> so...</p> <p><math>\frac{AB}{DE} = \frac{BC}{EF} \rightarrow \frac{6}{9} = \frac{8}{x}</math>     <math>\frac{8(9)}{6} = x</math></p> <p style="text-align: right;">Fish it!</p> <p style="text-align: right;"><math>\frac{72}{6} = 12</math></p> <p style="text-align: center;"><b>x = 12</b></p>
<p>2</p>	<p>Show: Pg. 75 #17 STREETLIGHT image</p>  <p>Ask:          What do you notice? What do you wonder?</p>	<p>BI p.75 #17 Streetlight</p>  <p>A person standing 20 feet from a street light casts a shadow as shown. How many times taller is the streetlight than the person? Assume the triangles are similar.</p> <p><b>Discussion:</b> what strategy did you use? What mistakes did you make? what are some misconceptions when solving this problem?</p>	<p>BI p.73 Example 3          Create Proportions</p> <p><b>EXAMPLE 3 Real-Life Application</b></p>  <p>An artist draws a replica of a painting that is on the Berlin Wall. The painting includes a red trapezoid. The shorter base of the similar trapezoid in the replica is 3.75 inches. What is the height <math>h</math> of the trapezoid in the replica?</p> <p>Because the trapezoids are similar, corresponding side lengths are proportional. So, write and solve a proportion to find <math>h</math>.</p> <p><math>\frac{3.75}{15} = \frac{h}{12}</math>     Write a proportion.</p> <p><math>12 \cdot \frac{3.75}{15} = 12 \cdot \frac{h}{12}</math>     Multiplication Property of Equality</p> <p><math>3 = h</math>     Simplify.</p> <p>So, the height of the trapezoid in the replica is 3 inches.</p> 

Show:



Ask:  
What do you notice? What do you wonder?

BI p. 76 Activities 1-3  
Materials: Pattern blocks

Work with a partner. Use pattern blocks to make a figure whose dimensions are 2, 3, and 4 times greater than those of the original figure.



**Reminders:** How do you find perimeter? Area? See Pg. T-76 for additional guiding questions during the activity.

Work with a partner. Copy and complete the table for the perimeter  $P$  of each figure in Activity 1. Describe the pattern.

Figure	Original Side Lengths	Double Side Lengths	Triple Side Lengths	Quadruple Side Lengths
	$P =$ 			
	$P =$ 			

Work with a partner. Copy and complete the table for the area  $A$  of each figure in Activity 1. Describe the pattern.

Figure	Original Side Lengths	Double Side Lengths	Triple Side Lengths	Quadruple Side Lengths
	$A =$ 			
	$A =$ 			

**Discussion:**

- How does changing the area or perimeter of similar figures effect the side lengths?
- What information do you need to know to find the dimensions of a figure that is similar to another figure? (#5-6 on Pg. 77 "What's Your Answer?")

BI p. 78-79 Key Idea & Example 1 and Key Idea and Example 2

**Common Misconception:** Ratio order matters ie: Red to blue, not Blue to red, etc...

2.6 Ratios of Perimeters & Areas of Similar Figures  
Notes: From Pg. 78 + 79

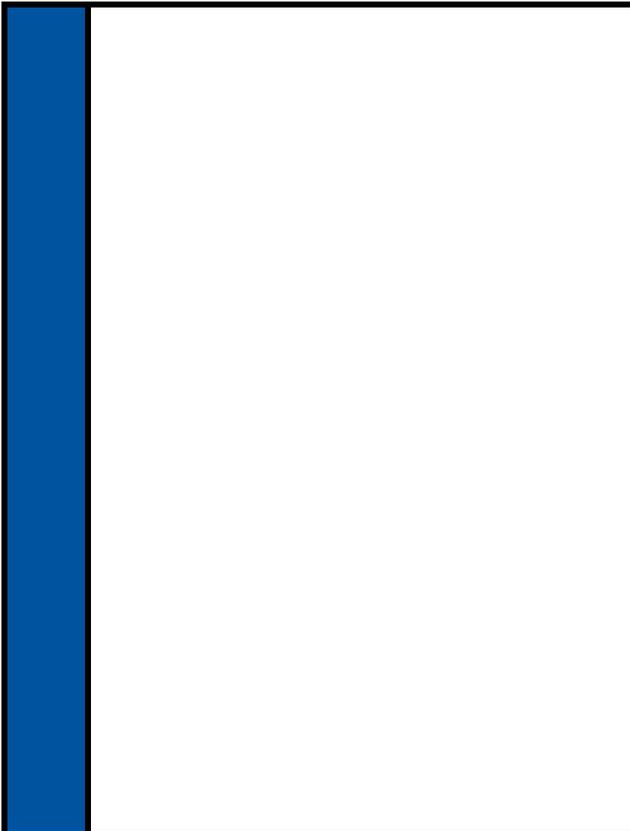
EX1 Ratio of Perimeters

\* When 2 figures are similar, the ratio of their perimeters are equal to the ratio of the side lengths.



Quad ABCD ~ Quad EFGH so,  $\overline{AB} \sim \overline{EF}$   
so,  $\frac{4in}{3in} = \frac{2in}{3in}$  ← simplify  
create the ratio

\* Therefore the ratio of the sides is  $\frac{2in}{3in}$  → That means the ratio of the perimeter is also  $\frac{2in}{3in}$



**EX1: Practice**

1) What is the ratio of Figure A to Figure B? What is the ratio of Figure A's perimeter to figure B's perimeter?

$\frac{A}{B} = \frac{21}{15} = \frac{7}{5}$  so perimeter ratio =  $\frac{7}{5}$

\* why not  $\frac{5}{7}$ ? (wants A to B, NOT B to A.)

**EX2: Ratio of Areas (of similar figures)**

\* When 2 figures are similar, the ratio of their areas is equal to the square of the ratio of its sides.

ex:

Sides: small  $\Delta$ :  $\frac{6}{10} = \frac{3}{5}$   
 Big  $\Delta$ :  $\frac{10}{6} = \frac{5}{3}$

Area:  $(\frac{3}{5})^2 = \frac{9}{25}$  ratio of the Areas  
 Square the ratio

Show:

Ask:  
 What do you notice? What do you wonder?

BI p. 77 Activity 4

BI p. 79 Example 3

**EX3** Using ratios/proportions to find actual Areas & Perimeters.

\* The swimming pool is similar to the volleyball court.

Area:  $200 \text{ yds}^2$   
 perimeter:  $60 \text{ yds}$

swimming pool: A: ? P: ?



# Classroom-Based Instruction Week at a Glance

## Week 6: Dilations



8.G.3 Describe the effect of dilations on two-dimensional figures using coordinates.

8.G.4 Understand that a two-dimensional figure is similar to another if the second can be obtained from the first by a sequence of rotations, reflections, translations, and dilations; given two similar two-dimensional figures, describe a sequence that exhibits the similarity between them.

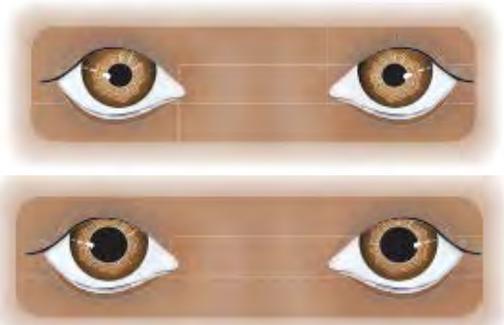
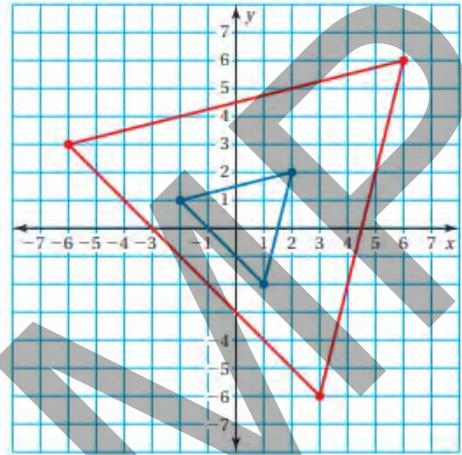
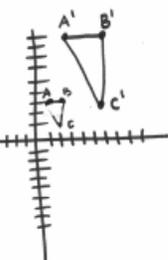
Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Small Group Instruction		
		35-45 minutes	10-15 minutes	30-45 minutes		
		<b>Lesson Cycle:</b> Engage – Problem – Discussion – Key Points	At least 2 aligned problems	Independent Practice Problem Sets	Collaborative Problem Sets	Teacher Small Group
<b>Day 1: BI Lesson 2.7: Dilations</b> I can define dilations. I can identify dilations.		2.7 pg. 82-86 <b>Problem:</b> Activity 1 Pg. 82 <b>Discussion:</b> How are the two triangles related? Did the size and shape of an object change when we perform a translation, reflection or rotation? <b>Key Point:</b> Example 1 & 2	Pg. 84-85 "On Your Own" #1-3	Pg. 87 #4-13, 16		Pg. 87 #1-3
<b>Day 2: BI Lesson 2.7: Dilations</b> I can identify dilations. I can dilate figures in the coordinate plane.		2.7 pg. 85 <b>Problem:</b> Example 3 <b>Discussion:</b> How can you enlarge or reduce a figure in the coordinate plane? <b>Key Point:</b> Example 4	"On Your Own" # 4-5	Pg. 87-88 #14, 15, 17, 19, 23, 25	Pg. 87-88 #18, 24, 26, 30	Teacher choice based on student need
<b>Day 3: BI Lesson 2.7 Dilations</b> I can use more than one transformation to find images of figures.		2.7 pg. 83 <b>Problem:</b> Activity 3 <b>Discussion:</b> How could enlarging or reducing a figure be helpful in careers? Explain... <b>Key Point:</b> Example 5	"On your Own" #6	Pg. 88 #20-22, 27-29	Pg. 88 #33-36	Mini-Assessment pg. T-89

<p><b>Day 4: BI Lesson 2.7 Dilations</b> I can use more than one transformation to find images of figures.</p>	<p><b>2.7 pg. 89</b> <b>Problem: #32 Reasoning</b> <b>Discussion:</b> Is there more than one way to get from an original picture to the resulting image? Prove it.</p>	<p>n/a</p>	<p><i>Recourses by</i> <i>Chapter 2.7</i> <i>Practice B</i></p>	<p><i>2.5-2.7 Practice</i> <i>Quiz BI Pg. 90</i></p>	<p><i>RAP-J 2.7</i> <i>Practice</i></p>
<p><b>Day 5: BI Lesson 2.7 Dilations</b></p>	<p><b>Whiteboard Review Pg. 95 #25-29</b></p>	<p><b>8.G.3 QUIZ</b> <b>8.G.4 QUIZ</b></p>			

SAMPLE

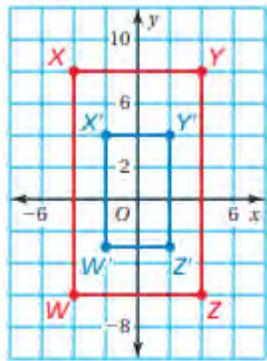
# Introduction to New Material

## Week 6: Dilations

Day	Engage	Problem	Key Ideas						
1	<p>Show:</p>  <p>Ask: What do you notice? What do you wonder?</p>	<p><b>BI p. Activity 1</b> Work with a partner. Write the coordinates of the vertices of the blue triangle. Then write the coordinates of the vertices of the red triangle.</p> <ol style="list-style-type: none"> <li>How are the two sets of coordinates related?</li> <li>How are the two triangles related? Explain your reasoning.</li> </ol> <p>Note: looking for similar: same shape, different size.</p>  <ol style="list-style-type: none"> <li>Draw a green triangle whose coordinates are twice the values of the corresponding coordinates of the blue triangle. How are the green and blue triangles related? Explain your reasoning.</li> <li>How are the coordinates of the red and green triangles related? How are the two triangles related? Explain your reasoning.</li> </ol> <p><b>Discussion:</b> How are the two triangles related? Did the size and shape of an object change when we perform a translation, reflection or rotation?</p>	<p>BI p.84 Key vocabulary, Key Ideas, Example 1 and Example 2</p> <p>Vocab:</p> <ul style="list-style-type: none"> <li>Dilation</li> <li>Center of dilation</li> <li>Scale factor</li> </ul> <p>* <b>Dilation:</b> means to enlarge or shrink a figure. - a dilation is similar to the original figure.</p> <p>ex:  or </p> <p>* <b>Scale Factor or k:</b> tells you how much to enlarge or shrink the figure.</p> <p>ex: <math>k=3</math> means to blow up the figure 3 times <math>k=\frac{1}{2}</math> means to shrink the figure.</p> <p><b>EX1 Dilate a Figure</b></p> <table border="0"> <tr> <td><math>A(1,3)</math></td> <td><math>A'(3,9)</math></td> </tr> <tr> <td><math>B(2,3)</math></td> <td><math>B'(6,9)</math></td> </tr> <tr> <td><math>C(2,1)</math></td> <td><math>C'(6,3)</math></td> </tr> </table> <p><math>k=3 \rightarrow</math> Multiply all #s by 3 Just multiply all # by 3 to get new coordinates.</p> 	$A(1,3)$	$A'(3,9)$	$B(2,3)$	$B'(6,9)$	$C(2,1)$	$C'(6,3)$
$A(1,3)$	$A'(3,9)$								
$B(2,3)$	$B'(6,9)$								
$C(2,1)$	$C'(6,3)$								

2

Show:



Ask:  
What do you notice? What do you wonder?

BI p. 85 Example 3 Dilating a figure  
**Draw the image of rectangle WXYZ after a dilation with a scale factor of 0.5. Identify the type of dilation.**

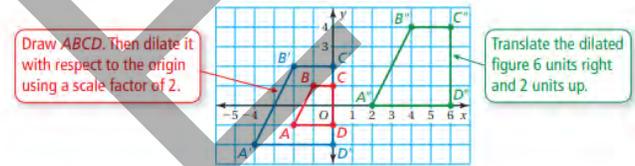
**Vertices of WXYZ**

- W(-4, -6)
- X(-4, 8)
- Y(4, 8)
- Z(4, -6)

**Discussion:** How can you enlarge or reduce a figure in the coordinate plane? How can you tell the difference between an enlargement or a reduction?

BI p.86 Example 4  
Remind students the importance of labeling the images and tracking the coordinates in a table.

The vertices of a trapezoid are  $A(-2, -1)$ ,  $B(-1, 1)$ ,  $C(0, 1)$ , and  $D(0, -1)$ . Dilate the trapezoid with respect to the origin using a scale factor of 2. Then translate it 6 units right and 2 units up. What are the coordinates of the image?



The coordinates of the image are  $A''(2, 0)$ ,  $B''(4, 4)$ ,  $C''(6, 4)$ , and  $D''(6, 0)$ .

The image of a translation, reflection, or rotation is congruent to the original figure, and the image of a dilation is similar to the original figure. So, two figures are similar when one can be obtained from the other by a sequence of translations, reflections, rotations, and dilations.

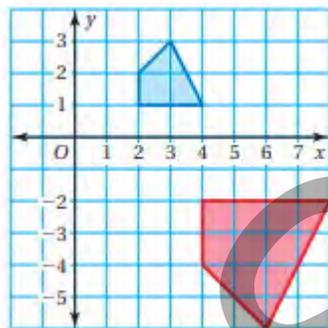
**Example of using a table to organize the coordinates and the image "name".**

- Set up a table to organize the vertices, then draw each trapezoid.

Vertices of ABCD	Vertices of A' B' C' D'	Vertices of A'' B'' C'' D''
$A(-2, -1)$	$A'(-4, -2)$	$A''(2, 0)$
$B(-1, 1)$	$B'(-2, 2)$	$B''(4, 4)$
$C(0, 1)$	$C'(0, 2)$	$C''(6, 4)$
$D(0, -1)$	$D'(0, -2)$	$D''(6, 0)$

3

Show: Image from Pg.



Ask:  
What do you notice? What do you wonder?

BI p. 83 Activity 3  
Work with a partner. Make a table that summarizes the relationships between the original figure and its image for all four types of transformations.

- Students should be thinking about sides, angles, size, shape, orientation, etc...

BI p. 86 Example 5 (Describing a sequence of transformations)

- Show students a step by step, drawing out each transformation.
- Might be beneficial to show multiple ways
- Have students identify the scale factor and how they know

		<p>Ex:</p> <table border="1"> <tr> <td>Translation</td> <td>same size and shape, slides left, right, up and/or down</td> </tr> <tr> <td>Reflection</td> <td>same size and shape, mirror image of original</td> </tr> <tr> <td>Rotation</td> <td>same size and shape, rotated about a point</td> </tr> <tr> <td>Dilation</td> <td>different size, same shape, the image is an enlargement or reduction of the original</td> </tr> </table>	Translation	same size and shape, slides left, right, up and/or down	Reflection	same size and shape, mirror image of original	Rotation	same size and shape, rotated about a point	Dilation	different size, same shape, the image is an enlargement or reduction of the original	<p>The red figure is similar to the blue figure. Describe a sequence of transformations in which the blue figure is the image of the red figure.</p> <p>From the graph, you can see that the blue figure is one-half the size of the red figure. So, begin with a dilation with respect to the origin using a scale factor of <math>\frac{1}{2}</math>.</p> <p>After dilating, you need to flip the figure in the <math>x</math>-axis.</p> <p>So, one possible sequence of transformations is a dilation with respect to the origin using a scale factor of <math>\frac{1}{2}</math> followed by a reflection in the <math>x</math>-axis.</p>
Translation	same size and shape, slides left, right, up and/or down										
Reflection	same size and shape, mirror image of original										
Rotation	same size and shape, rotated about a point										
Dilation	different size, same shape, the image is an enlargement or reduction of the original										
<p>4</p>	<p>Show:</p> <p>Ask: What do you notice? What do you wonder?</p>	<p>BI Pg. 89 #32 Reasoning</p> <p><b>A triangle is dilated using a scale factor of 3. The image is then dilated using a scale factor of 0.5. What scale factor could you use to dilate the original triangle to get the final image of the triangle? Explain.</b></p> <p><i>**Encourage students to graph the dilations and/or use a table to model with mathematics.</i></p> <p><b>Discussion:</b> Is there more than one way to get from an original picture to the resulting image? Prove it.</p>	<p>No new Key Points, extra student practice to prepare for the quiz.</p> <table border="1"> <thead> <tr> <th>Individual</th> <th>Group</th> <th>Small group</th> </tr> </thead> <tbody> <tr> <td>Recourses by Chapter 2.7 Practice B</td> <td>2.5-2.7 Practice Quiz BI Pg. 90</td> <td>RAP-J 2.7 Practice</td> </tr> </tbody> </table>	Individual	Group	Small group	Recourses by Chapter 2.7 Practice B	2.5-2.7 Practice Quiz BI Pg. 90	RAP-J 2.7 Practice		
Individual	Group	Small group									
Recourses by Chapter 2.7 Practice B	2.5-2.7 Practice Quiz BI Pg. 90	RAP-J 2.7 Practice									
<p>5</p>		<p>Whiteboard Review Pg. 95 # 25-29</p> <p>Tell whether the blue figure is a dilation of the red figure.</p> <p>25. </p> <p>26. </p> <p>The vertices of a figure are given. Draw the figure and its image after a dilation with the given scale factor. Identify the type of dilation.</p> <p>27. <math>P(-3, -2), Q(-3, 0), R(0, 0); k = 4</math></p> <p>28. <math>B(3, 3), C(3, 6), D(6, 6), E(6, 3); k = \frac{1}{3}</math></p> <p>29. The vertices of a rectangle are <math>Q(-6, 2), R(6, 2), S(6, -4),</math> and <math>T(-6, -4)</math>. Dilate the rectangle with respect to the origin using a scale factor of <math>\frac{3}{2}</math>. Then translate it 5 units right and 1 unit down. What are the coordinates of the image?</p>	<p>8.G.3, 8.G.4 QUIZ</p>								

# Classroom-Based Instruction Week at a Glance

## Week 7: Angles and Triangles



8.G.5 Use informal arguments to establish facts about the angles created when parallel lines are cut by a transversal, and the angle-angle criterion for similarity of triangles.

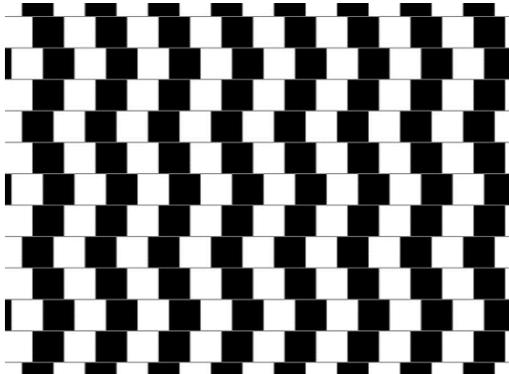
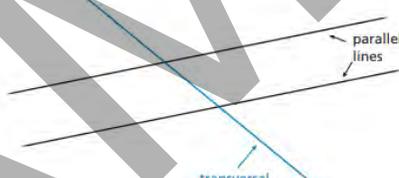
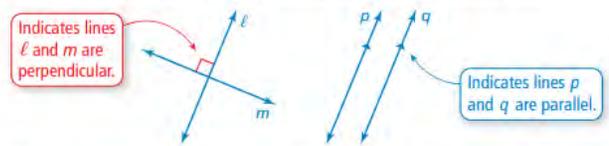
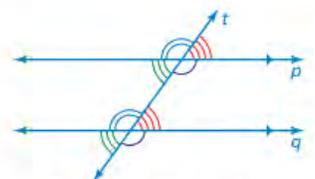
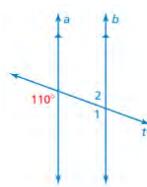
Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Small Group Instruction		
		35-45 minutes	10-15 minutes	30-45 minutes		
		<b>Lesson Cycle:</b> Engage – Problem – Discussion – Key Points	At least 2 aligned problems	Independent Practice Problem Sets	Collaborative Problem Sets	Teacher Small Group
<b>Day 1: BI Lesson 3.1: Parallel Lines and Transversals</b> I can define parallel lines, perpendicular lines, and a transversal. I can identify the angles formed when parallel lines are cut by a transversal. I can find the measures of angles formed when parallel lines are cut by a transversal		<b>3.1 Angles</b> Pg. 102-106 <b>Problem:</b> Pg. 102-103 Activity 1 and 2 <b>Discussion:</b> What is true about parallel lines? Which angles in Activity 1 have equal measures and how do you know? <b>Key Point:</b> Example 1 & 2	Pg. 104-105 "On Your Own" # 1-3	Pg. 107 # 3-12	Pg. 108 #13-14	Pg. 107 #1-2
<b>Day 2: : Lesson 3.1: Parallel Lines and Transversals</b> I can find the measures of angles formed when parallel lines are cut by a transversal.  I can use corresponding angles to find angle measures.  I can identify interior and exterior angles.		<b>3.1 Angles</b> Pg. 102-106 <b>Problem:</b> Activity 3 <b>Discussion:</b> Is it possible to find unknown angles without a protractor? <b>Key Point:</b> Example 3 & 4	Pg. 106 "On Your Own" # 4-7	Pg. 108 #15-26	Pg. 109 #27-30	Mini-Assessment Pg. T-109
<b>Day 3: BI Lesson</b>  I can understand that the sum of the interior angle measures of a triangle is $180^\circ$ .  I can find the measures of interior and exterior angles of triangles.		<b>3.2 Interior angles</b> Pg. 110 <b>Problem:</b> Activity 1 & 2 <b>Discussion:</b> How can you describe the relationship among the angles in a triangle? <b>Key Point:</b> Key Idea & Example 1	Pg. 112 "On Your Own" #1-2	Pg. 114 # 4-11	NA	Pg. 114 # 1-3

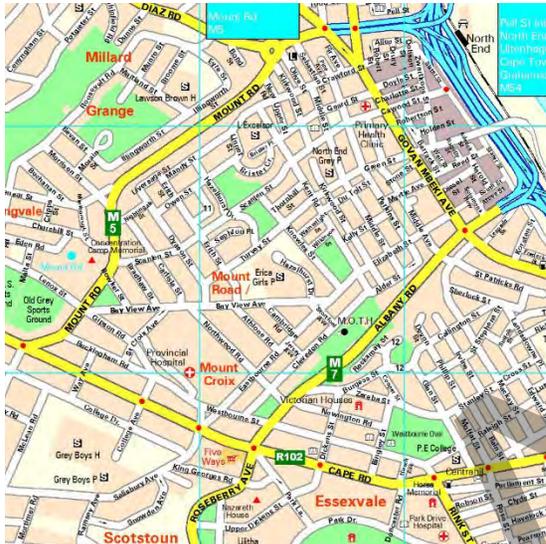
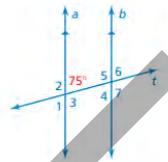
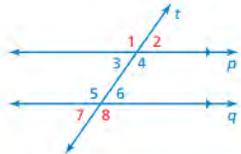
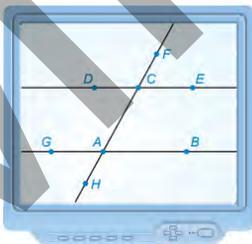
<p>Day 4: <b>BI Lesson 3.2: Angles of Triangles</b>                  I can understand that the sum of the interior angle measures of a triangle is <math>180^\circ</math>.</p> <p>I can find the measures of interior and exterior angles of triangles.</p>	<p><b>3.2 Exterior angles</b>  <b>Problem:</b> Pg. 111 Activity 3 and 4  <b>Discussion:</b> What do you notice about the exterior angles of a triangle? Are they at all related to the interior angles?  <b>Key Point:</b> Example 2 &amp; 3</p>	<p>Pg. 113 "On You Own" #3-5</p>	<p>Pg. 115 #12-18</p>	<p>#19-22</p>	<p>Teacher choice based on student need</p>
<p>Day 5: <b>BI Lesson 3.2: Angles of Triangles</b>                  I can assess my understanding of parallel lines, transversals and finding unknown interior and exterior angles in a triangle.</p>	<p>Pg. T-115 Mini-Assessment Review</p>	<p><b>8.G.5 QUIZ</b></p>			

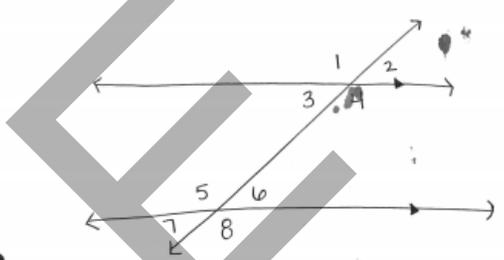
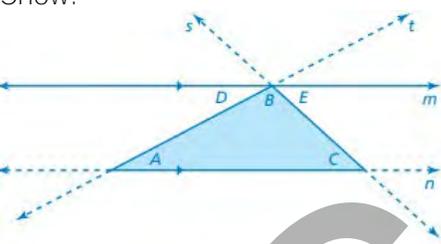
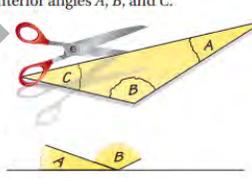
SAMPLE

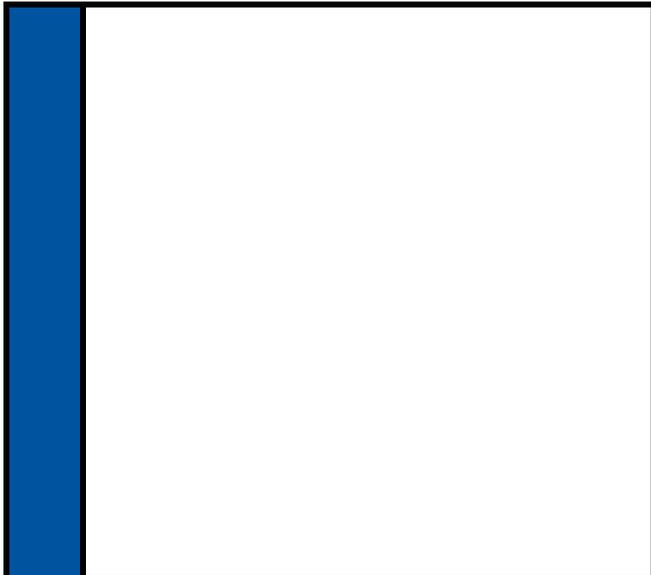
# Introduction to New Material

## Week 7: Transversals, Parallel Lines, and Triangles

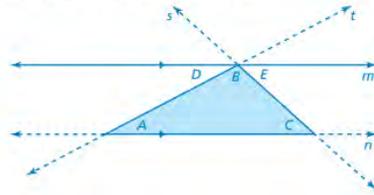
Day	Engage	Problem	Key Ideas
1	<p>Show:</p>  <p>(Believe it or not, these lines are all parallel!)</p> <p>Ask: What do you notice? What do you wonder?</p>	<p><i>BI 2.1 Transversals &amp; Parallel lines</i> <i>PG.102-106</i></p> <p><b>Problem:</b> Pg. 102-103 Activity 1 and 2 <i>Note: Students will need rulers</i></p> <ol style="list-style-type: none"> <li><b>Discuss what it means for two lines to be parallel. Decide on a strategy for drawing two parallel lines, then draw the two parallel lines.</b> <ul style="list-style-type: none"> <li>*Looking for two lines that as the same distance, so they will never intersect/touch.</li> </ul> </li> <li><b>Now, draw a third line that intersects the two parallel lines. This third line is called a Transversal.</b></li> </ol>  <p><b>EX:</b></p> <p><b>Discussion:</b></p> <ol style="list-style-type: none"> <li>How many angles are formed when the parallel lines are intersected by the transversal?</li> <li>Which angles in Activity 1 have equal measures and how do you know?</li> </ol>	<p>BI pg. 104-105 Key vocabulary, Key ideas &amp; Example 1 and Example 2.</p> <p><b>Review past vocab:</b> supplementary, complementary, vertical angles</p> <p><b>Key Vocab:</b></p> <ul style="list-style-type: none"> <li>Transversal</li> <li>Corresponding angles</li> <li>Interior and exterior angles</li> </ul> <p>Lines in the same plane that do not intersect are called <i>parallel lines</i>. Lines that intersect at right angles are called <i>perpendicular lines</i>.</p>  <p>A line that intersects two or more lines is called a <b>transversal</b>. When parallel lines are cut by a transversal, several pairs of congruent angles are formed.</p> <p><b>Corresponding Angles</b></p> <p>When a transversal intersects parallel lines, corresponding angles are congruent.</p>  <p><b>Corresponding angles</b></p> <p>Use the figure to find the measures of (a) <math>\angle 1</math> and (b) <math>\angle 2</math>.</p> <ol style="list-style-type: none"> <li><math>\angle 1</math> and the <math>110^\circ</math> angle are corresponding angles. They are congruent.             <ul style="list-style-type: none"> <li>So, the measure of <math>\angle 1</math> is <math>110^\circ</math>.</li> </ul> </li> <li><math>\angle 1</math> and <math>\angle 2</math> are supplementary.             <ul style="list-style-type: none"> <li><math>\angle 1 + \angle 2 = 180^\circ</math>      Definition of supplementary angles</li> <li><math>110^\circ + \angle 2 = 180^\circ</math>      Substitute <math>110^\circ</math> for <math>\angle 1</math>.</li> <li><math>\angle 2 = 70^\circ</math>      Subtract <math>110^\circ</math> from each side.</li> <li>So, the measure of <math>\angle 2</math> is <math>70^\circ</math>.</li> </ul> </li> </ol> 

			 <p>Use the figure to find the measures of the numbered angles.</p> <p><math>\angle 1</math>: <math>\angle 1</math> and the <math>75^\circ</math> angle are vertical angles. They are congruent.</p> <p>So, the measure of <math>\angle 1</math> is <math>75^\circ</math>.</p> <p><math>\angle 2</math> and <math>\angle 3</math>: The <math>75^\circ</math> angle is supplementary to both <math>\angle 2</math> and <math>\angle 3</math>.</p> $75^\circ + \angle 2 = 180^\circ$ <p style="text-align: right;">Definition of supplementary angles</p> $\angle 2 = 105^\circ$ <p style="text-align: right;">Subtract <math>75^\circ</math> from each side.</p> <p>So, the measures of <math>\angle 2</math> and <math>\angle 3</math> are <math>105^\circ</math>.</p> <p><math>\angle 4, \angle 5, \angle 6,</math> and <math>\angle 7</math>: Using corresponding angles, the measures of <math>\angle 4</math> and <math>\angle 6</math> are <math>75^\circ</math>, and the measures of <math>\angle 5</math> and <math>\angle 7</math> are <math>105^\circ</math>.</p> <p>When two parallel lines are cut by a transversal, four <b>interior angles</b> are formed on the inside of the parallel lines and four <b>exterior angles</b> are formed on the outside of the parallel lines.</p>  <p><math>\angle 3, \angle 4, \angle 5,</math> and <math>\angle 6</math> are interior angles.  <math>\angle 1, \angle 2, \angle 7,</math> and <math>\angle 8</math> are exterior angles.</p>
<p>2</p>	<p>Show:</p> <p>(Or any picture that shows the top view of intersecting streets)</p> <p>Ask:          What do you notice? What do you wonder?</p>	<p>3.1 Angles BI Pg. 102-106  <b>Problem:</b> Activity 3</p> <p><b>Note:</b> Students will need rulers and protractors. Students may need a reminder on how to use a protractor before beginning that activity.</p> <p>Work with a partner. Use geometry software to draw two parallel lines intersected by a transversal.</p> <ol style="list-style-type: none"> <li>Find all the angle measures.</li> <li>Adjust the figure by moving the parallel lines or the transversal to a different position. Describe how the angle measures and relationships change.</li> </ol>  <p><b>Discussion:</b> Is it possible to find unknown angles without a protractor? Explain...</p>	<p>BI p. 105-106  <b>Key Vocabulary, Key ideas, Example 3 and Example 4</b>  <b>Vocab:</b> Alternate interior, alternate exterior</p>

			<p><b>EX 3</b> Parallel Lines + Transversals</p>  <p><u>Corresponding Angles</u>: an angle from 1 line that corresponds w/ the same <math>\angle</math> from the other line. (They are congruent)</p> <p><math>\angle 1 = \angle 5</math>  <math>\angle 3 = \angle 7</math>  <math>\angle 2 = \angle 6</math>  <math>\angle 4 = \angle 8</math></p> <p><u>Alternate Interior <math>\angle</math></u>: opposite <math>\angle</math> on the inside of the // lines are =.</p> <p><del>Opposite</del> <math>\angle 3 = \angle 6</math>  <math>\angle 5 = \angle 4</math></p> <p><u>Alternate Exterior</u>: opposite <math>\angle</math> on the outside of the // lines are =.</p> <p><math>\angle 1 = \angle 8</math>  <math>\angle 7 = \angle 2</math></p>
<p>3</p>	<p>Show:</p>  <p>The goal is to investigate and recall triangles and features of triangles.</p> <p>Ask:          What do you notice? What do you wonder?</p>	<p>Bl p.110 Activity 1          Students will need paper and scissors.</p> <p><b>Work with a partner.</b></p> <ol style="list-style-type: none"> <li>Draw a triangle. Label the interior angles A, B, and C.</li> <li>Carefully cut out the triangle. Tear off the three corners of the triangle.</li> <li>Arrange angles A and B so that they share a vertex and are adjacent.</li> <li>How can you place the third angle to determine the sum of the measures of the interior angles? What is the sum?</li> <li>Compare your results with those of others in your class.</li> <li><b>STRUCTURE</b> How does your result in part (d) compare to the rule you wrote in Lesson 1.1, Activity 2?</li> </ol>  <p><b>Activity 2</b></p>	<p>Bl p. 112 Example 1 and key ideas          Review types of angles and types of triangles</p> <ul style="list-style-type: none"> <li>Right, obtuse, acute</li> <li>Scalene, equilateral, isosceles.</li> </ul>



- a. Describe the figure.
- b. **LOGIC** Use what you know about parallel lines and transversals to justify your result in part (d) of Activity 1.



**Discussion:** How can you describe the relationship among the angles in a triangle?

Note: ALL Triangles have 180° ALWAYS!

\* Interior Angles: The angles on the inside of a triangle (polygon).

$a + b + c = 180^\circ$

a) 
$$32 + 48 + x = 180$$

$$x + 80 = 180$$

$$- 80 \quad - 80$$

$$m\angle x = 100^\circ$$

b) 
$$x + 28 + x + 90 = 180$$

$$2x + 118 = 180$$

$$2x = 62$$

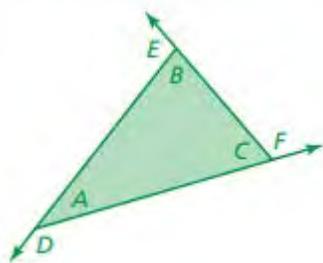
$$x = 31^\circ$$

$$m\angle A = 59^\circ$$

$$m\angle B = 90^\circ$$

$$m\angle C = 31^\circ$$

Show:



Ask:  
4 What do you notice? What do you wonder?

Bl p. 111-113 **3.2 Exterior angles**  
**Problem:** Pg. 111 Activity 3 and 4  
Exploring and measuring **EXTERIOR** angles.

**Activity 3:**

Work with a partner.

- a. Draw a triangle. Label the interior angles A, B, and C.
- b. Carefully cut out the triangle.
- c. Place the triangle on a piece of paper and extend one side to form exterior angle D, as shown.
- d. Tear off the corners that are not adjacent to the exterior angle. Arrange them to fill the exterior angle, as shown. What does this tell you about the measure of exterior angle D?

**Activity 4**

Work with a partner.

- a. Draw a triangle and label the interior and exterior angles, as shown.
- b. Use a protractor to measure all six angles. Copy and complete the table to organize your results. What does the table tell you about the measure of an exterior angle of a triangle?

Exterior Angle	D = $^\circ$	E = $^\circ$	F = $^\circ$
Interior Angle	B = $^\circ$	A = $^\circ$	A = $^\circ$
Interior Angle	C = $^\circ$	C = $^\circ$	B = $^\circ$

**Discussion:** What do you notice about the exterior angles of a triangle? Are they at all related to the interior angles?

Bl p. Pg. 112 (Exterior angles)  
Key Idea & Example 2 and 3

Exterior: When lines of a triangle are extended it creates Angles on the outside of a shape, called exterior angles.

2 Ways:

1) Find x.  

$$36 + 72 + y = 180$$

$$108 + y = 180$$

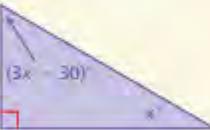
$$y = 72^\circ$$
 If  $y = 72^\circ$ ,  $x + y$  are supplementary so  $180 = 72 + x$   

$$x = 108^\circ$$

2nd way  
 The measure of an exterior  $\angle$  = the 2 non adjacent angles added together.  

$$36 + 72 = x$$

$$x = 108^\circ$$

5	<p>Show:</p> <p><b>Mini-Assessment</b> Find the value of <math>x</math>.</p> <p>1. </p> <p>63</p> <p>2. </p> <p>60</p> <p>3. </p> <p>30</p> <p>Find the measure of the exterior angle.</p> <p>4. </p> <p>141°</p> <p>5. </p>		<p><b>8.G.5 QUIZ</b></p>
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Ask:  
What do you notice? What do you wonder?

# Classroom-Based Instruction Week at a Glance

## Week 8: Angles of Polygons and Using Similar Triangles



**8.G.5** Use informal arguments to establish facts about the angles created when parallel lines are cut by a transversal, and the angle-angle criterion for similarity of triangles

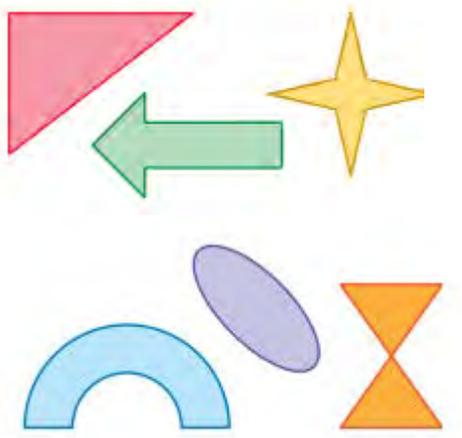
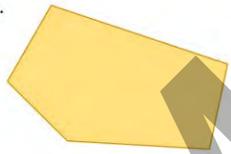
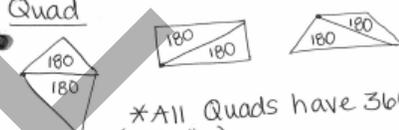
Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Small Group Instruction		
		35-45 minutes	10-15 minutes	30-45 minutes		
		Lesson Cycle: Engage – Problem – Discussion – Key Points	At least 2 aligned problems	Independent Practice Problem Sets	Collaborative Problem Sets	Teacher Small Group
<b>Day 1: BI Lesson 3.3: Angles of Polygons</b> I can find the sum of the interior angle measures of polygons.  I can understand that the sum of the exterior angle measures of a polygon is $360^\circ$ .  I can find the measures of interior and exterior angles of polygons.		<b>3.3</b> Pg. 118 <b>Problem:</b> Activity 1 & Discussion: How do you find the sum of the interior angles of any given polygon? <b>Key Point:</b> Example 1 & 2	Pg. 120 "On Your Own" # 1-5	pg. 123 #4-14	pg. 123 #30-31	pg. 123 #1-3
<b>Day 2: BI Lesson 3.3: Angles of Polygons</b> I can find the sum of the interior angle measures of polygons.  I can understand that the sum of the exterior angle measures of a polygon is $360^\circ$ .  I can find the measures of interior and exterior angles of polygons.		<b>3.3</b> Pg. 121 <b>Problem:</b> Example 3 <b>Discussion:</b> What is true about all regular polygons? How does being a regular polygon effect the interior angle measures? <b>Key Point:</b> Example 4	Pg. 122 "On Your Own" # 6-9	pg. 124 #'s 15-24	#26-29, 32	Resources by Chapter Practice A or B
<b>Day 3: BI Lesson 3.4: Using Similar Triangles</b> I can understand the concept of similar triangles.  I can identify similar triangles.  I can use indirect measurement to find missing measures		<b>3.4</b> Pg. 126 <b>Problem:</b> Activity 2 <b>Discussion:</b> How can you use angles to tell whether triangles are similar? <b>Key Point:</b> Example 1	Pg. 129 "On Your Own" # 1-2 and Pg. 130 # 4-5	Pg. 130 # 6-10	N/A	Resources by Chapter Practice A or B

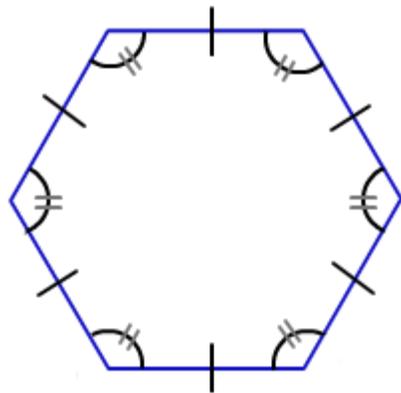
<p><b>Day 4: BI Lesson 3.4: Using Similar Triangles</b>                  I can understand the concept of similar triangles.                   I can identify similar triangles.                   I can use indirect measurement to find missing measures</p>	<p><b>3.4</b> Pg. 129  <b>Problem:</b> <i>Example 2</i>  <b>Discussion:</b> How can you use similar triangles to find unknown lengths?  <b>Key Point:</b> Key vocab &amp; Example 2</p>	<p>Pg. 129 "On Your Own" # 3</p>	<p>pg. 131 # 11-15</p>	<p>Pg. 131 #17, Pg. 132 #10-11</p>	<p>Resources by Chapter Practice A or B</p>
<p><b>Day 5: BI Lesson</b></p>	<p>Whiteboard Review Pg. 132 3.3-3.4 Mixed Review Quiz</p>	<p><b>8.G.5 QUIZ</b></p>			

SAMPLE

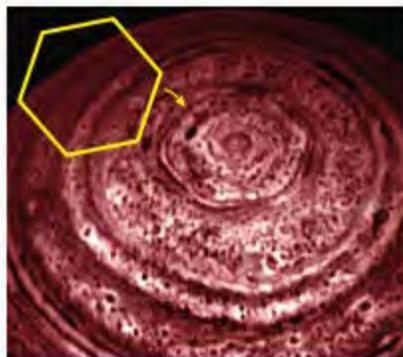
# Introduction to New Material

## Week 8: Angles of Polygons and Using Similar Triangles

Day	Engage	Problem	Key Ideas
1	<p>Show:</p>  <p>Ask: What do you notice? What do you wonder?</p>	<p>BI p. 3.3 [Pg. 118] <b>Problem: Activity 1 a-f</b> Work with a partner. In parts (a)–(e), identify each polygon and the number of sides <math>n</math>. Then find the sum of the interior angle measures of the polygon.</p> <p>a. Polygon:  Number of sides: <math>n = </math>  Draw a line segment on the figure that divides it into two triangles. Is there more than one way to do this? Explain. What is the sum of the interior angle measures of each triangle? What is the sum of the interior angle measures of the figure?</p> <p>b.  c. </p> <p>d.  e. </p> <p><b>Discussion:</b> How do you find the sum of the interior angles of any given polygon?</p>	<p>BI p.120 Key Idea Interior angle measures &amp; Example 1 and 2</p> <div data-bbox="1302 438 1942 893"> <p><b>EX1</b> Sum of angle measures.</p> <p>Quad</p>  <p><math>= 360^\circ</math></p> <p>*All Quads have <math>360^\circ</math> (Activity) * use Triangles to determine sum of Angles (# of sides - 2) <math>\cdot</math> 180 = total angles <math>(n-2) \cdot 180</math></p> <p>① Pentagon <math>(5-2) \cdot 180 = 540^\circ</math>    ② Octagon <math>(8-2) \cdot 180 = 1080^\circ</math>    ③ 25-gon <math>(25-2) \cdot 180 = 4140^\circ</math></p> </div> <div data-bbox="1302 917 1963 1177"> <p><b>EX2</b> Find unknown (interior) Angle measures.</p>  <p>7 sides</p> <p>① Find total (sides-2) <math>\cdot</math> 180 <math>(7-2) \cdot 180 = 900</math></p> <p>② set up equation <math>140 + 145 + 115 + 120 + 130 + 125 + x = 900</math> <math>778 + x = 900</math> <math>x = 122^\circ</math></p> <p><math>m\angle x = 122^\circ</math></p> </div>
2	<p>Show:</p>	<p>BI p. 3.3 [Pg. 121] <b>Problem: Example 3</b> <b>Note:</b> Review Regular Polygons before Example 3: <b>A cloud system discovered on Saturn is in the approximate shape of a regular hexagon. Can you find the measure of each interior angle of the regular hexagon?</b></p>	<p>BI.Pg. 122 Key Idea (Exterior angle measures) and Example 4</p> <p><b>Key Vocab:</b></p> <ul style="list-style-type: none"> <li>• Regular Polygon</li> <li>• Exterior angles</li> <li>• Concave</li> <li>• Convex</li> </ul>



Ask:  
What do you notice? What do you wonder?



The hexagon is about 15,000 miles across. Approximately four Earths could fit inside it.

**Discussion:** What is true about all regular polygons? How does being a regular polygon effect the interior angle measures?

\* Regular Polygon: All angles have the same measure and all sides are = in length.

3 4 5 6 8 12-gon  
 equilateral triangle square pentagon hexagon octagon

\* Seven sides = Septagon Heptagon \* 10 = Decagon  
 \* concave vs. convex

[Ex3] Regular Polygons (all ang are the same)

Find the interior angle measure of a regular hexagon.

$$\frac{(Sides - 2) \cdot 180}{\# \text{ of sides}}$$

$$\frac{(6-2) \cdot 180}{6} = 720 = \text{total}$$

$$\frac{720}{6} = 120^\circ \text{ each angle.}$$

$120^\circ$

[Ex4] Exterior Angle Measures

The sum of the exterior angles of ALL convex polygons is  $360^\circ$ !

$$x + 50 + 127 + 91 = 360$$

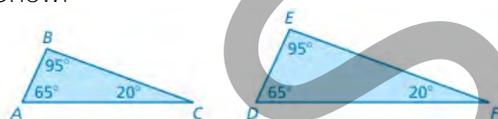
$$x + 268 = 360$$

$$\underline{- 268 \quad - 268}$$

$x = 92^\circ$

3

Show:

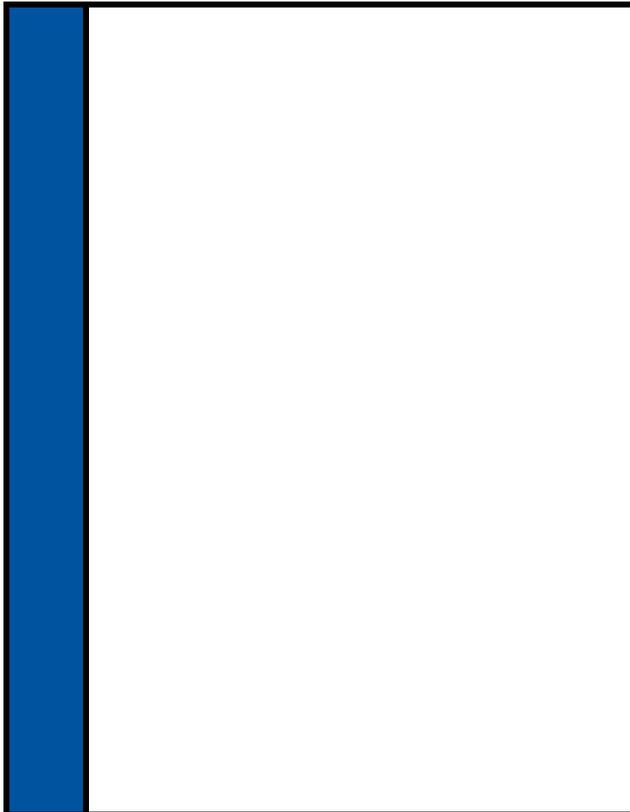


Ask:  
What do you notice? What do you wonder?

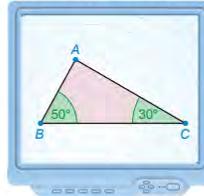
Bl p.126 **3.4 Similar Triangles**  
(Need Geometry Software)

**Problem:** Activity 2

Bl p. 128 Key Idea Similar Triangles & Example 1



Work with a partner. Use geometry software to draw the triangle below.



- Dilate the triangle by the following scale factors.  
 $2$     $\frac{1}{2}$     $\frac{1}{4}$     $2.5$
- Measure the third angle in each triangle. What do you notice?
- REASONING** You have two triangles. Two angles in the first triangle are congruent to two angles in the second triangle. Can you conclude that the triangles are similar? Explain.

**Discussion:** How can you use angles to tell whether triangles are similar?

**3.4 Similar Triangles (Angles)**

\* Similar Triangles have the same angle measures! (sides are proportional)

**EX1 Identifying similar triangles by  $\angle$ 's.**

1) Explain...

Note: if 2  $\Delta$  have 2 pairs of congruent  $\angle$ 's, then the 3rd angles are =.

$50 + 75 + x = 180$   
 $x = 55^\circ$

$50 + 75 + x = 180$   
 $x = 55^\circ$

2.)

Are they similar?

$x + 54 + 63 = 180$   
 $x + 117 = 180$   
 $x = 63^\circ$

$63, 63, 54 = 63, 63, 54$  **Yes!**

$63 + 63 + y = 180$   
 $126 + y = 180$   
 $y = 54^\circ$

3)

Are we similar? prove it...

4

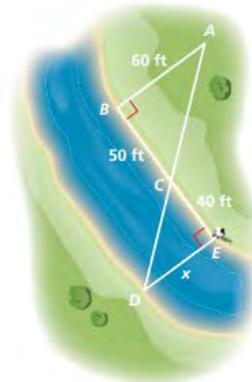
Show:

Ask:  
 What do you notice? What do you wonder?

**3.4 [Pg. 129]**  
 BI p. 127 Indirect measurement  
**Problem: Activity 2**  
 You plan to cross a river and want to know how far it is to the other side. You take measurements on your side of the river and make the drawing shown. (a) Explain why  $\triangle ABC$  and  $\triangle DEC$  are similar. (b) What is the distance  $x$  across the river?

BI p. key vocab & Example 2  
 Vocab:

- Indirect Measurement



**NOTES:**

- a.  $\angle B$  and  $\angle E$  are right angles, so they are congruent.  $\angle ACB$  and  $\angle DCE$  are vertical angles, so they are congruent.

Because two angles in  $\triangle ABC$  are congruent to two angles in  $\triangle DEC$ , the third angles are also congruent and the triangles are similar.

- b. The ratios of the corresponding side lengths in similar triangles are equal. Write and solve a proportion to find  $x$ .

$$\frac{x}{60} = \frac{40}{50}$$

Write a proportion.

$$60 \cdot \frac{x}{60} = 60 \cdot \frac{40}{50}$$

Multiplication Property of Equality

$$x = 48$$

Simplify.

So, the distance across the river is 48 feet.

**Discussion:** How can you use similar triangles to find unknown lengths?

**\*Indirect Measurement:** When you use similar figures to find missing measurements because it is too difficult to find directly.

**EX2 Using Indirect Measurements**

You plan to cross a river and want to know how far it is to the other side. You take measurements on land & use that to estimate the distance across the river. Explain why  $\triangle ABC$  and  $\triangle DEC$  are similar, then find the distance across the river.

Note: When 2  $\triangle$  are similar the sides are proportional  
 $BA \sim ED$  so,  $\frac{60}{x}$  as  $\frac{50}{40}$   
 $BC \sim EC$

$\frac{60}{x} = \frac{50}{40}$ , Fish!  
 $x = 48$  ft

because  $C$  is the same on both  $\triangle$  the  $3^{rd}$  angle must be the same, therefore, they are similar!

$\triangle ABC$   
 $\angle A = \angle D =$   
 $\angle B = 90$   $\angle E = 90$   
 $\angle C = \text{same}$   $\angle C = \text{same}$   
 as  $\quad$  as  
 Vertical angles

# Appendix A4.4: IRS Form 990

## High Point Preparatory Academy

We are contracting with National Heritage Academies (NHA) to partner for the local day-to-day management of High Point Preparatory Academy. Our Board understands that NHA is a for-profit corporation. They are privately held, and therefore do not submit an IRS Form 990.

Appendix A4.3 – EMO/CMO Financial History details the financial health and stability of NHA.



# Appendix A4.3: EMO/CMO Financial History (Bank Statements)

## High Point Preparatory Academy



April 25, 2022

Dr. Kellie Jackson  
Board President  
High Point Preparatory Academy

*Via: Hand Delivery*

Re: High Point Preparatory Academy and NHA

Dear Dr. Jackson,

I understand that Johnston Preparatory Academy has partnered with National Heritage Academies ("NHA") to prepare a charter application for a new school to open in 2022. I write this letter to provide history on the financial stability of the organization over the past years.

NHA is an educational management organization that operates 100 schools in 9 states. NHA has been a valued customer of PNC Bank for approximately 20 years. NHA is in good standing and has been for the duration of our relationship. The company currently has a revolving credit facility with the bank. As of this date, availability on the revolving credit facility is sufficient to ensure the resources are available to meet the commitments to secure a school site, construct or renovate school facilities, and provide for the start-up costs presented in the application.

NHA is also financially able to meet the commitments to fund the predicted operating shortfalls during the first years of operation.

If I can be of further assistance, please call me at 616-771-9184.

Sincerely,

A handwritten signature in black ink that reads "Jason Manchesky". The signature is written in a cursive, flowing style.

Jason Manchesky,  
Senior Vice President



# Appendix A4.2: EMO/CMO Facility Buyout Agreement

## High Point Preparatory Academy

High Point Preparatory Academy's relationship with National Heritage Academies (NHA) regarding the use of a school facility is specified within our lease agreement. NHA will own the facility and rent it to the school. Should we determine that NHA is not the right management partner for High Point Preparatory Academy, our lease agreement stipulates that we have the right to remain in the facility for the remainder of the current school year as well as for the following school year. Upon completion of this timeframe, we have the option to negotiate staying in the facility or we can move to a different location. We are confident this relationship serves our school well. Reasons for this include:

- NHA assumes the risk of all costs involved to develop and construct the school facility. This involves outfitting the building to accommodate full enrollment beginning on our first day (even though we will open with fewer grades and students). Our Board is not responsible for this up-front investment.
- Beyond this risk, NHA is incentivized to make sure High Point Preparatory Academy is high performing. We hold the ability to terminate our contractual relationship with NHA if we are ever dissatisfied with any component of our school, and in turn, leave NHA with an empty school facility.

There is no defined formula in the event the Board indicates an interest in purchasing the school facility. We have included a draft lease agreement with NHA that offers our Board the space and terms we require.

## LEASE

THIS LEASE (“**Lease**”) is entered into the \_\_\_ day of \_\_\_\_\_ 202\_, to be effective July 1, 202\_ (the “**Effective Date**”) by and between NATIONAL HERITAGE ACADEMIES, INC., a Michigan corporation, of 3850 Broadmoor SE, Ste. 201, Grand Rapids, Michigan 49512 (“**Landlord**”), and HIGH POINT PREPARATORY ACADEMY, a North Carolina non-profit corporation, having an address of \_\_\_\_\_, \_\_\_\_\_, North Carolina \_\_\_\_\_ (“**Tenant**”).

## RECITALS

A. Landlord (defined in Section 22.5), as tenant, and Charter Development Company, L.L.C., as landlord (together with its successors, assigns and successors in interest, the “**Master Landlord**”) are party to that certain Master Lease Agreement effective January 1, 1999, as amended (the “**Master Lease**”).

B. Landlord and Master Landlord amended the Master Lease to subject the Premises thereto.

C. Tenant desires to sublease the Premises from Landlord, and Landlord desires to so sublease the Premises to Tenant, on the terms and conditions set forth herein.

NOW, THEREFORE, in consideration of the mutual covenants set forth above and herein, Landlord and Tenant agree as follows:

## ARTICLE 1

### The Premises and Other Agreements.

1.1 Premises. Landlord hereby leases to Tenant, on the terms and conditions hereinafter set forth, the real estate located in \_\_\_\_\_, North Carolina, (\_\_\_\_\_ County), with an address of \_\_\_\_\_, \_\_\_\_\_, North Carolina \_\_\_\_\_ and more particularly described on Exhibit “A” attached hereto (the “**Land**”), and all improvements located on the Land (the Land and such improvements as they may exist from time to time, hereinafter referred to as the “**Premises**”).

1.2 Master Lease. This Lease is subordinate and subject to the Master Lease. Tenant covenants that it shall not through its negligent, intentional or wrongful acts or omissions cause a breach or default on the part of Landlord under the terms of the Master Lease. Landlord represents and warrants to Tenant that the terms of this Lease are not inconsistent with the terms of the Master Lease, and Tenant’s compliance with the terms of this Lease will not constitute a breach of the terms of the Master Lease. Landlord and Tenant each hereby indemnify the other party against all liability, judgments, costs, damages, claims, costs and expenses, including, without limitation, reasonable attorneys’ fees arising out of or relating to such indemnifying party’s breach of the covenants, representations or warranties set out by such parties in the preceding two sentences.

1.3 Services Agreement. In accordance with the terms and conditions of that certain “**Services Agreement**” of even or similar date herewith, by and between Landlord and Tenant,

Landlord has contractually agreed to manage and operate the Premises and the school located on the Premises, and in connection with the same, Landlord is obligated to fulfill certain obligations assigned to Tenant under the terms of this Lease (the “**Services Obligations**”). In the event that Landlord fails to timely perform or fulfill one or more of the Services Obligations and said failure (a) is not otherwise excused, or subject to notice and an unexpired cure period, by the terms of the Services Agreement, and (b) is not due to the fault of Tenant, then said failure, in and of itself, shall not be deemed to be a Default by Tenant under the terms of this Lease. The foregoing sentence shall be of no further force and effect in the event of expiration or termination of the Services Agreement for any reason.

## ARTICLE 2

### Term.

2.1 Initial Term and Renewals. The “**Initial Term**” of this Lease shall commence on July 1, 202\_ and shall terminate effective June 30, 202\_ (the “**Initial Term Expiration**”), unless sooner terminated as hereinafter set forth. Provided that (a) Tenant is not then in Default under this Lease, the Services Agreement, or the “**Charter**” (as defined in Section 13.1.E. below), and (b) this Lease, the Services Agreement and the Charter are still in full force and effect, then, unless a Notice of Non-Renewal is sent as provided below, on the Initial Term Expiration (and each anniversary thereof, during the Term of this Lease), this Lease shall be automatically renewed for successive one (1) year terms, upon the same terms and conditions as contained herein. The “**Term**” of this Lease shall mean the Initial Term and every renewal term entered into by Landlord and Tenant. The term “**Upcoming Expiration Date**” shall mean the Initial Term Expiration, or if the Initial Term Expiration has occurred, then the upcoming anniversary of the Initial Term Expiration. If either party, in its sole discretion, does not wish for this Lease to automatically renew, then at least one hundred eighty (180) days prior to the Upcoming Expiration Date, such party must notify the other party in writing that it does not wish the Term to be renewed (a “**Notice of Non-Renewal**”). Upon the timely delivery of a Notice of Non-Renewal, this Lease shall terminate on the Upcoming Expiration Date.

2.2 If Tenant is entitled to terminate this Lease due to Landlord’s default hereunder or if Tenant is entitled to terminate the Services Agreement due to Landlord’s default thereunder, then provided that Tenant is not in default hereunder or under the Services Agreement, Tenant may elect by written notice to Landlord given within thirty (30) days after Tenant provides notice to Landlord of such default and Landlord fails to cure such default, leave this Lease in effect (except for any Lease renewal and assignment rights) for the remainder of the school year then in effect plus the succeeding one (1) school year (July 1 to June 30)(collectively, the “**Holdover Period**”), in which event the effective termination date of the Lease shall be the earlier of the last day of such Holdover Period or the date upon which Tenant vacates the Premises in accordance with the terms of this Lease, provided however that at the time of Tenant’s election and at all times during such Holdover Period Tenant (i) is not in default under this Lease or the Services Agreement, and (ii) Tenant’s Charter is in full force and effect (the “**Holdover Option**”). In the event Tenant so elects to remain in possession pursuant to the Holdover Option, Tenant shall give Landlord written notice not later than sixty (60) days before the last day of each succeeding school year during the Holdover Period as to whether or not Tenant elects to remain in possession for the next succeeding school year; in the event Tenant gives no such notice, Tenant shall be deemed to

have elected not to remain in possession, and the Lease shall terminate when Tenant vacates the Premises (which it shall timely due upon the end of the then school year).

### ARTICLE 3

#### Rent.

3.1 Annual Rent. During the Initial Term, Tenant hereby leases said Premises for the Term above stated and agrees to pay Landlord annual rent of \_\_\_\_\_ and \_\_\_\_/100 Dollars (\$ \_\_\_\_\_), (“**Annual Rent**”) in twelve (12) equal monthly installments of \_\_\_\_\_/100 Dollars (\$ \_\_\_\_\_) (each, a “**Monthly Installment**”) each payable to Landlord (or to such other “Person” (defined in Section 22.9) or agent as Landlord may specify by written notice to Tenant) in advance on the first day of each calendar month during the Term. The term “**Lease Year**” is defined to mean any twelve month period from July 1 to June 30 of the following year, during the Term. If the Term ends before the end of a Lease Year, Annual Rent shall be prorated on a daily basis and paid in advance by Tenant on the first day of the last calendar month during the Term. Annual Rent may be adjusted upon determination of final costs for acquisition and construction of the Premises.

3.2 Additional Rent. Any amounts due from Tenant to Landlord hereunder, other than Annual Rent, shall constitute “**Additional Rent.**” Additional Rent shall, unless expressly provided to the contrary in this Lease, be payable from Tenant to Landlord on the same terms that Annual Rent is payable, with the next payment of the Monthly Installment coming due hereunder. Annual Rent and Additional Rent may be referred to collectively herein as “**Rent**”.

3.3 Payments. All Rent shall be paid to Landlord at Landlord’s address as set forth in the introductory paragraph hereof, or at such other address as Landlord may designate in writing. This Lease is a triple net lease and Rent shall be paid without setoff, counterclaim, recoupment, abatement, suspension, or deduction, except as expressly provided for herein. This Lease shall not terminate, nor shall Tenant have any right to terminate this Lease during the Term (except as otherwise expressly provided herein), nor shall Tenant be entitled to any abatement, deduction, deferment or reduction of Annual Rent hereunder (except as otherwise expressly provided herein), nor shall the obligations of Tenant under this Lease be affected by any interference with Tenant’s use of the Premises unless caused by Landlord or Master Landlord. It is the intention of the parties hereto that the obligation of Tenant to pay Rent hereunder shall be separate and that the Rent shall continue to be payable in all events and that the obligations of Tenant hereunder shall continue unaffected, unless the requirement to pay or perform the same shall have been terminated pursuant to an express provision of this Lease.

3.4 Landlord’s Right to Increase. In the event Landlord makes future economic investments in capital improvements to the Premises, or acquires additional property for the benefit or use of Tenant (with such capital improvements or additional property acquisitions being subject to the written consent of Tenant if and to the extent that the cumulative costs thereof exceed Two-Hundred and Fifty Thousand Dollars (\$250,000) during any Lease Year, which consent shall not be unreasonably withheld, conditioned or delayed), then the Annual Rent payable by Tenant shall be promptly adjusted to compensate Landlord for such additional economic investment.

## ARTICLE 4

### Use, Occupancy and Purpose.

#### 4.1 Permitted Uses.

A. Tenant shall use the Premises solely for operating a publicly chartered school or academy for grades kindergarten through 8th grade, and for ancillary or directly related uses.

B. Any other use of the Premises must be approved by Landlord in advance in writing.

#### 4.2 Restrictions on Use.

A. Tenant shall not use or allow the use of the Premises for any unlawful purpose, nor shall Tenant allow the Premises to be used in violation of the Charter.

B. Tenant shall not allow the Premises to be used in violation of any public law, ordinance, rule or regulation, or in violation of any certificate of occupancy or certificate of compliance covering or affecting the Premises, or any part thereof. Tenant shall not suffer any act to be done or any condition to exist on the Premises or any part thereof which may in law constitute a nuisance, public or private, or which may make void or voidable, or increase premiums for, any insurance with respect thereto. Tenant shall not commit any waste, damage, or injury of or to the Premises or the fixtures or any part thereof and shall take all reasonable precautions and actions to prevent others from committing any of the foregoing.

#### 4.3 Prohibited Uses.

A. Tenant covenants unto Landlord that during the Term, no part of the Premises shall be used for: the operation of any (i) private or commercial golf course, (ii) country club, (iii) massage parlor, hot tub facility, or suntan facility (iv) race track or other facility used for gambling, or (v) store the principal business of which is the sale of alcoholic beverages for consumption off premises; or the rental to others of residential property (as defined in Section 168(e)(2)(A) of the Internal Revenue Code).

B. Notwithstanding anything contained in this Lease to the contrary, in the event of a breach of any of the covenants contained in this Section 4.3, Landlord may immediately terminate this Lease by written notice to Tenant.

4.4 Educational Program. Tenant shall neither use the Premises nor allow the Premises to be used at any time during the Term in a manner that interferes with the performance of Landlord's obligations under the Services Agreement, including without limitation, the implementation and delivery of the Educational Program at the Premises. Tenant acknowledges that the terms of the preceding sentence are intended to allow Landlord to restrict access to certain portions of the Premises at certain times provided such access restriction is at all times consistent with the implementation and delivery of the Educational Program.

## ARTICLE 5

### Utilities.

5.1 Utility Connections; Utility Service. Landlord represents and warrants that construction of the Premises pursuant to Section 9.1 shall include provision of connections for all utility services necessary to the operation of a school at the Premises. Utility services, including without limitation gas, electricity, light, heat, water, sewage and telephone or other communication services, shall be contracted for and paid for by Tenant.

5.2 Disclaimers. Unless due to the gross negligence or willful misconduct of Landlord, Landlord shall not be liable for (i) any failure of water supply or electric current or any service by any utility provider or local government, or (ii) injury to persons, including death, or damage to property resulting from steam, gas, electricity, water, rain or snow which may flow or leak from any part of the Premises or from any pipes, appliances or plumbing works from the street or subsurface or from any other place. Any express or implied rights, easements or licenses for view purposes or for the passage of light and air are hereby expressly disclaimed by Tenant. Except as otherwise expressly provided in this Lease or as may be provided in the Services Agreement, Landlord shall have no obligation to provide any services to Tenant or to the Premises.

5.3 Modifications and Replacements. If the existing utility services are required to be modified or replaced for any reason by any utility company or authorized agency, governmental or otherwise, then Tenant shall make such modifications or replacements at Tenant's expense and shall save Landlord harmless therefrom.

## ARTICLE 6

### Taxes.

6.1 Payment by Tenant. Tenant shall pay all (a) taxes levied on or assessed against the Premises during the Term, (b) special assessments levied on or assessed against the Premises during the Term that become due and payable during the term of this Lease, and (c) other similar charges levied on or assessed against the Premises during the Term and that become due and payable during the term of this Lease, except income and other taxes assessed against or by reason of Landlord's reversionary interest in or income from the Premises (the "Taxes"), (i) prior to the date on which any penalties, interest or late charges would apply, and to save Landlord harmless from the payment thereof, or (ii) to Landlord, in accordance with the terms of Section 6.4, provided Landlord makes the demand on Tenant required in Section 6.4. Taxes for the first and last year of the Term or any extension or renewal thereof shall be prorated on the basis of the fiscal period for which such tax is assessed.

6.2 Landlord's Option to Pay. If at any time after any tax, assessment or similar charge so charged or assessed against said Premises shall become due or payable and Tenant shall neglect or fail to pay the same, Landlord, without being obligated to do so, may pay the same at any time thereafter, and the amount of any and all such payments so made by Landlord shall be and is hereby declared to be payable as Additional Rent with the next Monthly Installment due hereunder.

6.3 Payment at End of Term. At the termination of this Lease by lapse of time or otherwise, all Taxes payable by Tenant under the provisions of this Article 6 shall be paid by Tenant to Landlord.

6.4 Monthly Installments. Upon demand of Landlord, (i) Tenant shall pay as Additional Rent, in addition to each Monthly Installment due hereunder, a sum equivalent to one-twelfth of the amount estimated by Landlord to be sufficient to enable Landlord to pay at least thirty (30) days before they become due, all such taxes, assessments and other charges, and (ii) Tenant will deliver and pay over to Landlord such additional sums as are necessary to make up any deficiency in the amount necessary to enable Landlord to fully pay such taxes, assessments and other charges. Any such tax payments from Tenant may be commingled with the general funds of Landlord and no interest shall be payable in respect thereof. If Landlord receives tax payments from Tenant in accordance with this Section, then Landlord shall pay the full amount of taxes, assessments and other charges when due to the appropriate taxing authorities. In the event Tenant's tax payments under this Section are in any way insufficient to pay the full amount of taxes, assessments and other charges when due to the appropriate taxing authorities, then Tenant shall pay to Landlord, as Additional Rent, any shortfall within thirty (30) days of receiving a demand therefor from Landlord.

6.5 Non-Real Property Taxes. In the event that the City, County, State, or any other political subdivision that has taxing authority over the Premises shall, during the Term, impose upon Landlord any tax or other governmental charge in lieu of all or any part of the Taxes (a "**Non-Real Property Tax**"), such Non-Real Property Tax shall, for purposes of this Section, be treated as if it were included in the Taxes, unless the Taxes have been paid by Landlord.

6.6 Receipts. Upon demand of Landlord within ninety (90) days after the date all or any part of the Taxes are payable by Tenant, Tenant shall provide to Landlord official receipts of the appropriate taxing authority or other proof satisfactory to Landlord of the payment of such Taxes.

## ARTICLE 7

### **Insurance.**

7.1 Tenant will cause to be maintained policies of fire and extended coverage insurance on all buildings, structures, fixtures and improvements now or hereafter situated on the Premises and all other property leased hereunder in their full replacement cost. Such policies shall have no greater than eighty (80%) percent co-insurance provision and shall contain the standard "agreed amount" clause for evaluating replacement cost. Such policies shall name Tenant, Landlord, other parties designated by Landlord and the "first mortgagee" (defined in Section 22.3) as their interests may appear as insureds and such insurance shall be carried by an insurance company or companies approved by Landlord and the first mortgagee. Tenant shall make available to Landlord on request copies of said policies. Notwithstanding the aforesaid, in no event shall the manner, forms, companies, sums or length of terms be less than that required by the first mortgagee according to the terms and provisions of the "first mortgage" (defined in Section 22.2)..

7.2 Each such policy shall include: (i) a standard mortgagee clause in favor of the first mortgagee; (ii) a provision to the effect that the waiver of subrogation rights by the insured does not void the coverage; (iii) a provision that the policy shall not be changed or canceled without at least thirty (30) days' prior written notice to Landlord and the first mortgagee; and (iv) a provision that any forfeiture of the policy due to an act of Tenant shall not affect the validity insofar as Landlord or the first mortgagee are concerned.

7.3 From time to time as required by Landlord or the first mortgagee, Tenant at its expense, shall obtain from an engineer or appraiser, in the regular employ of the insurer, or an appraiser, engineer, architect or contractor designated by Tenant and approved by Landlord and the insurer, such evidence as may be required by such insurer to maintain the "agreed amount" clause eliminating the possibility of any co-insurance penalty.

7.4 If Tenant shall refuse or fail to so insure and keep insured the Premises and keep such policies in Landlord's and first mortgagee's possession, Landlord may at its election procure and from time to time renew such insurance, and the amounts expended therefore shall be Additional Rent due from Tenant with the next installment of Rent accruing hereunder and may be collected in the same manner as though Rent due hereunder.

7.5 Upon demand from Landlord, Tenant shall pay in advance as Additional Rent, a sum equivalent to one-twelfth of the amount estimated by Landlord to be sufficient to enable Landlord to pay at least thirty (30) days before they become due all insurance premiums on all policies of insurance required or allowed to be carried by Tenant hereunder. Such Additional Rent may be commingled with the general funds of Landlord and no interest shall be payable in respect thereof. Upon demand by Landlord, Tenant will pay Landlord, as Additional Rent, such additional sums as are necessary to make any deficiency in the amount necessary to enable Landlord to fully pay such premiums.

7.6 Landlord shall have no liability for damage to or loss of personal property located upon the Premises, unless and to the extent caused by Landlord.

## ARTICLE 8

### **Casualty; Restoration.**

8.1 If the Premises are damaged by fire or other casualty (a "**Casualty**"), Tenant shall give immediate written notice thereof to Landlord and the first mortgagee ("**Tenant's Casualty Notice**"). Landlord shall, within 60 days after receipt of Tenant's Casualty Notice, deliver to Tenant a good faith estimate (the "**Damage Notice**") of the time needed to repair the damage caused by such Casualty ("**Restoration**").

If the Premises are damaged by Casualty such that Tenant is prevented from conducting its business in the Premises in a manner reasonably comparable to that conducted immediately before such Casualty and Landlord estimates that the damage caused thereby cannot be repaired within 210 days after the commencement of repairs (the "**Repair Period**"), then Tenant may terminate this Lease by delivering written notice to Landlord of its election to terminate within 30 days after the Damage Notice has been delivered to Tenant.

If a Casualty occurs and (1) Landlord estimates that the damage cannot be repaired within the Repair Period, (2) regardless of the extent of damage, (a) the damage occurs during the last twelve (12) months of the Term or (b) the damage is not fully covered by Tenant's insurance policies or any insurance Landlord may carry on the Premises or (c) Landlord makes a good faith determination that restoring the damage would be uneconomical, or (3) Landlord is required to pay any insurance proceeds arising out of the Casualty to a first mortgagee, then, in any such case, Landlord may terminate this Lease by giving written notice of its election to terminate within 30 days after the Damage Notice has been delivered to Tenant.

If neither party elects to terminate this Lease following a Casualty, then Landlord shall, within a reasonable time after such Casualty, begin to repair the Premises and shall proceed with reasonable diligence to restore the Premises to substantially the same condition as they existed immediately before such Casualty; however, Landlord shall not be required to repair or replace any improvements, alterations or betterments made by Tenant within the Premises (which shall be promptly and with due diligence repaired and restored by Tenant at Tenant's sole cost and expense) or any furniture, equipment, trade fixtures or personal property of Tenant or others in the Premises or the Project, and Landlord's obligation to repair or restore the Premises shall be limited to the extent of the insurance proceeds actually received by Landlord for the Casualty in question. If this Lease is terminated under the provisions of this Article 8, Landlord shall be entitled to the full proceeds of the insurance policies providing coverage for all alterations, improvements and betterments in the Premises (and, if Tenant has failed to maintain insurance on such items as required by this Lease, Tenant shall pay Landlord an amount equal to the proceeds Landlord would have received had Tenant maintained insurance on such items as required by this Lease).

8.2 Rent insurance proceeds, if payable, shall be applied by Tenant to the payment of, when and as due and payable, the installments of Rent and other payments due under this Lease until Restoration has been completed or until the Lease is terminated pursuant to any terms hereof. The balance, if any, of such proceeds shall be paid to Tenant or as Tenant may direct.

8.3 During any period of Restoration, Rent shall abate in proportion to the portion of the Premises that cannot be used for school purposes in Tenant's reasonable determination.

## ARTICLE 9

### **Care of Premises.**

9.1 Tenant will keep the Premises and all other property leased hereunder in good condition and repair, and will yield and deliver the same to Landlord at the expiration or termination of the Lease in as good a condition as when taken, reasonable use and wear thereof, and damages thereto by Landlord or its agents or invitees, excepted. Tenant shall also maintain all portions of the Premises and adjoining areas in a clean and orderly condition, free of dirt, rubbish, snow, ice and unlawful obstructions, except for those attributable to Landlord's use or action. Tenant may not make any repairs, alterations, additions, changes or improvements to the Premises, except as described above in Section 5.3, without the written consent of Landlord. All repairs, alterations, changes or improvements shall be completed and maintained by Tenant in good workmanlike condition, free and clear of all liens and encumbrances arising out of such work.

9.2 Without limiting the rights granted to Landlord under Article 4 of this Lease, Landlord shall have the right to enter upon the Premises for the purpose of making any repairs thereto and performing any work thereon which may be necessary by reason of Tenant's failure to make any such repairs or perform any such maintenance work as provided herein. Except in case of emergency, the privilege and right of entry shall be exercised at reasonable times and at reasonable hours. Tenant shall pay the cost of any such repairs and maintenance work to Landlord, upon demand therefor and upon submission of satisfactory evidence of Landlord's payment of such costs which sums shall constitute Additional Rent.

## ARTICLE 10

### **Liability.**

10.1 Tenant agrees to save Landlord and the first mortgagee harmless from any and all liabilities, losses, damages, penalties, costs and expenses arising from any injury or death to any person or damage to any property in, on, or about the Premises which arise out of (i) gross negligence or willful misconduct of Tenant, or (ii) any noncompliance or breach by Tenant of any of the terms, conditions, warranties, representations, or undertakings contained in or made pursuant to this Lease. Tenant agrees to procure at its own expense public liability and property damage, single limit liability insurance for the benefit of Landlord, Tenant and the first mortgagee as their interests may appear, in amount not less than One Million Dollars (\$1,000,000) to keep such insurance in force during the Term hereof, and to deliver certificates of such coverage to Landlord at least annually. In the event Tenant defaults as to any such obligations, Landlord may obtain such insurance and charge the cost thereof to Tenant as Additional Rent, payable with the monthly installment next coming due.

10.2 Landlord agrees to save Tenant harmless from any and all liabilities, losses, damages, penalties, costs and expenses arising from any injury or death to any person or damage to any property in, on, or about the Premises to the extent caused by willful misconduct or negligence by Landlord. Landlord agrees to procure at its own expense public liability and property damage, single limit liability insurance for the benefit of Landlord and Tenant as their interests may appear, in amount not less than One Million Dollars (\$1,000,000) to keep such insurance in force during the Term hereof, and to deliver certificates of such coverage to Tenant; Landlord agrees to furnish to Tenant upon request certificates of insurance evidencing such insurance.

10.3 Each party hereto, for itself and its respective successors and assigns (including any person, firm or corporation which may become subrogated to any of its rights), waives any and all rights and claims for recovery against the other party, and its officers, employees, agents, and assigns, or any of them, on account of any loss or damage to any of its property insured under any valid and collectible insurance policy or policies, to the extent of any recovery collectible under such insurance. Notwithstanding the foregoing, this waiver shall not be applicable if it has the effect of invalidating any insurance coverage of Landlord or Tenant.

## ARTICLE 11

### Compliance.

11.1 During the Term, Tenant shall assure compliance with all Legal Requirements relating to Tenant, the conduct of Tenant's business or pertaining to or otherwise affecting the use of the Premises; and Tenant shall reimburse Landlord for any damages or penalties suffered because of any such noncompliance. Landlord hereby represents that as of the Effective Date, the Premises is in compliance with all Legal Requirements; and Landlord shall reimburse Tenant for any damages or penalties suffered because of any such noncompliance of Landlord.

11.2 Tenant represents that no indebtedness of any kind incurred or created by Tenant herein shall constitute an indebtedness to the State or its political subdivisions, and no indebtedness of Tenant shall involve or be secured by the faith, credit or taxing power of the State or its political subdivisions. (See NCGS 115C-218.105).

## ARTICLE 12

### Assignment and Subletting.

12.1 Tenant shall not assign, transfer, sublet or otherwise allow the use by another Person of the Premises or any part thereof or any interest hereunder without first obtaining the written consent of Landlord, which may be withheld by Landlord for any reason. Landlord may, in its sole discretion, assign, transfer, pledge and convey its rights, title and interests in the Premises and/or this Lease, without the consent of or notice to Tenant; provided, however, the terms and conditions of this Lease as set forth herein as of the execution date of this Lease shall have not been modified or amended by such assignment and shall be subject to Section 23.3 hereof.

## ARTICLE 13

### Default.

13.1 Tenant shall be in default upon occurrence of any of the following events (any of the following, a "**Default**"):

A. Failure by Tenant to pay any portion of Rent for a period of more than ten (10) days after Tenant receives written notice of such failure to pay from Landlord (a "**Monetary Default**"); provided in no case shall Landlord be obligated to send notice of failure to pay more than twice in any twelve (12) month period.

B. Failure by Tenant to comply with any term, provision, condition or covenant of this Lease (other than a Monetary Default or as specified in Subsection F. below), if such failure is not cured by Tenant within a period of thirty (30) days after Tenant receives written notice from Landlord specifying such failure

C. Tenant's becoming insolvent, as that term is defined by any federal or state law or regulation (the "**Insolvency Laws**"); the appointment of a receiver or custodian for all or a substantial portion of Tenant's property or assets; the institution of a foreclosure action upon all

or a substantial portion of Tenant's real or personal property; the filing of a voluntary petition under the provisions of the Bankruptcy Code or Insolvency Laws; the filing of an involuntary petition against Tenant as the subject debtor under the Bankruptcy Code or Insolvency Laws, which is either not dismissed within sixty (60) days of filing, or results in the issuance of an order for relief against the debtor, whichever is later; or Tenant's making or consenting to an assignment for the benefit of creditors or a common law composition of creditors, or if Tenant's leasehold interest herein shall be levied on execution.

D. Termination of the Services Agreement due to default made or caused by Tenant in any of the covenants, terms or conditions of the Services Agreement required to be kept or performed by Tenant.

E. Expiration or discontinuance for any reason of the Charter granted to Tenant by its authorizer (the "**Charter**"), other than an expiration or discontinuance which results in a new Charter effective as of termination of the existing Charter and with terms which would not, in Landlord's opinion, substantially alter Tenant's ability to comply with the terms of the Lease, Services Agreement, or Charter.

F. Failure by Tenant to deliver the certificate required by Section 23.2 within the time required by such Section.

13.2 Landlord's Remedies. Upon the occurrence of any Default and the lapse of any grace or cure periods without cure thereof, Landlord shall have the option to pursue any one or more of the following remedies upon notice to Tenant:

13.2.1. *Termination.* Terminate this Lease or terminate Tenant's right to possession, and in either event, accelerate all obligations of Tenant owed to Landlord under the Lease and force Tenant to immediately surrender the Premises to Landlord. Tenant agrees to pay to Landlord on demand the costs which Landlord may suffer by reason of such termination. Immediately upon any termination Landlord shall be entitled to recover from Tenant (i) all outstanding and unpaid Rent as of the date of such termination, (ii) the unamortized cost of any initial upfit work performed according to this Lease by Landlord in anticipation of Tenant's occupancy, (iii) the amount of any Rent that was abated pursuant to this Lease, and (iv) all future Rent due for the remaining balance of the Term, which future Rent shall be discounted to present value using a discount rate equal to the U.S. Treasury Bill or Note rate with the closest maturity to the remaining term of the Lease as selected by Landlord.

13.2.2. *Possession.* Enter upon and take possession of the Premises and expel or remove Tenant and any other person who may be present, without terminating the Lease or being liable for prosecution or any claim for damages, and, if Landlord so elects, relet the Premises on such terms as Landlord may determine, subject, however to Tenant's right to stay in possession of the Premises until the end of the current school year in accordance with the Services Agreement.

13.2.3. *Entry.* Enter upon the Premises without being liable for prosecution or any claim for damages, and do whatever Tenant is obligated to do under the terms of this Lease. Tenant agrees to reimburse Landlord on demand for any expenses which Landlord may incur in effecting compliance with Tenant's obligations.

13.2.4. *Mitigation.* Landlord shall have a duty to mitigate damages in the event of a Tenant Default, provided, however, that Landlord shall not be obligated (a) to favor the Premises for re-letting in comparison to other real property owned or leased by Landlord in the vicinity of the Premises, (b) to discount or disregard any of the following factors regarding a potential new tenant for the Premises: term of proposed lease, proposed rent, proposed use and the creditworthiness and reputation of the proposed tenant, or (c) to spend more toward re-letting the Premises than Landlord would spend in leasing real property in the ordinary course of its business.

13.2.5. *Application of Proceeds.* Any proceeds of re-letting the Premises shall be applied to pay (i) first, all costs of Landlord incurred in connection with such re-letting (including without limitation, all costs and expenses of taking possession of the Premises, securing new tenants, including expenses for redecoration, alterations or other upfit costs), (ii) second, any indebtedness of Tenant other than Rent, (iii) third, all then-outstanding Rent due hereunder, and (iv) fourth, any future obligations of Tenant, including without limitation, Rent. Tenant agrees to pay to Landlord on demand any deficiency that may arise by reason of such re-letting within ten (10) days of notice of the same from Landlord, following a re-letting. In the event Tenant pays to Landlord all accelerated sums due, any amounts applicable to Rent following the date of re-letting shall be reimbursed to Tenant as received.

13.3 No termination of this Lease pursuant to this Section or repossession of the Premises or any part thereof or of any other property leased hereunder shall relieve Tenant of its liabilities and obligations under this Lease that accrue during the Term, all of which shall survive any such termination or repossession and, if the Premises or any part thereof shall not have been relet, Tenant shall pay to Landlord as and for liquidated and agreed current damages the then present value of the Rent and other sums and charges to be paid by Tenant until what would have been the end of the Term in the absence of such termination or repossession. Landlord shall make a good faith effort to relet the Premises and alleviate Tenant of additional damages. Exercise of any remedy hereunder by Landlord shall not exclude the right to exercise any other remedy hereunder. Notwithstanding any of the foregoing obligations of Tenant stated herein to the contrary, upon termination of this Lease or Tenant's dispossession of the Premises, Tenant will automatically be relieved from and after the date of such termination or dispossession of all personal liability for the performance of any covenants or obligations on the part of Tenant contained in this Lease thereafter to be performed except for those liabilities expressly stated to have survived such termination or dispossession as stated herein.

13.4 To the extent applicable, Tenant has been made aware that Master Landlord as landlord under the Master Lease, or National Heritage Academies, Inc., as tenant under the Master Lease or an Affiliate (defined in Section 22.1) of either or any other Person that enjoys an interest in the Premises seeks the benefits offered pursuant to the U.S. Department of Treasury New Markets Tax Credit program and may pursue other federal, state or city funds, subsidies (including any city real estate tax exemptions or abatements) or loans (collectively, the "**Benefits**") in connection with the use of the Premises, and as a result of the grant of the Benefits, the Premises may be subject to certain use restrictions. Tenant shall have no responsibility and bear no liability for any claims, fees, expenses, costs or other impositions arising from or in connection with the Benefits due to the termination of this Lease or Tenant's dispossession of the Premises.

## ARTICLE 14

### **Waiver of Breach.**

14.1 No waiver by either party hereto of any breach of any of the terms of this Lease shall be deemed to be a waiver of any other or subsequent breach.

## ARTICLE 15

### **Surrender.**

15.1 Upon the expiration or earlier termination of this Lease, Tenant shall (i) surrender the Premises in broom clean, in good condition, free and clear of all lettings and occupancies, (except those previously approved by Landlord), free and clear of all liens and encumbrances, except that part of the Premises which have been taken through eminent domain, if any, after the delivery hereof, and otherwise in the same condition as Tenant received the Premises on the first day of the Initial Term, except for the following (which are allowed to remain at the Premises): any alterations that Landlord has not required to be removed, normal wear and tear and loss by fire or other casualty losses for which insurance proceeds have been received by Landlord; (ii) surrender all keys for the Premises to Landlord and (iii) inform Landlord of all combinations on locks in the Premises. All installations, alterations, additions and improvements, including partitions which may have been installed by either Landlord or Tenant, shall remain upon the Premises and shall become Landlord's property, all without compensation, allowance or credit.

15.2 On or before the scheduled expiration of the Term, Tenant may elect to remove its personal property and any fixtures and equipment. Any of Tenant's items listed in the preceding sentence not removed at the end of the Term shall be considered abandoned, and Landlord may appropriate such items for itself, sell such items or otherwise dispose of the same in such commercially reasonable manner as Landlord deems expedient without any liability to Tenant or any parties claiming by, through or under Tenant. In the event the Term terminates for any reason on other than its scheduled expiration date, then Tenant shall have a period of time in which to re-enter the Premises to retrieve its personal property, beginning on the date the Term terminates and ending fifteen (15) days thereafter. Any damage caused to the Premises by such removal shall be repaired by Tenant no later than fifteen (15) days after the end of the Term, but no Rent shall be payable by Tenant for such period of time (and such continued use of the Premises by Tenant shall not be deemed a holdover or a renewal or as creating a periodic or other similar tenancy that might be implied by law). Tenant shall reimburse Landlord for any damage to any portion of the Premises caused by Tenant during the removal of any items contemplated for potential removal in this Section.

## ARTICLE 16

### **Eminent Domain.**

16.1 If all or any part of the Premises shall be taken by any Governmental Authority under power of eminent domain, or by private purchase in lieu thereof, all damages awarded for such taking shall belong to and be the property of Landlord, whether such damages shall be awarded as compensation for the taking of or diminution in value to the leasehold or the fee of the

Premises and Tenant hereby irrevocably assigns to Landlord any award or payment to which Tenant may become entitled as a result thereof, provided, however, that Tenant shall be entitled to receive from such Governmental Authority compensation for its fixtures and personal property so taken.

16.2 In the event that only a part of the Premises are so taken, and the part not so taken cannot be completed as an architectural unit for the use described in Section 4.1 hereof, Tenant shall have the option to terminate this Lease by serving written notice of termination on Landlord within sixty (60) days after the taking.

16.3 If only a part of the Premises shall be so taken such that the part not so taken can be completed as an architectural unit for the use described in Section 4.1 hereof, Landlord (or at Landlord's direction, Tenant) shall, as promptly as practicable, make a complete architectural unit of the remainder of the building on the Premises (but only to the extent of the proceeds received for such taking); and there shall be an abatement of the monthly Rent hereinabove provided for in an amount equal to the percentage of the Premises and the building so taken.

## ARTICLE 17

### Notices.

17.1 All notices and communications required under this Lease shall be in writing and served personally or by nationally recognized overnight courier on Landlord and on Tenant at the address indicated on page one (1) hereof, or at such other address as may be designated in writing to the other party hereto by notice in accordance with this Section.

## ARTICLE 18

### Self Help.

18.1 If Tenant shall at any time fail to make any payment or perform any act on its part to be made or performed hereunder, then Landlord without notice to Tenant, except when other notice is expressly provided for in this Lease and without waiving or releasing Tenant from the obligations of Tenant contained in this Lease, may (but shall be under no obligation to) make such payment or perform such act, and may enter upon the Premises for any such purpose, and take all such actions thereon as may be necessary to address Tenant's non-payment or failure to act.

18.2 All sums to be paid by Landlord and all costs and expenses incurred by Landlord in connection with the performance of any such act referenced in Section 18.1, together with any consequential damages Landlord may suffer by reason of the failure of Tenant to make such payment or perform such act, and counsel fees incurred by Landlord in connection therewith or in enforcing its rights hereunder, shall be paid by Tenant to Landlord on demand as Additional Rent.

18.3 Tenant agrees to hold Landlord harmless from any inconvenience or interference with Tenant's operation of its business as a result of Landlord's exercising any rights granted under Section 18.1.

## ARTICLE 19

### Construction Liens.

19.1 Tenant will not create nor permit to be created or to remain, and will promptly discharge, at its sole cost and expense, any lien, encumbrance or charge upon the Premises or any part thereof, or upon Tenant's leasehold interest therein, except such as are created by Landlord or the first mortgagee.

## ARTICLE 20

### Environmental Matters.

20.1 Tenant shall not use or store any Hazardous Materials (as defined in Section 20.3) on the Premises, except in compliance with Legal Requirements.

20.2 To the extent directly related to the conduct of Tenant, Tenant's use of the Premises, or the operation of its business thereon, Tenant shall defend, indemnify and hold harmless Landlord, its employees, agents, officers and directors, from and against any claims, demands, penalties, fines, liabilities, settlements, damages, costs or expenses of whatever kind or nature, known or unknown, contingent or otherwise, arising out of, or in any way related to, (1) the presence, disposal or release of any Hazardous Materials by Tenant on, over, under, from or affecting the Premises or the soil, water, vegetation, buildings, personal property, persons thereon by reason of Tenant's action or inaction on the Premises; (2) any personal injury (including wrongful death) or property damage (real or personal) arising out of or related to such Hazardous Materials existing on the Premises by reason of Tenant's action; (3) any lawsuit brought or threatened, settlement reached or government-issued order relating to such Hazardous Materials existing on the Premises by reason of Tenant's action; and/or (4) any violation of Legal Requirements based upon or in any way related to such Hazardous Materials existing on the Premises by reason of Tenant's action including, without limitation, reasonable attorney's and consultant's fees, investigation and laboratory fees, court costs and litigation expenses. As used herein, "**Hazardous Materials**" means and includes petroleum, petroleum products, asbestos, asbestos-containing materials, radioactive materials, waste oils, solvents and chlorinated oils, polychlorinated biphenyls (PCBs), and any other water, material or substance that is defined as hazardous or toxic under or regulated by any federal, state or local agency, law, rule or regulation (whether now existing or hereafter enacted or promulgated, as they may be amended from time to time) pertaining to environmental conditions, the environment, contamination or clean up, including, without limitation, federal, state or local solid waste disposal rules, the Comprehensive Environmental Response, Compensation and Liability Act of 1980, as amended, the Hazardous Materials Transportation Act, as amended, the Resource Conservation and Recovery Act, as amended, the Toxic Substances Control Act, as amended, the Water Pollution Control Act, as amended, the Clean Air Act, as amended, or any other applicable federal, state or local laws, regulations, publications of Governmental Authorities, or ordinances pertaining to Hazardous Materials (collectively, "**Environmental Laws**").

20.3 Tenant shall promptly notify Landlord as soon as it knows of or suspects that any Hazardous Materials has been released or that there is a threatened release on the Premises and it

shall take such action at its sole expense and with due diligence, as is necessary to insure timely compliance with Legal Requirements unless caused by Landlord. Landlord shall promptly notify Tenant as soon as it knows or suspects any Hazardous Materials has been released or that there is a threatened release on or in the Premises and Landlord shall take such action at its sole expense and with due diligence, as is necessary to ensure timely compliance with Legal Requirements unless caused by Tenant.

20.4 The Tenant has no liability for, or obligation to investigate, clean, remove, remediate or otherwise deal with Hazardous Materials present at the Premises prior to the date upon which Tenant first took possession or control of the Premises (it being the intent of the parties that as between Landlord and Tenant, Landlord shall be responsible for the foregoing, except (i) if and to the extent Tenant (its employees, contractors, licensees, officers, directors, or other parties claiming through or acting for Tenant) through its acts or omissions exacerbates such pre-existing condition, or (ii) otherwise provided under any applicable Legal Requirements, laws, ordinances, or regulations.

20.5 The provisions of this Article 20 shall be in addition to any and all obligations and liabilities of Tenant and Landlord may have to each other under Legal Requirements, and shall survive the expiration and termination of the Lease for any reason.

## ARTICLE 21

### Late Charges.

21.1 In the event of any failure by Tenant to pay Rent when due, Tenant shall also pay to Landlord, as Additional Rent, a late charge of five percent (5%) of such delinquent payment.

## ARTICLE 22

### Certain Definitions.

22.1 The term “**Affiliate**” means, with respect to any Person, any other Person that directly or indirectly through one or more intermediaries, controls, or is controlled by, or is under common control with, such first Person or any of its subsidiaries. As used in this definition, the term “control” means (a) the power to vote five percent (5%) or more of the securities or other equity interests of a Person having ordinary voting power, or (b) the possession, directly or indirectly, of any other power to direct or cause the direction of the management and policies of a Person, whether through ownership of voting securities, by contract or otherwise.

22.2 The term “**first mortgage**” means any mortgage now existing or hereafter becoming a first and paramount lien on the Premises, subject to easements and restrictions of record, and all assignments, modifications, extensions and renewals thereof.

22.3 The term “**first mortgagee**” or “**holder of the first mortgage**” means the Person(s) who is(are) the holder(s) or beneficiary(ies) under the first mortgage from time to time.

22.4 The term “**Governmental Authority**” or “**Governmental Authorities**” means the government of the United States of America or any state or other political subdivision of either

thereof, or any entity that exercises executive, legislative, regulatory, administrative, judicial, quasi-governmental or quasi-judicial functions of, or pertaining to, any such government, whether now or hereafter in existence having jurisdiction over the matter or matters in question.

22.5 The term “**Landlord**” is limited to mean and include, so far as covenants, agreements, stipulations or obligations on the part of Landlord are concerned, the tenant under the Master Lease to the Premises or its assignee, at the time in question, and in the event of any transfer or transfers of the title to such fee Landlord herein named (and, in case of any subsequent transfers or conveyances, the then grantor) will automatically be relieved from and after the date of such transfer or conveyance of all personal liability for the performance of any covenants or obligations on the part of Landlord contained in this Lease thereafter to be performed.

22.6 The term “**Legal Requirements**” means (i) all present and future applicable laws, statutes, treaties, rules, orders, ordinances, codes (including, without limitation, building and life-safety codes), regulations, requirements, permits, and interpretations by, and applicable judgments, decrees, injunctions, writs and like action even if unforeseen or extraordinary of any Governmental Authority (including, without limitation, Environmental Laws (defined herein), laws and regulations pertaining to health and safety, Insolvency Laws (defined herein), the Fair Housing Amendments Act of 1988, the Americans with Disabilities Act of 1990, and any other applicable Federal, State or local statute, law, ordinance, code, rule, regulation, order or decree regulating, relating to, or imposing liability or standards of conduct relating to barrier-free access or access of the handicapped or disabled to the Premises, and laws and regulations pertaining to the construction, restoration, use and operation of schools); and (ii) any reciprocal easement agreement, agreement, contract, instrument, restriction or similar agreement relating to the use, occupancy, possession, operation, alterations, repairs or maintenance of the Premises or otherwise affecting the Premises.

22.7 The term “**mortgage**” means any mortgage, deed of trust, deed to secure debt or other security instrument now existing as, or hereafter becoming a lien on the Premises.

22.8 The term “**mortgagee**” means the Person(s) who is(are) the holder(s) or beneficiary(ies) under any mortgage from time to time.

22.9 The term “**Person**” means any natural person, corporation, limited liability company, trust, joint venture, association, company, partnership, Governmental Authority or other entity.

## ARTICLE 23

### **Subordination; Estoppel Certificates.**

23.1 Tenant agrees that Landlord, or any mortgagee or lessor under any applicable ground or other underlying lease, may choose to make this Lease subordinate or paramount to any mortgages or ground or underlying leases now or hereafter affecting the Premises and to any and all advances to be made thereunder or to be secured thereby, and to the interest and charges thereon, and to all renewals, replacements and extensions thereof, and that upon any taking of possession of the Premises and accession to the interest of Landlord under this Lease by such lessor or mortgagee, Tenant shall attorn to and recognize such Person as landlord hereunder; provided

the mortgagee, lessor under any such ground or underlying leases, Landlord or any trustee named in any such mortgages or leases shall agree (i) to recognize the Lease of Tenant in the event of foreclosure if Tenant is not in Default and (ii) that Tenant's possession of the Premises under this Lease shall not be disturbed by such Person unless there is a Default. Tenant will execute promptly any instrument or certificate that Landlord may request to confirm such subordination.

23.2 Tenant, within ten (10) days after request by Landlord, will execute and deliver to Landlord (and any mortgagee or prospective mortgagee, or any current or prospective ground or underlying lessor, to the extent specified by Landlord) an estoppel certificate as to such reasonable facts and circumstances under this Lease as may be requested, but in any case including the following (i) identifying the commencement date and expiration date of this Lease, (ii) stating that this Lease is unmodified and in full force and effect, or is in full force and effect as modified, and then stating such modifications, (iii) stating that Tenant does not claim that Landlord is in default in any way, or listing any such claimed defaults, (iv) the amount of Monthly Installments then payable hereunder and Additional Rent, if any, as of the date of the certificate, (v) the date to which the Rent has been paid in advance, and (vi) the amount of any security deposit or pre-paid Rent. If Tenant fails to deliver the executed certificate to Landlord within the ten (10) day period, Tenant shall be in Default without benefit of any cure period, and the proposed certificate will be conclusively deemed executed by Tenant.

23.3 Upon the receipt of a notice from Landlord, Tenant agrees to pay all such sums owing under this Lease directly to the account or party specified in such notice.

## ARTICLE 24

### Quiet Enjoyment.

24.1 All times when Tenant is not in Default, Tenant's quiet and peaceable enjoyment of the Premises will not be disturbed or interfered with by Landlord or any Person claiming by, through or under Landlord.

## ARTICLE 25

### Holding Over.

25.1 Any holdover by Tenant in the Premises beyond the expiration or termination of the Term (other than pursuant to Article 2), shall not be deemed to be a renewal or extension of this Lease or any extension thereof or the exercise of any option to extend or renew this Lease, but said holding over shall be deemed a tenancy from calendar month to calendar month at a monthly Rent equal to two hundred percent (200%) of the Monthly Installment for the last month paid under the Term. A month-to-month tenancy arising by holding over under this Section may be terminated by either Landlord or Tenant giving written notice to the other party hereto on or before the day any Monthly Installment is due with termination becoming effective on the day the next following Monthly Installment would have otherwise become due.

## ARTICLE 26

### **Remedies Not Exclusive; Waiver.**

26.1 Each and every of the rights, remedies and benefits provided by this Lease to Landlord are cumulative, and are not exclusive of any other of said rights, remedies and benefits, or of any other rights, remedies and benefits allowed by law.

26.2 One or more waivers of any covenant or condition by Landlord will not be construed as a waiver of a further or subsequent breach of the same covenant or condition, and the consent or approval by Landlord to or of any act by Tenant requiring Landlord's consent or approval will not be deemed to waive or render unnecessary Landlord's consent to or approval of any subsequent similar act by Tenant.

## ARTICLE 27

### **Right To Show Premises.**

27.1 Landlord may show the Premises and may display about the Premises signs advertising the availability of the Premises at any time during the Term of this Lease.

## ARTICLE 28

### **Landlord's Liability.**

28.1 If Landlord fails to perform any provision of this Lease upon Landlord's part to be performed, and if as a consequence of such default Tenant recovers a money judgment against Landlord, such judgment may be satisfied only out of the proceeds of sale received upon execution of such judgment (subject to any prior mortgages and ground or underlying leases) and levied thereon against the right, title and interest of Landlord in the Premises and out of rents or other income from such property receivable by Landlord, and Landlord shall not be personally liable for any deficiency.

## ARTICLE 29

### **Termination of Services Agreement.**

29.1 In the event the Services Agreement is terminated by Landlord or Tenant, as party thereto, (a) due to the default of the other party thereto, then upon the giving of notice as required by this Section, the non-defaulting party for purposes of the Services Agreement may, at its option, terminate this Lease without penalty (except as provided in Section 13.1.D hereof), with the effective date of lease termination being the same as the date on which the Services Agreement terminates, (b) pursuant to any of the termination rights or options provided therein other than those arising in the event of a default or breach by the other party to the Services Agreement, then in any such event and upon the giving of notice as required by this Section, Tenant or Landlord may, at its option, terminate this Lease without penalty, with the effective date of lease termination being the same as the date on which the Services Agreement terminates. To exercise any of the termination rights or options provided in the previous sentence, the party so exercising shall notify

the other party hereto of their exercise of any such lease termination right no later than thirty (30) days after the date on which the notice terminating the Services Agreement is sent.

## ARTICLE 30

### General.

30.1 References in this Lease to Persons have been generalized for ease of reading. Therefore, references to a single Person will also mean more than one Person whenever such usage is appropriate (for example, “**Tenant**” may include, if appropriate, a group of Persons acting as a single entity, or as tenants-in-common). Similarly, pronouns of any gender should be considered inter-changeable with pronouns of other genders. If a party consists of more than one Person, such Persons shall be jointly and severally liable for the obligations of such party under this Lease.

30.2 Any waiver or waivers by either party of any of the provisions of this Lease will not constitute a waiver of any later breach of that provision, and any consent or approval given by either such party with respect to any act, neglect or default by the other party will not waive or make unnecessary the other party’s consent or approval with respect to any later similar act, neglect or default by such other party.

30.3 In the event any provision contained herein shall be held to be invalid or unlawful for any reason, such provision shall be deemed to be stricken from this Lease, with the understanding that the remaining provisions hereof shall continue to be binding on the parties.

30.4 Topical headings appearing in this Lease are for convenience only. They do not define, limit or construe the contents of any sections, paragraphs or clauses.

30.5 This Lease can be modified or amended only by a written agreement signed by Landlord and Tenant.

30.6 All provisions of this Lease are and will be binding on the heirs, executors, administrators, personal representatives, successors and assigns of each of Landlord and Tenant.

30.7 The laws of the state in which the Premises are located will control in the construction and enforcement of this Lease, without regard to any laws or policies of such state regarding conflicts of law.

30.8 Time is of the essence of all terms and conditions of this Lease.

30.9 Landlord and Tenant each represent and warrant to the other that neither of them has contacted a broker, finder or similar Person in connection with this Lease, and each party shall defend, indemnify and hold the other harmless from and against all liability, cost and expense, including reasonable attorneys’ fees, incurred as a consequence of any claim asserted by a Person alleging to have dealt with one of the parties hereto in connection with this Lease.

[Signatures on Following Page]

IN WITNESS WHEREOF, the parties hereto have executed this Lease as of the day and year first above written.

**LANDLORD:**

National Heritage Academies, Inc.  
a Michigan corporation

By: \_\_\_\_\_  
Its: Chief Financial Officer

TENANT:

High Point Preparatory Academy

By: \_\_\_\_\_  
Its: Board President

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**EXHIBIT "A"**

**LEGAL DESCRIPTION OF PREMISES**

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# Appendix A4.1: Executed CMO/EMO Contract

## High Point Preparatory Academy

## SERVICES AGREEMENT

THIS SERVICES AGREEMENT (“**Agreement**”) by and between National Heritage Academies, Inc., a Michigan corporation (“**NHA**”), and High Point Preparatory Academy, a North Carolina non-profit corporation (the “**School**”) is executed as of the 6 day of April 2022 and shall become effective as of the Effective Date (as defined in Article II(A) below). For purposes of this Agreement, NHA and the School shall be referred to collectively as the “**Parties**.”

### RECITALS

WHEREAS, the School is applying for a Charter from the North Carolina State Board of Education (the “**Authorizer**”) to operate a public charter school pursuant to N.C. Gen. Stat. § 115C-218 *et seq.* (the “**Authorizing Law**”); and

WHEREAS, the Parties desire to work together to promote educational excellence and innovation based on NHA’s school design, comprehensive educational program and management principles; and

WHEREAS, the Parties desire to set forth the terms and conditions of such a relationship in this Agreement;

NOW, THEREFORE, for good and valuable consideration, including the mutual promise and benefits contained in this Agreement, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

### ARTICLE I

#### CONTRACTING RELATIONSHIP

A. Services. Subject to the terms and conditions of this Agreement, and as permitted by applicable law, the School hereby contracts with NHA for the provision during the Term of certain educational, business administration, facility, and management services, including without limitation, all labor, equipment, and materials necessary for the provision of the same, as set forth herein (collectively, the “**Services**”).

B. Charter. This Agreement shall: (i) be subject to and comply with the terms and conditions of the Charter and the School’s Charter Application (collectively, the “**Charter**”); and (ii) not be construed to interfere with the constitutional, statutory, or fiduciary duties of the School’s Board of Directors (the “**Board**”). In the event of a conflict between any term or condition of this Agreement and any term or condition of the Charter, the term or condition of the Charter shall govern.

C. Independent Contractor. NHA shall provide the Services as an independent contractor, and not as an employee, partner, agent, or associate of the School. This independent contractor relationship shall extend to the officers, directors, employees, and representatives of NHA. Consistent with the status of an independent contractor, NHA reserves to itself the right to

designate the means and methods of accomplishing the objectives and purposes of this Agreement consistent with Authorizing Law and the Charter. The relationship between the Parties is based solely on the terms and conditions of this Agreement, and the terms and conditions of any other written agreement between the Parties.

D. Designations and Appointments.

1. NHA, including its directors, officers, and employees are hereby designated as “other School Officials having a legitimate educational interest in education records” for purposes of the Family Educational Right and Privacy Act, 20 U.S.C. §1232g *et seq.* (FERPA).

2. NHA, its directors, officers, and employees may be designated by the School for other purposes by a written resolution of the Board.

## ARTICLE II

### TERM & TERMINATION

A. Effective Date; Term. This term of this Agreement shall commence on the Effective Date, and unless terminated as set forth herein, shall continue until the termination or expiration of the Charter currently in effect, inclusive of any Charter reauthorization or renewal periods thereof (the “**Term**”). “Effective Date” means the date that the Authorizer approves and issues a fully executed Charter to the School under the policies of the Authorizer and applicable North Carolina law. The parties have executed this Agreement in anticipation that it will automatically spring into existence and become effective on the Effective Date without any further action required from either party. For clarity, the parties shall have no rights, or any obligations to one another whatsoever, under this Agreement unless and until the Effective Date. In the event that the School fails to have a Charter issued by the Authorizer for any reason, this Agreement will automatically terminate without any rights or obligations of either party under this Agreement having ever come into effect. The parties acknowledge that the Authorizer, as part of any reauthorization or renewal, may require that the School and NHA submit an amended or restated Agreement for review by the Authorizer. Assuming that the Effective Date comes to pass, and the Term of this Agreement commences, the first school year under the Term of this Agreement shall commence July 1, 2024 to June 30, 2025, and each school year during the Term thereafter shall commence on July 1 and end on June 30 of the following year.

B. Termination.

1. By NHA. NHA may terminate this Agreement prior to the end of the Term if the Board fails to remedy a material breach of this Agreement within thirty (30) days after receiving a notice from NHA of such breach. For purposes of this Subsection, a material breach (which for the sake of clarity is a default hereunder) includes, but is not limited to: (i) NHA’s failure to timely receive any compensation or reimbursement required by this Agreement; or (ii) a suspension, revocation, or non-renewal of the Charter.

2. By the School. The School may terminate this Agreement prior to the end of the Term if NHA fails to remedy a material breach of this Agreement within (30) days after receiving notice from the School of such breach. For purposes of this Subsection, a material breach (which for the sake of clarity is a default hereunder) includes, but is not limited to: (i) NHA's failure to account for expenditures or pay operating costs pursuant to the Budget (as defined below); (ii) NHA's failure to follow policies, procedures, rules, regulations or curriculum adopted by the Board, provided they do not violate the Charter, applicable law, or this Agreement; (iii) a receipt by the Board of an unsatisfactory report from NHA or an independent education consultant retained by the Board regarding the Services or the School's performance, provided the unsatisfactory performance cannot be adequately corrected or explained; (iv) a determination that this Agreement or its implementation would serve as grounds for suspension, revocation, or non-renewal of the Charter; (v) a determination that this Agreement or its implementation would jeopardize material tax exemptions of the School or its non-profit status; or (vi) any action or inaction by NHA that places the Charter in jeopardy of termination, suspension or revocation.

3. By Either Party. Either party may terminate this Agreement prior to the end of the Term, with or without cause, by providing the other party with at least ninety (90) days' prior written notice.

4. If this Agreement is terminated prior to the end of the Term, and unless otherwise agreed by the Parties, such termination will not become effective until the end of the then-current school year.

C. Effect of Termination. Upon the effective date of termination or expiration of this Agreement:

1. NHA shall have the right to remove from the School any equipment or other assets owned or leased by NHA;

2. The School shall pay or reimburse NHA through the Fee (as defined below) for the prepaid portion of any expenses or liabilities incurred by NHA pursuant to the Budget as of the date of such termination or expiration, provided NHA supplies the School with documentation of all such expenses and liabilities;

3. NHA may agree, in its sole discretion, to assist the School for a reasonable amount of time, not to exceed ninety (90) days, and for a reasonable fee, with the School's transition to another administrative, managerial, or services arrangement;

4. NHA shall, if applicable, reasonably assist the School in the execution of a closure and dissolution plan and cooperate in the closure and dissolution process, including without limitation, in any audits and court or other proceedings related thereto; and

5. The party to whom Confidential Information (as defined below) has been disclosed shall, upon request and at the direction of the disclosing party: (i) return such Confidential Information within thirty (30) days, including any copies thereof, and cease its use; or (ii) destroy such Confidential Information and certify such destruction to the disclosing party,

except for a single copy thereof which may be retained for the sole purpose of determining the scope of any obligations incurred under this Agreement, and except where disclosure or retention is required by applicable law.

### ARTICLE III

#### OBLIGATIONS OF NHA

A. Manager at Risk. NHA shall be responsible and accountable to the Board for providing the Services during the Term. During the Term, NHA shall provide the Services regardless of whether actual revenue meets the level projected in the Budget, and NHA hereby assumes the risk of funding shortfalls during the Term. Notwithstanding the foregoing, NHA shall not be required to expend funds on Services in excess of the amount set forth in the Budget.

B. Comprehensive Educational Program. The School has determined to adopt NHA's proprietary educational and academic programs and goals, as set forth in the Charter (the "**Educational Program**"). Subject to the oversight of the Board, during the Term NHA shall implement and administer the Educational Program. In the event that NHA reasonably determines that it is necessary or advisable to make material changes to the Educational Program, NHA shall inform the Board of the proposed changes and obtain the Board's approval before making such changes, as well as the Authorizer's approval if required by the Charter or applicable law. The Parties acknowledge and agree that an essential principle of the Educational Program is its flexibility, adaptability and capacity to change in the interest of continuous improvement and efficiency. Not less than annually or as reasonably requested by the Board during the Term, NHA shall provide the Board with a report detailing progress made on each of the educational goals set forth in the Educational Program. The school year calendar and the school day schedule shall be approved by the Board as required under the Charter.

C. All Children Welcome. NHA places a high value on diversity, and the School shall welcome students of all races, ethnicity, religion, gender and economic backgrounds.

D. Services to Students with Disabilities. NHA welcomes students with disabilities at the School. NHA shall provide special education and related services, in conformity with the requirements of applicable law, to students who attend the School.

E. Educational and Administrative Services. Subject to the oversight of the Board, during the Term, NHA shall implement operational practices and procedures that are consistent with Board policy, the Charter and applicable law. Such practices and procedures shall include, but are not limited to:

1. Student recruitment and student admissions.
2. Student assessments, including testing, promotion, and retention.

3. The acquisition of instructional materials, equipment and supplies, and the administration of any and all extra-curricular and co-curricular activities and programs included in the Budget.

4. Employment of personnel working at the School and management of all personnel functions, as set forth herein.

5. All aspects of the School's business administration.

6. All aspects of the School's accounting operation, including general ledger management, financial reporting, payroll, employee benefits and payroll tax compliance.

7. All aspects of food services.

8. All aspects of facilities administration and maintenance.

9. Student behavior management and discipline.

F. Location of Services. Other than instruction, and unless prohibited by the Charter or applicable law, NHA may provide the Services, including but not limited to, purchasing, professional development and administrative services, off-site.

G. Subcontracts. NHA reserves the right to subcontract any and all aspects of the Services. NHA shall not subcontract the oversight of the Educational Program, except as specifically permitted in this Agreement or with prior written approval of the Board. Notwithstanding the foregoing, the Board specifically acknowledges and agrees that from time to time NHA may use third parties or independent contractors to assist in the creation and development of Educational Materials (as defined below) that may be used as a part of the Educational Program.

H. Pupil Performance Standards and Evaluation. NHA shall implement pupil performance evaluations that permit evaluation of the academic progress of each School student. NHA shall utilize assessment strategies required by the Charter and applicable law. The Board and NHA shall cooperate in good faith to identify academic goals and methods to assess such academic performance. NHA shall provide the Board with timely reports regarding student performance.

I. Unusual Events. NHA shall timely notify the Board and the Administrator (as defined below) during the Term of any anticipated or known material: (i) health or safety issues, including all mandatory reporting required by applicable law; (ii) labor, employee or funding issues; or (iii) other issues that may reasonably and adversely impact the School's ability to comply with the Charter, applicable law or this Agreement.

J. School Records. The financial and education records pertaining to the School (collectively, the "**School Records**"), are property of the School. Except as may be prohibited or limited by the Charter or applicable law, the School Records shall be available to the Board and the Authorizer for their review, and are subject to inspection and copying to the same extent that records of public schools are subject to inspection and copying pursuant to applicable law. All

School Records shall be physically or electronically available upon request at the School's physical facility. NHA agrees to comply with the terms of the Charter regarding information to be made available to the School.

K. Facility. NHA shall use reasonable efforts to secure a facility to be leased or otherwise provided to the School on terms mutually agreeable to NHA and the Board. Obligations of the Board created under the terms of such lease are to be fulfilled by NHA unless otherwise agreed to in writing by NHA and the Board. The facility shall comply with the requirements of the Charter and applicable law. NHA shall also use reasonable efforts to cause the facility to be furnished with equipment and technology as is reasonably necessary to implement the Educational Program.

L. Legal Compliance. NHA will implement and enforce rules, regulations and procedures applicable to the School that are consistent with adopted Board policy, if any, and the Educational Program in accordance with the Charter and applicable law, including without limitation, rules, regulations, and policies regarding non-discrimination, discipline, special education, confidentiality and access to records.

M. Rules and Procedures. NHA will recommend to the Board reasonable rules, regulations, policies and/or procedures applicable to the School. The Board hereby authorizes and directs NHA to enforce such rules, regulations and procedures consistent with Board policy.

N. Assistance to the Board. NHA shall cooperate with the Board and, to the extent consistent with applicable law, timely furnish the Board with all documents and information necessary for the Board to properly perform its responsibilities under this Agreement.

## ARTICLE IV

### OBLIGATIONS OF THE BOARD

A. Board Policies. The Board shall be responsible for the fiscal and academic policies of the School. The Board shall exercise good faith in considering the recommendations of NHA, including but not limited to, NHA's recommendations regarding policies, rules, regulations and the Budget (as defined below).

B. Assistance to NHA. The Board shall cooperate with NHA and, to the extent consistent with applicable law, timely furnish NHA all documents and information necessary for NHA to properly perform its responsibilities under this Agreement during the Term.

C. Unusual Events. The Board shall timely notify NHA, during the Term, of any anticipated or known material: (i) health or safety issues; (ii) labor, employee or funding issues; or (iii) other issues that may reasonably and adversely impact NHA's ability to comply with the Charter, applicable law, or this Agreement.

D. Office Space. The Board shall provide NHA with suitable office space at the School, provided the requested space is: (i) available and can be provided without materially

prejudicing the Educational Program; and (ii) used only for activities related to the School. The space shall be provided at no cost to NHA.

E. Retained Authority. The Board shall retain the authority to adopt reasonable policies in accordance with applicable law relative to anything necessary for the proper establishment, maintenance, management, and operation of the School.

## ARTICLE V

### INTELLECTUAL PROPERTY

#### A. Definitions.

1. **“Educational Materials”** means all curriculum, print and electronic textbooks, instructional materials, lesson plans, teacher guides, workbooks, tests, and other curriculum-related materials licensed, developed or otherwise owned by the School or NHA.

2. **“Confidential Information”** means any confidential and non-public trade, technical or business knowledge, information and materials regarding the School or NHA (or their respective affiliates), which is given by one party to the other, or any of their respective representatives, in any form, whether printed, written, oral, visual, electronic or in any other media or manner. Confidential Information includes, but is not limited to, research, operations and procedures, financial projections, pricing, sales, expansion plans and strategies, services data, trade secrets and other intellectual property, or the results of any mediation or private adjudication, as well as information with respect to each party’s or its affiliates’ plans for market expansion, except for information which a party can show by contemporaneous written records was developed or formulated independently of work or services performed for, or in connection with performance of, this Agreement. Notwithstanding the foregoing, the disclosure of the other party’s Confidential Information as required to be disclosed by law, rule or regulation or by reason of subpoena, court order or government action shall not constitute a breach of this Agreement; however, in such event the party required to disclose such information will reasonably cooperate with the party whose information is required to be disclosed in order to obtain a protective order applicable to such disclosure. All Confidential Information will remain the sole property of the party disclosing such information or data.

B. School Materials. The School shall own all right, title and interest in and to Educational Materials that are: (i) licensed or owned by the School as of the Effective Date; or (ii) licensed, developed, characterized, conceived, derived, generated, identified, or otherwise made by the School during the Term, provided such materials do not reference the NHA Materials (as defined below), or incorporate any Confidential Information of NHA (collectively, the **“School Materials”**). The School Materials shall include all intellectual property rights associated therewith.

C. NHA Materials. NHA shall own all right, title and interest in and to Educational Materials that are: (i) licensed or owned by NHA as of the Effective Date; (ii) licensed, developed, characterized, conceived, derived, generated, identified, or otherwise made by NHA during the

Term, provided such materials do not reference School Materials or incorporate any Confidential Information of the School; and (iii) any and all Educational Materials and non-curriculum materials provided to the School by NHA relating to the Educational Program, including all changes and derivatives thereof (collectively, the “**NHA Materials**”).

D. Derivative Works. The Parties acknowledge that to the extent any Educational Materials created by the School are derivative of the NHA Materials, use of such derivative materials during the Term is subject to the license granted herein, and the license to use such derivative materials shall cease as of the date of expiration or termination of this Agreement.

E. No Transfer or Sale. The School acknowledges and agrees that NHA is not transferring or selling, and the School is not receiving, purchasing or acquiring, any intellectual property or proprietary rights in or to the NHA Materials.

F. Licenses. NHA hereby grants the School a non-exclusive, non-transferable license (without the right to sublicense) to use the NHA Materials, and any Educational Materials created by the School which are derivative of the NHA Materials, solely in furtherance of the Educational Program during the Term, including without limitation, the right to reproduce, publicly display, distribute and create derivative works of the same, in hard copy format or electronically, within the United States. The School represents and warrants that during the Term, and following the expiration or termination of this Agreement, the School will not exploit or assist any third party to exploit any of the NHA Materials for commercial purposes. Subject to applicable law, the School grants NHA a non-exclusive, irrevocable, worldwide, assignable right to use, distribute, modify and display the School Materials, solely for educational purposes for the School, in any and all media now known or hereafter developed.

G. NHA Marks. During the Term, NHA grants the School a non-exclusive, revocable, non-transferable license (without the right to sublicense) to use NHA’s trade name(s) and NHA’s trademark(s) (the “**NHA Marks**”) solely for the purposes of promoting and advertising the School. NHA shall have the opportunity to review and approve all artwork, copy or other materials utilizing the NHA Marks prior to any production or distribution thereof. All uses of the NHA Marks require NHA’s prior written permission. The School shall acquire no rights in or to the NHA Marks, and all goodwill associated with the NHA Marks shall inure to the benefit of and remain with NHA. Upon expiration or termination of this Agreement, the School shall immediately discontinue use of the NHA Marks and shall remove the NHA Marks from its locations, vehicles, websites, telephone directory listings and all other written or electronic promotional materials.

H. Assignment. Each party shall, and hereby does assign to the other, with full title guarantee and without additional compensation, such right, title and interest in and to any intellectual property as is necessary to fully affect the ownership provisions set out herein, and any accrued rights of action in respect thereof. Each party shall, if so requested by the other, execute all such documents and do all such other acts and things as may be reasonably required to comply with this Agreement to vest in the appropriate party all rights in the relevant intellectual property and shall procure execution by any named inventor of all such documents as may reasonably be required by the other party in connection with any related patent application.

## ARTICLE VI

### SOLICITATION AND USE OF PRIVATE FUNDS

NHA shall seek the Board's approval prior to soliciting any non-governmental grants, donations or contributions on behalf of the School. Any such funds received shall be used solely in accordance with the purpose for which they were solicited, applicable donor restrictions, or as otherwise approved by the Board. Subject to applicable donor restrictions, the Board shall determine the allocation of any such funds subject to this Article that remain unexpended following completion of the project or purpose for which they were originally designated.

## ARTICLE VII

### FINANCIAL ARRANGEMENTS

A. Revenues. Except as provided herein, all monies received by the School during the Term shall be deposited in the School's depository account within three (3) business days with a financial institution acceptable to the Board; provided, however, that upon receipt of a notice from NHA, the School shall pay all such funds owing under this Agreement directly to the account or party specified in such notice. The signatories on the School depository account shall solely be Board members or properly designated Board agents (if any). Interest income earned on the School's depository account shall accrue to the School. Except as specifically excluded by this Agreement, the term "**Revenues**" shall include all funds received by or on behalf of the School, including but not limited to:

1. Funding for public school students enrolled at the School.
2. Special education funding provided by the federal and/or state government that is directly allocable to special education students enrolled at the School.
3. Academically or intellectually gifted funding provided by the federal and/or state government that is directly allocable to academically or intellectually gifted students enrolled at the School.
4. At-risk funding provided by the federal and/or state government that is directly allocable to at-risk students enrolled at the School.
5. Funding provided by the federal and/or state government that is directly allocable to students enrolled at the School with limited English proficiency.
6. All other federal and/or state grant sources, including, but not limited to, Title I and any start-up funding allocable to the School.
7. All other grants and donations received by the School to support or carry out programs at the School (except to the extent NHA is not required or involved in soliciting,

administering or managing the contribution and/or donation, in which case such funds shall be deposited in the Board Spending Account (as defined below)).

8. Fees charged to students as permitted by law for extra services provided by NHA as approved by the Board.

The expenditure of any Revenues received from governmental entities shall be consistent with all applicable regulations and policies. The expenditure of any Revenues received from non-governmental grants, contributions and donations shall be made consistent with the provisions of Article VI.

B. Budget. NHA shall provide the Board with an annual proposed Budget prepared and maintained in accordance with the Charter and applicable law (the “**Budget**”). For the School’s first school year, the Budget shall be submitted prior to the beginning of the school year. Thereafter, the Budget shall be submitted to the Board prior to June 1 for the next school year.

C. Review and Approval of Budget. The Board shall be responsible for reviewing and approving the Budget in accordance with the Charter and applicable law. At the direction of either NHA or the Board, with the approval of the Board, the Budget shall be amended from time to time as necessary.

D. Board Spending Account. Notwithstanding any other provision of this Agreement to the contrary, each school year during the Term, NHA shall allocate to an account controlled by the Board an amount equal to the lesser of: (i) 2% of state per pupil aid reflected in the Budget for that respective school year, or (ii) \$35,000 (the “**Board Spending Account**”). The aforesaid amount shall be deposited by NHA into the Board Spending Account pro-rata during the course of the School’s school year as Revenues are received. All funds in the Board Spending Account are the property of the School and may be used by the School at the discretion of the Board. Funds in the Board Spending Account that are not spent by the School during the school year shall carry over annually. Items purchased by NHA for the School and paid for by the School with funds from the Board Spending Account, such as non-proprietary instructional and/or curriculum materials, books, supplies and equipment, shall be the property of the School. The property of the School excludes items leased, financed or purchased by NHA with the Fee (as defined below). NHA agrees not to add any fees or charges to the cost of equipment, materials or supplies purchased by NHA on behalf of the School with funds from the Board Spending Account. NHA, in making such purchases for the School pursuant to this subsection, shall comply with applicable law, as if the School were making such purchases itself from a third party, and shall provide the Board, upon request, available documentation evidencing the costs associated with such purchases. NHA shall maintain a listing of all assets owned by the School and shall provide the list to the Board annually upon request.

E. Fee. NHA shall receive all Revenues as its services fee (the “**Fee**”), from which it shall pay all operating costs of the School as detailed in the Budget. NHA and the Board acknowledge that operating costs may include an administrative fee payable to the Authorizer as set forth in the Charter. Payment of the Fee shall be made on the same frequency that the School receives its Revenues. NHA shall be entitled to retain as compensation for the Services the

difference, if any, between the Fee and the amount actually expended by NHA in operation and/or management of the School during the School's fiscal year.

F. No Loans. NHA shall not make or extend loans to the Board.

G. Other Schools. The School acknowledges that NHA has entered into similar services agreements with other schools. NHA shall maintain separate accounts for expenses incurred in the operation of the School and other schools assisted by NHA, and shall reflect in the School's financial records only those expenses incurred in the operation of the School. If NHA incurs expenses that are for both the benefit of the School and other schools assisted by NHA, then NHA shall allocate, to the extent permitted by law, such expenses among all such affected schools, including the School, on a prorated basis based upon the number of enrolled students, the number of classrooms, or the number of teachers at the affected schools, or on such other equitable basis as is reasonably determined by NHA. In no event shall marketing costs incurred solely for the benefit of NHA (and not the School) be allocated to the School.

H. Financial Reporting. NHA shall provide the Board with:

1. At least annually, the Budget as required by this Agreement.
2. Monthly, financial statements no more than forty-five (45) days in arrears and at least one week prior to each Board meeting. These financial statements will include a Balance Sheet, Statement of Revenues, Expenditures and Changes in Fund Balance at object level detail with a comparison of budget to actual revenue and expenditures and explanations of variances.
3. Quarterly, or as reasonably requested by the Board, a report on School operations and student performance.
4. As reasonably requested, other information to enable the Board to: (i) evaluate the quality of the Services; and (ii) timely provide all reports and information that are required by the Charter and applicable law.

I. Access to Financial Records. NHA shall keep accurate financial records pertaining to its operation of the School, together with all School financial records prepared by or in possession of NHA, and shall retain all of the aforereferenced records according to the Charter and applicable law to which such books, accounts, and records relate. NHA and the Board shall maintain the proper confidentiality of personnel, students, and other records as required by law. All records shall be kept in accordance with applicable state and federal requirements.

J. Accounting Standards; Annual Audit.

1. The School shall at all times comply with generally accepted public sector accounting principles and applicable law.

2. The Board shall select and retain an independent auditor to conduct an annual audit of the School's financial matters in accordance with the Charter and applicable law.

3. Subject to applicable law, all records in the possession or control of NHA that relate to the School, including but not limited to, financial records, shall be made available to the School and the School's independent auditor. The expense of the annual audit shall be included in the Budget.

K. Start-up Funds; Contributions. NHA shall provide start-up funds for: (i) the development of curriculum, a technology system and a school operations plan; (ii) recruiting, selecting and training of staff members; and (iii) to the extent necessary as reasonably determined by NHA, cleaning, renovating and equipping of the School facility (the "**Start-Up Funds**"). In addition, in its sole discretion, NHA may, but need not, make contributions to the School in the event School expenses exceed Revenues (the "**Contributions**"). The Contributions, if any, shall be in amounts acceptable to NHA and the Board and, once made, shall be included in the Budget. Unless otherwise agreed, the School shall not be legally obligated to repay NHA for the Start-Up Funds or the Contributions. NHA's agreement to make such Contributions shall not be deemed to negate or mitigate the need for the School to apply for or solicit state or federal start-up funds, grants or sub-grants which the School, as a public school, may be eligible to receive.

## ARTICLE VIII

### PERSONNEL & TRAINING

A. Qualified Personnel. NHA shall select and hire qualified personnel to perform the Services. NHA shall have the responsibility and authority, subject to this Article, to select, hire, evaluate, assign, discipline, transfer, and terminate personnel consistent with the Budget, the Charter and applicable law. With the exception of teachers, as set forth below, and unless otherwise agreed by the written consent of the Parties, all School personnel shall be employees of NHA. NHA and the Board each shall be responsible for their respective employees. However, the compensation of all employees working at the School shall be included in the Budget. Upon Board request, NHA shall disclose to the Board the level of compensation and fringe benefits provided by NHA to NHA employees working at the School. A criminal background check and unprofessional conduct search in compliance with applicable law shall be conditions for the hiring of or services provided by any person who will or may be reasonably expected to have unsupervised access to and the care, custody or control of, any School student(s).

B. School Administrator. The School administrator (the "**Administrator**") shall be an employee of NHA and not the Board. The duties and terms of the Administrator's employment shall be determined by NHA. The Administrator shall work with NHA in the operation and management of the School. The accountability of NHA to the School is an essential foundation of this Agreement. Since the Administrator is critical to the School's success, NHA shall have the authority, consistent with this Article, to select, hire, evaluate, assign, discipline, transfer and terminate the Administrator, and to hold the Administrator accountable for the performance of the School. Without limiting the foregoing, NHA shall consult with the Board prior to the placement and/or removal of the Administrator. Absent compelling circumstances, the consultation shall

commence at least ninety (90) days prior to NHA placing and/or removing the Administrator. NHA shall give due consideration to the input, if any, of the Board or the Board's designated representative prior to making a final decision regarding placement and/or removal of the Administrator. NHA shall remove the Administrator if the Board is reasonably dissatisfied with the Administrator's performance. Absent compelling circumstances, however, the Board shall give NHA and the Administrator six (6) months to correct the basis for the Board's reasonable dissatisfaction. The parties agree that the purpose of the above provisions is not to deny the Administrator the opportunity for growth and/or promotion within NHA. Notwithstanding any of the foregoing, the placement of the initial Administrator for the School in its first year of operation shall be made by NHA.

C. Teachers. The Administrator shall recommend to the Board for its consideration and approval, teachers who are qualified in the grade level and subjects required by the School to operate in accordance with the terms of the Charter. All teachers shall be jointly employed by the School and NHA for such purposes as inclusion in the compensation and employee benefit plans of NHA, payroll administration and other employment policies and practices; provided however, in all circumstances, the Board shall ultimately control the hiring and discharge decisions with respect to jointly employed teachers at the School in accordance with N.C. Gen. Stat. § 115C-218.90(1). Teachers assigned to and retained by the School shall hold a valid teaching license issued by the State Board of Education to the extent required by N.C. Gen. Stat. § 115C-218.90(1). Subject to the approval of the Board, such teachers may, in the discretion of NHA, work at the School on a full or part-time basis. If assigned to the School on a part-time basis, such teachers may also work at other schools for which NHA provides services under a similar agreement.

D. Support Staff. NHA shall, consistent with this Article, provide the School with qualified support staff as needed to operate the School in an efficient manner. The support staff may, at the discretion of NHA, work at the School on a full or part time basis. If assigned to the School on a part time basis, the support staff may also work at other schools assisted by NHA. The cost for such support staff shall be shared proportionately among the schools at which the support staff is working. An individual who provides a service to students in the School that is not teaching, and for which a license is required under applicable law, shall have the appropriate license to provide such services.

E. Training. NHA shall provide or procure training in its methods, curriculum, program, and technology to all teaching personnel on a regular basis. Instructional personnel shall be required to obtain at least the minimum hours of professional development as required by applicable law. Non-instructional personnel shall receive training as NHA determines reasonable and necessary under the circumstances.

F. Background Checks and Qualifications. NHA shall comply with applicable law regarding background checks, unprofessional conduct searches and certification/licensure, as applicable, for all persons working in the School.

G. Terms of Employment. No member of the staff at the School shall be subject to any covenant not to compete or other employment restriction as part of the terms of his or her employment with NHA for the Services.

H. Limitations on Discretion. All decisions made by NHA, and any discretion exercised by NHA, in its selection, hiring, evaluation, assignment, discipline, transfer, and termination of personnel, shall be consistent with the Budget, the Charter, the parameters adopted and included in the Educational Program, and applicable law.

## ARTICLE IX

### INDEMNIFICATION

A. Indemnification of Parties. To the extent not prohibited by the Charter or applicable law, the Parties hereby agree to indemnify, defend, and hold the other (the “**Indemnified Party**”), harmless from and against any and all third-party claims, actions, damages, expenses, losses or awards which arise during the Term out of (i) the gross negligence or intentional misconduct of the indemnifying party, (ii) any action taken or not taken by the indemnifying party, or (iii) any noncompliance or breach by the indemnifying party of any of the terms, conditions, warranties, representations, or undertakings contained in or made pursuant to this Agreement. As used herein, Indemnified Party shall include the party’s trustees, directors, officers, employees, agents, representatives and attorneys. The Parties may purchase general liability, property, or other insurance policies. Notwithstanding anything in this Agreement to the contrary, the Board shall not be precluded by the terms of this Agreement from asserting or declining to assert a claim of governmental immunity.

## ARTICLE X

### INSURANCE

A. Insurance Coverage. NHA shall maintain during the Term such policies of insurance as required by the Charter and applicable law. Each party shall, upon request, present evidence to the other that it maintains the requisite insurance in compliance with the provisions of this Article. Each party shall comply with any information or reporting requirements required by the other party’s insurer(s), to the extent reasonably practicable.

B. Workers’ Compensation Insurance. Each party shall maintain during the Term workers’ compensation insurance as required by law, covering their respective employees.

## ARTICLE XI

### REPRESENTATIONS & WARRANTIES

A. Board and School. The Board represents and warrants, for itself and on behalf of the School, that: (i) it is legally vested with all power and authority necessary to execute, deliver and perform this Agreement, including without limitation, the power and authority to contract with a private entity for the provision of educational, business administration and management services; (ii) upon issuance of a Charter it will be legally vested with all power and authority necessary to

operate a charter school under the Authorizing Law; (ii); (iii) its actions have been duly and validly authorized, and it has adopted any and all resolutions or expenditure approvals required for the execution of this Agreement; and (iv) there are no pending actions, claims, suits or proceedings, or, to its knowledge, threatened or reasonably anticipated against or affecting either the Board or the School, which if adversely determined, would have a material adverse effect on its ability to perform under this Agreement.

B. NHA. NHA represents and warrants that: (i) it is a corporation in good standing and is authorized to conduct business in the State of North Carolina; (ii) it is legally vested with all power and authority necessary to execute, deliver and perform this Agreement; (iii) there are no pending actions, claims, suits or proceedings, or, to its knowledge, threatened or reasonably anticipated against or affecting NHA, which if adversely determined, would have a material adverse effect on its ability to perform its obligations under this Agreement; and (iv) it will comply with all registration and licensing requirements relating to conducting business under this Agreement, which the Board agrees to assist NHA in applying for such licenses and permits and in obtaining such approvals and consents.

## ARTICLE XII

### MISCELLANEOUS

A. Entire Agreement. This Agreement and any attachments hereto shall constitute the entire agreement of the Parties on the subject matter set forth herein. This Agreement supersedes and replaces any and all prior agreements and understandings regarding the subject matter set forth herein between the School and NHA.

B. Force Majeure. Except for payment obligations, and notwithstanding any other provisions of this Agreement, neither party shall be liable for any delay in performance or inability to perform due to acts of God, war, riot, embargo, fire, explosion, sabotage, flood, accident, labor strike, or other acts beyond its reasonable control; provided either party may terminate this Agreement in accordance with provisions contained herein if sufficient grounds exist as provided in the Article governing termination.

C. State Governing Law; Waiver of Jury Trial. This Agreement shall be construed, interpreted, governed and enforced pursuant to the laws of the State of North Carolina, without regard to its conflict-of-laws principles. The Parties hereby waive the right to a jury trial in any action, proceeding or counterclaim brought by either NHA or the School against the other.

D. Notices. All notices and other communications required by this Agreement shall be in writing and sent to the Parties at the facsimile number or address set forth below. Notice may be given by: (i) facsimile with written evidence of confirmed receipt by the receiving party of the entire notice; (ii) certified or registered mail, postage prepaid, return receipt requested; or (iii) personal delivery. Notice shall be deemed to have been given on the date of transmittal if given by facsimile, upon the date of postmark if sent by certified or registered mail, or upon the date of delivery if given by personal delivery. For purposes of the foregoing, “**personal delivery**” shall include delivery by nationally recognized overnight courier (such as FedEx), if signed for by the recipient or a delegate thereof. Notices to the School shall be sent to the current address of the

then current Board Chair, with a copy to the then current Board attorney. The addresses of the Parties for the purposes aforesaid, including the address of the initial Board Chair, are as follows:

The School: High Point Preparatory Academy Attn:  
Chair, Board of Directors  
Dr. Kellie J. Jackson  
3415 Langdale Dr. High Point, NC 27265  
Telephone: 336-471-7236  
Facsimile:

WITH A COPY TO:

John Flynn, Carruthers & Roth  
235 N. Edgeworth St., Greensboro, NC  
27401  
Attn:

Telephone: 336-478-1146

NHA: National Heritage Academies, Inc.  
Attn: Chief Financial Officer  
3850 Broadmoor, S.E. Ste. 201 Grand  
Rapids, Michigan 49512 Telephone:  
(616) 222-1700 Facsimile: (616)  
222-1701

WITH A COPY TO:

McShane & Bowie  
Attn: John R. Grant  
1100 Compau Square Plaza  
99 Monroe Ave., NW  
Grand Rapids, Michigan 49501  
Telephone: (616) 732-5013  
Facsimile: (616) 732-5099

E. Assignment. NHA may assign this Agreement with the prior written approval of the Board and in a manner consistent with the Authorizer's policies.

F. Amendment. This Agreement shall not be altered, amended, modified or supplemented except by memorandum approved by the Board and signed by both an authorized officer of the School and NHA and in manner consistent with the Authorizer's policies.

G. Waiver. No waiver of any provision of this Agreement shall be deemed or shall constitute a waiver of any other provision. Nor shall such waiver constitute a continuing waiver unless otherwise expressly stated.

H. Severability. If any term or provision of this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remainder of the terms and provisions set forth herein shall remain in full force and effect and shall in no way be affected, impaired or invalidated, and the Parties shall use their best efforts to find and employ an alternative means to achieve the same or substantially the same result as that contemplated by such term or provision.

I. Delegation of Authority. Nothing in this Agreement shall be construed as delegating to NHA powers or authority of the Board which are not subject to delegation by the Board under the Charter or applicable law.

J. Compliance with Law. Each party will comply with the Charter and laws applicable to the performance of such party's obligations hereunder.

K. Time of Essence. The Parties understand and agree that time is of the essence in performing their respective responsibilities under this Agreement during the Term of this Agreement.

L. Indebtedness. No indebtedness of any kind incurred or created by the charter school shall constitute an indebtedness to the State or its political subdivisions, and no indebtedness of the charter school shall involve or be secured by the faith, credit or taxing power of the State or its political subdivisions. (See NCGS 115C-218 et seq).

[Signatures on Following Page]

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date first written above to be effective as of the Effective Date.

**NHA:**

National Heritage Academies, Inc.,  
a Michigan corporation

By:  \_\_\_\_\_

Its: Chief Financial Officer

**SCHOOL:**

High Point Preparatory Academy  
a North Carolina non-profit corporation

By:  \_\_\_\_\_

Its: Board Chair



# Appendix A3.2: Replication Financial Records (IRS 990)

## High Point Preparatory Academy

Included are the most recent IRS Form 990s for Greensboro Academy (the school we are proposing to replicate). Our Board understands that National Heritage Academies (NHA) is a for-profit organization. They are privately held, and therefore do not submit an IRS Form 990.

Appendix A4.3 – EMO/CMO Financial History details the financial health and stability of NHA.

Form **990**

# Return of Organization Exempt From Income Tax

OMB No. 1545-0047

**2017**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

- ▶ Do not enter social security numbers on this form as it may be made public.
- ▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

**A** For the **2017** calendar year, or tax year beginning **07/01, 2017**, and ending **06/30, 2018**

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization GREENSBORO ACADEMY, INC.				<b>D</b> Employer identification number 56-2108613	
	Doing business as				<b>E</b> Telephone number (616) 222-1700	
	Number and street (or P.O. box if mail is not delivered to street address)		Room/suite			
	City or town, state or province, country, and ZIP or foreign postal code GREENSBORO, NC 27410-8410				<b>G</b> Gross receipts \$ <b>6,410,376.</b>	
<b>F</b> Name and address of principal officer: ZACH SCHWARZ 4049 BATTLEGROUNDAVE GREENSBORO, NC 27410-8410						
<b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) ◀ (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		<b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		<b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No		
<b>J</b> Website: WWW.NHASCHOOLS.COM				<b>H(c)</b> Group exemption number ▶		
<b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶			<b>L</b> Year of formation: 1998		<b>M</b> State of legal domicile: NC	

**Part I Summary**

<b>Activities &amp; Governance</b>	<b>1</b> Briefly describe the organization's mission or most significant activities: TO OPERATE A PUBLIC SCHOOL ACADEMY WHICH PROVIDES EDUCATION BASED ON RIGOROUS TEACHING METHODS, PARENTAL INVOLVEMENT, STUDENT RESPONSIBILITY, AND BASIC MORAL VALUES.		
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b>	5.	
	<b>4</b>	5.	
	<b>5</b>	0.	
	<b>6</b>	774.	
	<b>7a</b>	0.	
<b>7b</b>			
<b>Revenue</b>	<b>8</b>	<b>Prior Year</b>	<b>Current Year</b>
	Contributions and grants (Part VIII, line 1h)	5,945,115.	6,234,201.
	Program service revenue (Part VIII, line 2g)	127,427.	141,175.
	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	0.	0.
	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	35,000.	35,000.
	<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>6,107,542.</b>	<b>6,410,376.</b>
<b>Expenses</b>	<b>13</b>	<b>Prior Year</b>	<b>Current Year</b>
	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.	0.
	Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	2,670,097.	2,888,062.
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶	0.	
Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	3,447,213.	3,530,660.	
<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	<b>6,117,310.</b>	<b>6,418,722.</b>	
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	<b>-9,768.</b>	<b>-8,346.</b>	
<b>Net Assets or Fund Balances</b>	<b>20</b>	<b>Beginning of Current Year</b>	<b>End of Year</b>
	Total assets (Part X, line 16)	129,422.	138,450.
	Total liabilities (Part X, line 26)	33,381.	50,755.
<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	<b>96,041.</b>	<b>87,695.</b>	

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer ZACH SCHWARZ		Date PRESIDENT		
	Type or print name and title				
<b>Paid Preparer Use Only</b>	Print/Type preparer's name JACOB COOK	Preparer's signature 	Date 02/15/2019	Check <input type="checkbox"/> if self-employed	PTIN P01240455
	Firm's name ▶ BDO USA, LLP		Firm's EIN ▶ 13-5381590		
	Firm's address ▶ 200 OTTAWA AVE NW STE 300 GRAND RAPIDS, MI 49503		Phone no. 616-774-7000		

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

For Paperwork Reduction Act Notice, see the separate instructions. Form **990** (2017)

Form **8868**

(Rev. January 2017)

Department of the Treasury  
Internal Revenue Service

# Application for Automatic Extension of Time To File an Exempt Organization Return

► **File a separate application for each return.**  
► **Information about Form 8868 and its instructions is at [www.irs.gov/form8868](http://www.irs.gov/form8868).**

OMB No. 1545-1709

**Electronic filing (e-file).** You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile), click on Charities & Non-Profits, and click on e-file for *Charities and Non-Profits*.

**Automatic 6-Month Extension of Time.** Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

	Enter filer's identifying number, see instructions	
<b>Type or print</b>  <small>File by the due date for filing your return. See instructions.</small>	Name of exempt organization or other filer, see instructions.  GREENSBORO ACADEMY, INC.	Employer identification number (EIN) or  56-2108613
	Number, street, and room or suite no. If a P.O. box, see instructions. 4049 BATTLEGROUND AVE	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. GREENSBORO, NC 27410-8410	

Enter the Return Code for the return that this application is for (file a separate application for each return) . . . . . 01

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

ANNE SHERMAN

• The books are in the care of ► 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS MI 49512

Telephone No. ► 616 222-1700 Fax No. ► 616 831-6311

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ . If this is for the whole group, check this box  . If it is for part of the group, check this box  and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 6-month extension of time until 05/15, 2019, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- calendar year 20 \_\_\_\_ or
- tax year beginning 07/01, 2017, and ending 06/30, 2018.

2 If the tax year entered in line 1 is for less than 12 months, check reason:  Initial return  Final return  Change in accounting period

<b>3a</b> If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$ 0.
<b>b</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$ 0.
<b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$ 0.

**Caution.** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2017)

**Part III Statement of Program Service Accomplishments**

Check if Schedule O contains a response or note to any line in this Part III  Yes  No

1 Briefly describe the organization's mission:

ATTACHMENT 1

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?  Yes  No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?  Yes  No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ 5,056,447. including grants of \$ ) (Revenue \$ 141,175. )

OPERATED AN EDUCATIONAL INSTITUTION ORGANIZED AS A PUBLIC SCHOOL ACADEMY. THE ACADEMY PROVIDES EDUCATION, AT NO COST TO THE PARENT, TO STUDENTS IN KINDERGARTEN THROUGH EIGHTH GRADE. THE ACADEMY OPERATES UNDER A CHARTER APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION.

4b (Code: ) (Expenses \$ 7,445. including grants of \$ ) (Revenue \$ )

OPERATED A SCHOOL FOOD SERVICE PROGRAM AT THE PUBLIC SCHOOL ACADEMY DESCRIBED ABOVE. THE ACADEMY OFFERS FREE OR REDUCED LUNCH FOR FAMILIES THAT QUALIFY.

4c (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4d Other program services (Describe in Schedule O.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses 5,063,892.

**Part IV Checklist of Required Schedules**

	Yes	No
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A.</i> . . . . .	X	
<b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> (see instructions)? . . . . .	X	
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I.</i> . . . . .		X
<b>4</b> <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II.</i> . . . . .		X
<b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III.</i> . . . . .		X
<b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I.</i> . . . . .		X
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II.</i> . . . . .		X
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III.</i> . . . . .		X
<b>9</b> Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV.</i> . . . . .		X
<b>10</b> Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V.</i> . . . . .		X
<b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
<b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI.</i> . . . . .	X	
<b>b</b> Did the organization report an amount for investments-other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII.</i> . . . . .		X
<b>c</b> Did the organization report an amount for investments-program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII.</i> . . . . .		X
<b>d</b> Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX.</i> . . . . .		X
<b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X.</i> . . . . .	X	
<b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X.</i> . . . . .		X
<b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII.</i> . . . . .	X	
<b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional.</i> . . . . .		X
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E.</i> . . . . .	X	
<b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States? . . . . .		X
<b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV.</i> . . . . .		X
<b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV.</i> . . . . .		X
<b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV.</i> . . . . .		X
<b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I</i> (see instructions). . . . .		X
<b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II.</i> . . . . .		X
<b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III.</i> . . . . .		X

**Part IV Checklist of Required Schedules (continued)**

	Yes	No
<b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H.</i> . . . . .		X
<b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? . . . . .		
<b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II.</i> . . . . .		X
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III.</i> . . . . .		X
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J.</i> . . . . .		X
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a.</i> . . . . .		X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . . .		
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .		
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . . .		
<b>25a</b> <b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I.</i> . . . . .		X
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I.</i> . . . . .		X
<b>26</b> Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II.</i> . . . . .		X
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III.</i> . . . . .		X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV.</i> . . . . .		X
<b>b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV.</i> . . . . .		X
<b>c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV.</i> . . . . .		X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M.</i> . . . . .		X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M.</i> . . . . .		X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I.</i> . . . . .		X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II.</i> . . . . .		X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I.</i> . . . . .		X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1.</i> . . . . .		X
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? . . . . .		X
<b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2.</i> . . . . .		
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2.</i> . . . . .		X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI.</i> . . . . .		X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O.	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V

Table with columns for question numbers (1a-14b), Yes/No checkboxes, and input fields. Contains questions about Form 1096, Form W-2G, Form W-3, Form 990-T, Form 8886-T, Form 8282, Form 8899, Form 1098-C, Form 4966, Form 720, and Form 702.

**Part VI Governance, Management, and Disclosure** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

**Section A. Governing Body and Management**

	Yes	No
<b>1a</b> Enter the number of voting members of the governing body at the end of the tax year . . . . . If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O. <span style="float:right">1a 5</span>		
<b>b</b> Enter the number of voting members included in line 1a, above, who are independent . . . . . <span style="float:right">1b 5</span>		
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? . . . . .		X
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person? . .	X	
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? . . . . .		X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets? . . . .		X
<b>6</b> Did the organization have members or stockholders? . . . . .		X
<b>7a</b> Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? . . . . .		X
<b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? . . . . .		X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b> The governing body? . . . . .	X	
<b>b</b> Each committee with authority to act on behalf of the governing body? . . . . .	X	
<b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? <i>If "Yes," provide the names and addresses in Schedule O . . . . .</i>		X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
<b>10a</b> Did the organization have local chapters, branches, or affiliates? . . . . .		X
<b>b</b> If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? . .		
<b>11a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? .	X	
<b>b</b> Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
<b>12a</b> Did the organization have a written conflict of interest policy? <i>If "No," go to line 13 . . . . .</i>	X	
<b>b</b> Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? . . . . .	X	
<b>c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? <i>If "Yes," describe in Schedule O how this was done . . . . .</i>	X	
<b>13</b> Did the organization have a written whistleblower policy? . . . . .		X
<b>14</b> Did the organization have a written document retention and destruction policy? . . . . .	X	
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>a</b> The organization's CEO, Executive Director, or top management official . . . . .		X
<b>b</b> Other officers or key employees of the organization . . . . .		X
If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).		
<b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? . . . . .		X
<b>b</b> If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? . . . . .		

**Section C. Disclosure**

- 17** List the states with which a copy of this Form 990 is required to be filed ► NONE
- 18** Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
 Own website     Another's website     Upon request     Other (explain in Schedule O)
- 19** Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records: ►  
COREY BALKON 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS, MI 49512 (616) 222-1700

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII.

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) ZACH SCHWARZ PRESIDENT	1.00 0.	X		X				0.	0.	0.
(2) ALAN HAWKES DIRECTOR	1.00 0.	X						0.	0.	0.
(3) HANK HENNING SECRETARY/TREASURER	1.00 0.	X		X				0.	0.	0.
(4) RUDY BINDER DIRECTOR	1.00 0.	X						0.	0.	0.
(5) ROBERT GRAY VICE PRESIDENT	1.00 0.	X		X				0.	0.	0.
(6)										
(7)										
(8)										
(9)										
(10)										
(11)										
(12)										
(13)										
(14)										



**Part VIII Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII.

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514	
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1a</b> Federated campaigns . . . . .	<b>1a</b>						
	<b>b</b> Membership dues . . . . .	<b>1b</b>						
	<b>c</b> Fundraising events . . . . .	<b>1c</b>						
	<b>d</b> Related organizations . . . . .	<b>1d</b>						
	<b>e</b> Government grants (contributions) . . . . .	<b>1e</b>	6,234,201.					
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above . . . . .	<b>1f</b>						
	<b>g</b> Noncash contributions included in lines 1a-1f: \$ . . . . .							
	<b>h Total.</b> Add lines 1a-1f . . . . . ▶			6,234,201.				
	<b>Program Service Revenue</b>	<b>2a</b> MISCELLANEOUS ACTIVITY FEES	<b>Business Code</b>	900099	141,175.	141,175.		
<b>b</b> _____								
<b>c</b> _____								
<b>d</b> _____								
<b>e</b> _____								
<b>f</b> All other program service revenue . . . . .								
<b>g Total.</b> Add lines 2a-2f . . . . . ▶				141,175.				
<b>Other Revenue</b>	<b>3</b> Investment income (including dividends, interest, and other similar amounts). . . . . ▶			0.				
	<b>4</b> Income from investment of tax-exempt bond proceeds . ▶			0.				
	<b>5</b> Royalties . . . . . ▶			0.				
	<b>6a</b> Gross rents . . . . .	(i) Real	(ii) Personal					
		<b>b</b> Less: rental expenses . . . . .						
		<b>c</b> Rental income or (loss) . . . . .						
		<b>d</b> Net rental income or (loss) . . . . . ▶			0.			
	<b>7a</b> Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other					
		<b>b</b> Less: cost or other basis and sales expenses . . . . .						
		<b>c</b> Gain or (loss) . . . . .						
		<b>d</b> Net gain or (loss) . . . . . ▶			0.			
	<b>8a</b> Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18 . . . . . <b>a</b>							
		<b>b</b> Less: direct expenses . . . . . <b>b</b>						
		<b>c</b> Net income or (loss) from fundraising events . . . . . ▶			0.			
	<b>9a</b> Gross income from gaming activities. See Part IV, line 19 . . . . . <b>a</b>							
<b>b</b> Less: direct expenses . . . . . <b>b</b>								
<b>c</b> Net income or (loss) from gaming activities . . . . . ▶				0.				
<b>10a</b> Gross sales of inventory, less returns and allowances . . . . . <b>a</b>								
	<b>b</b> Less: cost of goods sold . . . . . <b>b</b>							
	<b>c</b> Net income or (loss) from sales of inventory . . . . . ▶			0.				
Miscellaneous Revenue			<b>Business Code</b>					
<b>11a</b> DISCRETIONARY SUPPORT		611710	35,000.			35,000.		
<b>b</b> _____								
<b>c</b> _____								
<b>d</b> All other revenue . . . . .								
<b>e Total.</b> Add lines 11a-11d . . . . . ▶			35,000.					
<b>12 Total revenue.</b> See instructions. . . . . ▶			6,410,376.	141,175.		35,000.		

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX  X

<b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b>	<b>(A)</b> Total expenses	<b>(B)</b> Program service expenses	<b>(C)</b> Management and general expenses	<b>(D)</b> Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 . . . . .	0.			
2 Grants and other assistance to domestic individuals. See Part IV, line 22 . . . . .	0.			
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 . . . . .	0.			
4 Benefits paid to or for members . . . . .	0.			
5 Compensation of current officers, directors, trustees, and key employees . . . . .	0.			
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .	0.			
7 Other salaries and wages . . . . .	2,190,324.	2,190,324.		
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	51,935.	51,935.		
9 Other employee benefits . . . . .	482,528.	482,528.		
10 Payroll taxes . . . . .	163,275.	163,275.		
11 Fees for services (non-employees):				
a Management . . . . .	0.			
b Legal . . . . .	0.			
c Accounting . . . . .	165,277.	9,125.	156,152.	
d Lobbying . . . . .	0.			
e Professional fundraising services. See Part IV, line 17.	0.			
f Investment management fees . . . . .	0.			
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.) . . . . .	293,009.	293,009.		
12 Advertising and promotion . . . . .	58,810.	88.	58,722.	
13 Office expenses . . . . .	261,726.	261,726.		
14 Information technology . . . . .	220,961.	13,734.	207,227.	
15 Royalties . . . . .	0.			
16 Occupancy . . . . .	1,391,268.	1,380,057.	11,211.	
17 Travel . . . . .	6,410.	6,410.		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	0.			
19 Conferences, conventions, and meetings . . . . .	51,490.	51,490.		
20 Interest . . . . .	0.			
21 Payments to affiliates . . . . .	0.			
22 Depreciation, depletion, and amortization . . . . .	6,885.	6,885.		
23 Insurance . . . . .	21,023.	21,023.		
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a HUMAN RESOURCES	263,843.		263,843.	
b INSTRUCTIONAL SUPPORT	264,348.		264,348.	
c ACADEMIC & GENERAL SUPPORT	173,754.		173,754.	
d DISCRETIONARY EXPENSES	90,977.		90,977.	
e All other expenses	260,879.	132,283.	128,596.	
<b>25 Total functional expenses.</b> Add lines 1 through 24e	<b>6,418,722.</b>	<b>5,063,892.</b>	<b>1,354,830.</b>	
<b>26 Joint costs.</b> Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720) . . . . .	0.			

**Part X Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part X.

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing . . . . .	44,638.	<b>1</b>	78,968.
	<b>2</b> Savings and temporary cash investments . . . . .	0.	<b>2</b>	0.
	<b>3</b> Pledges and grants receivable, net . . . . .	12,303.	<b>3</b>	13,963.
	<b>4</b> Accounts receivable, net . . . . .	0.	<b>4</b>	0.
	<b>5</b> Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L . . . . .	0.	<b>5</b>	0.
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L . . . . .	0.	<b>6</b>	0.
	<b>7</b> Notes and loans receivable, net . . . . .	0.	<b>7</b>	0.
	<b>8</b> Inventories for sale or use . . . . .	0.	<b>8</b>	0.
	<b>9</b> Prepaid expenses and deferred charges . . . . .	20,077.	<b>9</b>	0.
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	<b>10a</b> 134,762.		
	<b>b</b> Less: accumulated depreciation . . . . .	<b>10b</b> 89,243.	52,404.	<b>10c</b> 45,519.
	<b>11</b> Investments - publicly traded securities . . . . .	0.	<b>11</b>	0.
	<b>12</b> Investments - other securities. See Part IV, line 11 . . . . .	0.	<b>12</b>	0.
	<b>13</b> Investments - program-related. See Part IV, line 11 . . . . .	0.	<b>13</b>	0.
	<b>14</b> Intangible assets . . . . .	0.	<b>14</b>	0.
	<b>15</b> Other assets. See Part IV, line 11 . . . . .	0.	<b>15</b>	0.
<b>16 Total assets.</b> Add lines 1 through 15 (must equal line 34) . . . . .	129,422.	<b>16</b>	138,450.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .	0.	<b>17</b>	0.
	<b>18</b> Grants payable . . . . .	0.	<b>18</b>	0.
	<b>19</b> Deferred revenue . . . . .	33,381.	<b>19</b>	29,827.
	<b>20</b> Tax-exempt bond liabilities . . . . .	0.	<b>20</b>	0.
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D . . . . .	0.	<b>21</b>	0.
	<b>22</b> Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L . . . . .	0.	<b>22</b>	0.
	<b>23</b> Secured mortgages and notes payable to unrelated third parties . . . . .	0.	<b>23</b>	0.
	<b>24</b> Unsecured notes and loans payable to unrelated third parties . . . . .	0.	<b>24</b>	0.
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D . . . . .	0.	<b>25</b>	20,928.
	<b>26 Total liabilities.</b> Add lines 17 through 25 . . . . .	33,381.	<b>26</b>	50,755.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117 (ASC 958), check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27 through 29, and lines 33 and 34.</b>			
	<b>27</b> Unrestricted net assets . . . . .	96,041.	<b>27</b>	87,695.
	<b>28</b> Temporarily restricted net assets . . . . .	0.	<b>28</b>	0.
	<b>29</b> Permanently restricted net assets . . . . .	0.	<b>29</b>	0.
	<b>Organizations that do not follow SFAS 117 (ASC 958), check here</b> <input type="checkbox"/> <b>and complete lines 30 through 34.</b>			
	<b>30</b> Capital stock or trust principal, or current funds . . . . .		<b>30</b>	
	<b>31</b> Paid-in or capital surplus, or land, building, or equipment fund . . . . .		<b>31</b>	
	<b>32</b> Retained earnings, endowment, accumulated income, or other funds . . . . .		<b>32</b>	
	<b>33</b> Total net assets or fund balances . . . . .	96,041.	<b>33</b>	87,695.
	<b>34</b> Total liabilities and net assets/fund balances . . . . .	129,422.	<b>34</b>	138,450.

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI.

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12) . . . . .	<b>1</b>	6,410,376.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25) . . . . .	<b>2</b>	6,418,722.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1 . . . . .	<b>3</b>	-8,346.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) . . . . .	<b>4</b>	96,041.
<b>5</b>	Net unrealized gains (losses) on investments . . . . .	<b>5</b>	0.
<b>6</b>	Donated services and use of facilities . . . . .	<b>6</b>	0.
<b>7</b>	Investment expenses . . . . .	<b>7</b>	0.
<b>8</b>	Prior period adjustments . . . . .	<b>8</b>	0.
<b>9</b>	Other changes in net assets or fund balances (explain in Schedule O) . . . . .	<b>9</b>	0.
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B)) . . . . .	<b>10</b>	87,695.

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII.

- 1** Accounting method used to prepare the Form 990:  Cash  Accrual  Other \_\_\_\_\_  
If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.
- 2a** Were the organization's financial statements compiled or reviewed by an independent accountant? . . . . .  
If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- b** Were the organization's financial statements audited by an independent accountant? . . . . .  
If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- c** If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.
- 3a** As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? . . . . .
- b** If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.

	Yes	No
<b>2a</b>		X
<b>2b</b>	X	
<b>2c</b>	X	
<b>3a</b>		X
<b>3b</b>		

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

**Public Charity Status and Public Support**

OMB No. 1545-0047

**2017**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Name of the organization

GREENSBORO ACADEMY, INC.

Employer identification number

56-2108613

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2  A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990 or 990-EZ).)
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8  A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9  An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10  An organization that normally receives: (1) more than 33 1/3 % of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3 % of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 11  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**.  
Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
  - a  **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b  **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c  **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d  **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e  Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
  - f Enter the number of supported organizations. . . . .
  - g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
<b>Total</b>						

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule A (Form 990 or 990-EZ) 2017

JSA  
7E1210 1.000

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)
(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Table with 7 columns: (a) 2013, (b) 2014, (c) 2015, (d) 2016, (e) 2017, (f) Total. Rows include: 1 Gifts, grants, contributions, and membership fees received; 2 Tax revenues levied for the organization's benefit; 3 The value of services or facilities furnished by a governmental unit; 4 Total. Add lines 1 through 3; 5 The portion of total contributions by each person; 6 Public support. Subtract line 5 from line 4.

Section B. Total Support

Table with 7 columns: (a) 2013, (b) 2014, (c) 2015, (d) 2016, (e) 2017, (f) Total. Rows include: 7 Amounts from line 4; 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources; 9 Net income from unrelated business activities; 10 Other income. Do not include gain or loss from the sale of capital assets; 11 Total support. Add lines 7 through 10; 12 Gross receipts from related activities, etc. (see instructions); 13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here.

Section C. Computation of Public Support Percentage

Table with 3 columns: Line number, Description, and Percentage. Rows include: 14 Public support percentage for 2017; 15 Public support percentage from 2016 Schedule A, Part II, line 14; 16a 33 1/3% support test - 2017; 16b 33 1/3% support test - 2016; 17a 10%-facts-and-circumstances test - 2017; 17b 10%-facts-and-circumstances test - 2016; 18 Private foundation.

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**  
 (Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II.  
 If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose . . . . .						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 . . . . .						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .						
<b>6 Total.</b> Add lines 1 through 5 . . . . .						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons . . . . .						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year . . . . .						
<b>c</b> Add lines 7a and 7b . . . . .						
<b>8 Public support.</b> (Subtract line 7c from line 6.) . . . . .						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
<b>9</b> Amounts from line 6 . . . . .						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources . . . . .						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 . . . . .						
<b>c</b> Add lines 10a and 10b . . . . .						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on . . . . .						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . . . .						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.) . . . . .						

**14 First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** . . . . .

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2017 (line 8, column (f) divided by line 13, column (f)). . . . .	<b>15</b>	%
<b>16</b> Public support percentage from 2016 Schedule A, Part III, line 15 . . . . .	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for <b>2017</b> (line 10c, column (f) divided by line 13, column (f)) . . . . .	<b>17</b>	%
<b>18</b> Investment income percentage from <b>2016</b> Schedule A, Part III, line 17 . . . . .	<b>18</b>	%

**19a 33 1/3% support tests - 2017.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization .

**b 33 1/3% support tests - 2016.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

**Part IV Supporting Organizations**

(Complete only if you checked a box in line 12 on Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i>		
<b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
<b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.</i>		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
<b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
<b>b Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
<b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
<b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
<b>b</b> Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>c</b> Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>10a</b> Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer 10b below.</i>		
<b>b</b> Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

**Part IV Supporting Organizations (continued)**

	Yes	No
<b>11</b> Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b> A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?		
<b>b</b> A family member of a person described in (a) above?		
<b>c</b> A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in <b>Part VI</b> .		

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If "No," describe in <b>Part VI</b> how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
<b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in <b>Part VI</b> how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		

**Section D. All Type III Supporting Organizations**

	Yes	No
<b>1</b> Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
<b>2</b> Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in <b>Part VI</b> how the organization maintained a close and continuous working relationship with the supported organization(s).		
<b>3</b> By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in <b>Part VI</b> the role the organization's supported organizations played in this regard.		

**Section E. Type III Functionally Integrated Supporting Organizations**

<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
<b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete <b>line 2</b> below.			
<b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete <b>line 3</b> below.			
<b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in <b>Part VI</b> how you supported a government entity (see instructions).			
<b>2</b> Activities Test. Answer (a) and (b) below.		Yes	No
<b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in <b>Part VI</b> identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.			
<b>b</b> Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in <b>Part VI</b> the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.			
<b>3</b> Parent of Supported Organizations. Answer (a) and (b) below.			
<b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in <b>Part VI</b> .			
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in <b>Part VI</b> the role played by the organization in this regard.			

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

<b>Section A - Adjusted Net Income</b>		(A) Prior Year	(B) Current Year (optional)
<b>1</b> Net short-term capital gain	<b>1</b>		
<b>2</b> Recoveries of prior-year distributions	<b>2</b>		
<b>3</b> Other gross income (see instructions)	<b>3</b>		
<b>4</b> Add lines 1 through 3.	<b>4</b>		
<b>5</b> Depreciation and depletion	<b>5</b>		
<b>6</b> Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	<b>6</b>		
<b>7</b> Other expenses (see instructions)	<b>7</b>		
<b>8 Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4).	<b>8</b>		
<b>Section B - Minimum Asset Amount</b>		(A) Prior Year	(B) Current Year (optional)
<b>1</b> Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):			
<b>a</b> Average monthly value of securities	<b>1a</b>		
<b>b</b> Average monthly cash balances	<b>1b</b>		
<b>c</b> Fair market value of other non-exempt-use assets	<b>1c</b>		
<b>d Total</b> (add lines 1a, 1b, and 1c)	<b>1d</b>		
<b>e Discount</b> claimed for blockage or other factors (explain in detail in <b>Part VI</b> ):			
<b>2</b> Acquisition indebtedness applicable to non-exempt-use assets	<b>2</b>		
<b>3</b> Subtract line 2 from line 1d.	<b>3</b>		
<b>4</b> Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions).	<b>4</b>		
<b>5</b> Net value of non-exempt-use assets (subtract line 4 from line 3)	<b>5</b>		
<b>6</b> Multiply line 5 by .035.	<b>6</b>		
<b>7</b> Recoveries of prior-year distributions	<b>7</b>		
<b>8 Minimum Asset Amount</b> (add line 7 to line 6)	<b>8</b>		
<b>Section C - Distributable Amount</b>			Current Year
<b>1</b> Adjusted net income for prior year (from Section A, line 8, Column A)	<b>1</b>		
<b>2</b> Enter 85% of line 1.	<b>2</b>		
<b>3</b> Minimum asset amount for prior year (from Section B, line 8, Column A)	<b>3</b>		
<b>4</b> Enter greater of line 2 or line 3.	<b>4</b>		
<b>5</b> Income tax imposed in prior year	<b>5</b>		
<b>6 Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	<b>6</b>		
<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).			

Schedule A (Form 990 or 990-EZ) 2017

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)**

Section D - Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in Part VI). See instructions.	
7 <b>Total annual distributions.</b> Add lines 1 through 6.	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	
9 Distributable amount for 2017 from Section C, line 6	
10 Line 8 amount divided by Line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2017	(iii) Distributable Amount for 2017
1 Distributable amount for 2017 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2017 (reasonable cause required-explain in Part VI). See instructions.			
3 Excess distributions carryover, if any, to 2017			
<b>a</b>			
<b>b</b> From 2013 . . . . .			
<b>c</b> From 2014 . . . . .			
<b>d</b> From 2015 . . . . .			
<b>e</b> From 2016 . . . . .			
<b>f</b> <b>Total</b> of lines 3a through e			
<b>g</b> Applied to underdistributions of prior years			
<b>h</b> Applied to 2017 distributable amount			
<b>i</b> Carryover from 2012 not applied (see instructions)			
<b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2017 from Section D, line 7:                     \$			
<b>a</b> Applied to underdistributions of prior years			
<b>b</b> Applied to 2017 distributable amount			
<b>c</b> Remainder. Subtract lines 4a and 4b from 4.			
5 Remaining underdistributions for years prior to 2017, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.			
6 Remaining underdistributions for 2017. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.			
7 <b>Excess distributions carryover to 2018.</b> Add lines 3j and 4c.			
8 Breakdown of line 7:			
<b>a</b> Excess from 2013 . . . .			
<b>b</b> Excess from 2014 . . . .			
<b>c</b> Excess from 2015 . . . .			
<b>d</b> Excess from 2016 . . . .			
<b>e</b> Excess from 2017 . . . .			

**Part VI** **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

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**Schedule B**  
 (Form 990, 990-EZ,  
 or 990-PF)  
 Department of the Treasury  
 Internal Revenue Service

**Schedule of Contributors**

OMB No. 1545-0047

**2017**

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**  
 ▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.**

**Name of the organization**

GREENSBORO ACADEMY, INC.

**Employer identification number**

56-2108613

**Organization type** (check one):

**Filers of:**

**Section:**

Form 990 or 990-EZ

501(c)(3) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year . . . . . ▶ \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

**Name of organization** GREENSBORO ACADEMY, INC.

**Employer identification number**  
56-2108613

**Part I** **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		\$ 4,227,908.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2		\$ 1,868,432.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3		\$ 137,861.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization **GREENSBORO ACADEMY, INC.**

Employer identification number

56-2108613

**Part II** **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____

Name of organization **GREENSBORO ACADEMY, INC.**

Employer identification number

56-2108613

**Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor.** Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$ \_\_\_\_\_  
 Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____ _____	_____ _____ _____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____ _____	_____ _____ _____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____ _____	_____ _____ _____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____ _____	_____ _____ _____

SCHEDULE D (Form 990)

Supplemental Financial Statements

OMB No. 1545-0047

2017

Open to Public Inspection

Department of the Treasury Internal Revenue Service

Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

Name of the organization

GREENSBORO ACADEMY, INC.

Employer identification number

56-2108613

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

Table with 2 columns: (a) Donor advised funds, (b) Funds and other accounts. Rows include: 1 Total number at end of year, 2 Aggregate value of contributions to (during year), 3 Aggregate value of grants from (during year), 4 Aggregate value at end of year, 5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?, 6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?

Part II Conservation Easements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

Table with 2 columns: Held at the End of the Tax Year. Rows include: 1 Purpose(s) of conservation easements held by the organization (check all that apply), 2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year, 3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year, 4 Number of states where property subject to conservation easement is located, 5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?, 6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year, 7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year, 8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?, 9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

Table with 2 columns: Revenue, Assets. Rows include: 1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items. 1b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items: (i) Revenue included on Form 990, Part VIII, line 1. (ii) Assets included in Form 990, Part X. 2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items: a Revenue included on Form 990, Part VIII, line 1. b Assets included in Form 990, Part X.

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule D (Form 990) 2017

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)**

- 3** Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):
- a**  Public exhibition
  - b**  Scholarly research
  - c**  Preservation for future generations
  - d**  Loan or exchange programs
  - e**  Other \_\_\_\_\_
- 4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5** During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? . . . . .  **Yes**  **No**

**Part IV Escrow and Custodial Arrangements.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a** Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? . . . . .  **Yes**  **No**
- b** If "Yes," explain the arrangement in Part XIII and complete the following table:
- |  | Amount    |
|--|-----------|
| <b>c</b> Beginning balance . . . . .             | <b>1c</b> |
| <b>d</b> Additions during the year . . . . .     | <b>1d</b> |
| <b>e</b> Distributions during the year . . . . . | <b>1e</b> |
| <b>f</b> Ending balance . . . . .                | <b>1f</b> |
- 2a** Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  **Yes**  **No**
- b** If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII . . . . .

**Part V Endowment Funds.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
<b>1a</b> Beginning of year balance . . . . .					
<b>b</b> Contributions . . . . .					
<b>c</b> Net investment earnings, gains, and losses . . . . .					
<b>d</b> Grants or scholarships . . . . .					
<b>e</b> Other expenditures for facilities and programs . . . . .					
<b>f</b> Administrative expenses . . . . .					
<b>g</b> End of year balance . . . . .					

**2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

- a** Board designated or quasi-endowment ▶ \_\_\_\_\_ %
- b** Permanent endowment ▶ \_\_\_\_\_ %
- c** Temporarily restricted endowment ▶ \_\_\_\_\_ %

The percentages on lines 2a, 2b, and 2c should equal 100%.

**3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

- (i)** unrelated organizations . . . . .
- (ii)** related organizations . . . . .

	Yes	No
<b>3a(i)</b>		
<b>3a(ii)</b>		
<b>b</b>		

**b** If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? . . . . .

**4** Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
<b>1a</b> Land . . . . .				
<b>b</b> Buildings . . . . .				
<b>c</b> Leasehold improvements . . . . .		59,350.	30,281.	29,069.
<b>d</b> Equipment . . . . .		75,412.	58,962.	16,450.
<b>e</b> Other . . . . .				
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) . . . . .				45,519.

**Part VII Investments - Other Securities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives . . . . .		
(2) Closely-held equity interests . . . . .		
(3) Other _____		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

**Part VIII Investments - Program Related.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

**Part IX Other Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.) . . . . . ▶	

**Part X Other Liabilities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value	
(1) Federal income taxes		
(2) CONTRACTED SERVICE FEE PAYABLE	20,928.	
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶		

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII



**Part XIII** Supplemental Information (continued)

SCHEDULE D, PART X, LINE 2:

THE AUDITED FINANCIAL STATEMENTS DO NOT REFERENCE ANY UNCERTAIN INCOME  
TAX POSITIONS.

SCHEDULE D, PART XI, LINE 4B

DISCRETIONARY SUPPORT: \$35,000

SCHEDULE D, PART XII, LINE 4B

DISCRETIONARY SUPPORT: \$35,000

**SCHEDULE E  
(Form 990 or 990-EZ)**

**Schools**

OMB No. 1545-0047

**2017**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.**

▶ **Attach to Form 990 or Form 990-EZ.**

▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.**

Name of the organization  
GREENSBORO ACADEMY, INC.

Employer identification number  
56-2108613

**Part I**

	YES	NO
<b>1</b> Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body? . . . . .	X	
<b>2</b> Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships? . . . . .	X	
<b>3</b> Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe. If "No," please explain. If you need more space, use Part II . . . . .	X	
SEE SUPPLEMENTAL PAGE		
<b>4</b> Does the organization maintain the following?		
<b>a</b> Records indicating the racial composition of the student body, faculty, and administrative staff? . . . . .	X	
<b>b</b> Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis? . . . . .	X	
<b>c</b> Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships? . . . . .	X	
<b>d</b> Copies of all material used by the organization or on its behalf to solicit contributions? . . . . .	X	
If you answered "No" to any of the above, please explain. If you need more space, use Part II.		
<b>5</b> Does the organization discriminate by race in any way with respect to:		
<b>a</b> Students' rights or privileges? . . . . .		X
<b>b</b> Admissions policies? . . . . .		X
<b>c</b> Employment of faculty or administrative staff? . . . . .		X
<b>d</b> Scholarships or other financial assistance? . . . . .		X
<b>e</b> Educational policies? . . . . .		X
<b>f</b> Use of facilities? . . . . .		X
<b>g</b> Athletic programs? . . . . .		X
<b>h</b> Other extracurricular activities? . . . . .		X
If you answered "Yes" to any of the above, please explain. If you need more space, use Part II.		
<b>6a</b> Does the organization receive any financial aid or assistance from a governmental agency? . . . . .	X	
<b>b</b> Has the organization's right to such aid ever been revoked or suspended? . . . . .		X
If you answered "Yes" on either line 6a or line 6b, explain on Part II.		
<b>7</b> Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If "No," explain on Part II . . . . .	X	

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or Form 990-EZ.

Schedule E (Form 990 or 990-EZ) 2017

**Part II** **Supplemental Information.** Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable. Also provide any other additional information (see instructions).

SCHEDULE E, PART I, LINE 3:

THE ACADEMY'S RACIALLY NONDISCRIMINATORY POLICY IS DISCLOSED ON ALL STUDENT APPLICATIONS AND PUBLISHED WITH OPEN ENROLLMENT ADVERTISEMENTS IN LOCAL NEWSPAPERS. THE NOTICE OF ITS RACIALLY NONDISCRIMINATORY POLICY IS PUBLISHED ANNUALLY DURING THE PERIOD PRIOR TO THE SCHOOLS SOLICITATION IN LOCAL NEWSPAPERS WHICH ARE AVAILABLE FOR CIRCULATION TO ALL SEGMENTS OF THE COMMUNITY. THE PARTICULARS AS TO COLUMN SIZE, PRINT AND TYPE SPECIFIED BY THE IRS ARE MET OR EXCEEDED.

SCHEDULE E, PART I, LINE 6 - EXPLANATION OF GOVERNMENT FINANCIAL AID:

THE SCHOOL RECEIVES SUPPORT GRANTS FROM FEDERAL, STATE AND LOCAL AGENCIES.

**SCHEDULE O**  
**(Form 990 or 990-EZ)**Department of the Treasury  
Internal Revenue Service

Name of the organization

GREENSBORO ACADEMY, INC.

**Supplemental Information to Form 990 or 990-EZ**Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2017****Open to Public  
Inspection**

Employer identification number

56-2108613

FORM 990, PART VI, LINE 3:

THE BOARD OF DIRECTORS OF THE ACADEMY HAS ENTERED INTO A MANAGEMENT AGREEMENT ("THE AGREEMENT") WITH NATIONAL HERITAGE ACADEMIES, INC. ("NHA") FOR THE PROVISION OF ALL EDUCATIONAL, MANAGEMENT AND BUSINESS SERVICES RELATED TO THE OPERATION OF THE ACADEMY. THE AGREEMENT WAS SUBMITTED AND APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION AS PART OF THE CHARTERING PROCESS. PURSUANT TO THE TERMS OF THE AGREEMENT, NHA RECEIVES ALL REVENUE ALLOCATED TO THE ACADEMY AS ITS MANAGEMENT FEE, FROM WHICH IT PROVIDES ITS COMPREHENSIVE EDUCATIONAL MANAGEMENT SERVICES AS SPECIFIED IN THE AGREEMENT AND REQUIRED UNDER THE ACADEMY'S CHARTER (I.E., ALL OF THE OPERATING COSTS OF THE ACADEMY IDENTIFIED IN THE BUDGET APPROVED BY THE ACADEMY'S BOARD). THE FUNCTIONAL EXPENSES REPORTED IN PART IX ARE THE EXPENSES PAID FROM THE FUNDS REMITTED UNDER THE NHA AGREEMENT. IN THE EVENT EXPENSES EXCEED REVENUES, NHA COVERS THE SHORTFALL WITH AN IN-KIND CONTRIBUTION. THIS AGREEMENT HAS BEEN APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION DURING THE ACADEMY'S CHARTER PROCESS AS WELL AS THE INTERNAL REVENUE SERVICE DURING THE ACADEMY'S EXEMPTION APPLICATION PROCESS.

FORM 990, PART VI, LINE 11B:

A DRAFT COPY OF THE FORM 990 WAS PROVIDED TO THE BOARD OF DIRECTORS IN A PACKAGE OF MATERIALS FOR REVIEW AND BOARD APPROVAL WAS OBTAINED PRIOR TO FINALIZATION.

Name of the organization GREENSBORO ACADEMY, INC.	Employer identification number 56-2108613
--	--

FORM 990, PART VI, LINE 12C:

THE ACADEMY'S BYLAWS REQUIRE THAT ANY DIRECTOR, OFFICER, KEY EMPLOYEE OR COMMITTEE MEMBER WHO HAS A CONFLICT OF INTEREST MUST PROMPTLY NOTIFY THE BOARD OF THE CONFLICT AND THE CONFLICT WILL BE DULY NOTED IN THE BOARD OF DIRECTOR MEETING MINUTES. THE PERSON WITH THE CONFLICT WILL BE EXCLUDED FROM FUTURE DECISION MAKING ON THIS ISSUE. THE BOARD MAY TAKE FORMAL, CORRECTIVE AND DISCIPLINARY ACTIONS IF PROPER DISCLOSURE OF CONFLICTS OF INTEREST ARE NOT MADE.

FORM 990, PART VI, LINE 19:

DOCUMENTS APPROVED BY THE BOARD OF DIRECTORS, INCLUDING THE ACADEMY'S AUDITED FINANCIAL STATEMENTS, ARE AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART IX

THE ACADEMY'S FUNCTIONAL EXPENSES CONSISTS PRIMARILY OF A MANAGEMENT FEE TO NATIONAL HERITAGE ACADEMIES (NHA) FOR THE COMPREHENSIVE EDUCATIONAL MANAGEMENT SERVICES PROVIDED, IN LINE WITH THE MANAGEMENT AGREEMENT APPROVED AS PART OF THE CHARTERING PROCESS. THE FUNCTIONAL EXPENSES REPORTED IN PART IX ARE THE EXPENSES INCURRED BY NHA ON BEHALF OF THE SCHOOL AND PAID USING THE FUNDS REMITTED BY THE ACADEMY UNDER MANAGEMENT FEE. UNDER THE NHA MANAGEMENT AGREEMENT, NHA PROVIDES THE SCHOOL WITH ALL PERSONNEL REQUIRED (I.E. TEACHERS, SPECIALIZED AIDE, PRINCIPALS, OFFICE STAFF, ETC). THE SALARIES AND WAGES AND RELATED PAYROLL EXPENSES REPORTED IN THE STATEMENT OF FUNCTIONAL EXPENSES IN PART IX REFER TO THE COMPENSATION EXPENSES OF THESE NHA EMPLOYEES WORKING AT THE ACADEMY. LIKEWISE, ALL EXPENSES REPORTED IN PART IX ARE EXPENSES INCURRED IN THE

Name of the organization GREENSBORO ACADEMY, INC.	Employer identification number 56-2108613
--	--

OPERATION OF THE ACADEMY BY NHA.

ATTACHMENT 1

FORM 990, PART III, LINE 1 - ORGANIZATION'S MISSION

TO OPERATE A PUBLIC SCHOOL ACADEMY AND TO PROVIDE EDUCATION TO CHILDREN IN GRADES KINDERGARTEN THROUGH EIGHTH GRADE BASED ON RIGOROUS TEACHING METHODS, PARENTAL INVOLVEMENT, STUDENT RESPONSIBILITY, AND BASIC MORAL VALUES. ENROLLMENT IS OPEN TO ALL APPROPRIATELY AGED CHILDREN WITHOUT REGARD TO GENDER, ETHNIC BACKGROUND, DISABILITY, AND/OR RELIGIOUS AFFILIATION.

ATTACHMENT 2

990, PART VII- COMPENSATION OF THE FIVE HIGHEST PAID IND. CONTRACTORS

<u>NAME AND ADDRESS</u>	<u>DESCRIPTION OF SERVICES</u>	<u>COMPENSATION</u>
NATIONAL HERITAGE ACADEMIES, INC. 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS, MI 49512	MANAGEMENT SERVICES	5,432,616.

Form **990**

# Return of Organization Exempt From Income Tax

OMB No. 1545-0047

**2018**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

**A** For the 2018 calendar year, or tax year beginning 07/01, 2018, and ending 06/30, 2019

<b>B</b> Check if applicable:  <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization GREENSBORO ACADEMY, INC. Doing business as Number and street (or P.O. box if mail is not delivered to street address) Room/suite 4049 BATTLEGROUNDAVE City or town, state or province, country, and ZIP or foreign postal code GREENSBORO, NC 27410-8410				<b>D</b> Employer identification number 56-2108613	
	<b>F</b> Name and address of principal officer: ZACH SCHWARZ 4049 BATTLEGROUNDAVE, GREENSBORO, NC 27410-8410				<b>E</b> Telephone number (616) 222-1700	
	<b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c)( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527				<b>G</b> Gross receipts \$ 6,719,359.	
	<b>J</b> Website: WWW.NHASCHOOLS.COM				<b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. (see instructions)	
<b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶				<b>L</b> Year of formation: 1998 <b>M</b> State of legal domicile: NC		

**Part I Summary**

<b>Activities &amp; Governance</b>	1	Briefly describe the organization's mission or most significant activities: TO OPERATE A PUBLIC SCHOOL ACADEMY WHICH PROVIDES EDUCATION BASED ON RIGOROUS TEACHING METHODS, PARENTAL INVOLVEMENT, STUDENT RESPONSIBILITY, AND BASIC MORAL VALUES.		
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3	Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	3.
	4	Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	3.
	5	Total number of individuals employed in calendar year 2018 (Part V, line 2a)	<b>5</b>	0.
	6	Total number of volunteers (estimate if necessary)	<b>6</b>	244.
	7a	Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	0.
	b Net unrelated business taxable income from Form 990-T, line 38	<b>7b</b>		
<b>Revenue</b>	8	Contributions and grants (Part VIII, line 1h)	<b>Prior Year</b>	<b>Current Year</b>
	9	Program service revenue (Part VIII, line 2g)	6,234,201.	6,543,665.
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	141,175.	140,694.
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	0.	0.
	12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	35,000.	35,000.
			6,410,376.	6,719,359.
<b>Expenses</b>	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.	0.
	14	Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	2,888,062.	2,914,976.
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶ 0.		
	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	3,530,660.	3,816,502.
18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	6,418,722.	6,731,478.	
19	Revenue less expenses. Subtract line 18 from line 12	-8,346.	-12,119.	
<b>Net Assets or Fund Balances</b>	20	Total assets (Part X, line 16)	<b>Beginning of Current Year</b>	<b>End of Year</b>
	21	Total liabilities (Part X, line 26)	138,450.	207,473.
	22	Net assets or fund balances. Subtract line 21 from line 20	50,755.	131,897.
		87,695.	75,576.	

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer ZACH SCHWARZ Type or print name and title PRESIDENT	Date
	Print/Type preparer's name JACOB COOK Firm's name ▶ BDO USA, LLP Firm's address ▶ 200 OTTAWA AVE NW STE 300 GRAND RAPIDS, MI 49503	Preparer's signature  Date 03/03/2020 Check <input type="checkbox"/> if self-employed PTIN P01240455 Firm's EIN ▶ 13-5381590 Phone no. 616-774-7000

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

For Paperwork Reduction Act Notice, see the separate instructions. Form **990** (2018)

Form **8868**

(Rev. January 2019)

Department of the Treasury  
Internal Revenue Service

# Application for Automatic Extension of Time To File an Exempt Organization Return

▶ **File a separate application for each return.**  
▶ **Go to [www.irs.gov/Form8868](http://www.irs.gov/Form8868) for the latest information.**

OMB No. 1545-1709

**Electronic filing (e-file).** You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits](http://www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits).

**Automatic 6-Month Extension of Time.** Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

	Enter filer's identifying number, see instructions	
Type or print  File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions.  GREENSBORO ACADEMY, INC.	Employer identification number (EIN) or  56-2108613
	Number, street, and room or suite no. If a P.O. box, see instructions. 4049 BATTLEGROUND AVE	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. GREENSBORO, NC 27410-8410	

Enter the Return Code for the return that this application is for (file a separate application for each return) . . . . . 01

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

COREY BALKON

• The books are in the care of ▶ 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS MI 49512

Telephone No. ▶ 616 222-1700 Fax No. ▶ 616 831-6311

- If the organization does not have an office or place of business in the United States, check this box . . . . . ▶
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ . If this is for the whole group, check this box . . . . . ▶  . If it is for part of the group, check this box . . . . . ▶  and attach a list with the names and EINs of all members the extension is for.

**1** I request an automatic 6-month extension of time until 05/15, 2020, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- ▶  calendar year 20 \_\_\_\_ or
- ▶  tax year beginning 07/01, 2018, and ending 06/30, 2019.

**2** If the tax year entered in line 1 is for less than 12 months, check reason:  Initial return  Final return  
 Change in accounting period

<b>3a</b> If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$ 0.
<b>b</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$ 0.
<b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$ 0.

**Caution:** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

**For Privacy Act and Paperwork Reduction Act Notice, see instructions.**

Form **8868** (Rev. 1-2019)

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III [X]

1 Briefly describe the organization's mission:

ATTACHMENT 1

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No

[ ] Yes [X] No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [ ] Yes [X] No

[ ] Yes [X] No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ 5,042,027. including grants of \$ ) (Revenue \$ 140,634. )

OPERATED AN EDUCATIONAL INSTITUTION ORGANIZED AS A PUBLIC SCHOOL ACADEMY. THE ACADEMY PROVIDES EDUCATION, AT NO COST TO THE PARENT, TO STUDENTS IN KINDERGARTEN THROUGH EIGHTH GRADE. THE ACADEMY OPERATES UNDER A CHARTER APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION.

4b (Code: ) (Expenses \$ 6,690. including grants of \$ ) (Revenue \$ 60. )

OPERATED A SCHOOL FOOD SERVICE PROGRAM AT THE PUBLIC SCHOOL ACADEMY DESCRIBED ABOVE. THE ACADEMY OFFERS FREE OR REDUCED LUNCH FOR FAMILIES THAT QUALIFY.

4c (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4d Other program services (Describe in Schedule O.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses 5,048,717.

**Part IV Checklist of Required Schedules**

	Yes	No
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A.</i> . . . . .	X	
<b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> (see instructions)? . . . . .	X	
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I.</i> . . . . .		X
<b>4</b> <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II.</i> . . . . .		X
<b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III.</i> . . . . .		X
<b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I.</i> . . . . .		X
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II.</i> . . . . .		X
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III.</i> . . . . .		X
<b>9</b> Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV.</i> . . . . .		X
<b>10</b> Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V.</i> . . . . .		X
<b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
<b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI.</i> . . . . .	X	
<b>b</b> Did the organization report an amount for investments-other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII.</i> . . . . .		X
<b>c</b> Did the organization report an amount for investments-program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII.</i> . . . . .		X
<b>d</b> Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX.</i> . . . . .		X
<b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X.</i> . . . . .	X	
<b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X.</i> . . . . .		X
<b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII.</i> . . . . .	X	
<b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional.</i> . . . . .		X
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E.</i> . . . . .	X	
<b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States?. . . . .		X
<b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV.</i> . . . . .		X
<b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV.</i> . . . . .		X
<b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV.</i> . . . . .		X
<b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I</i> (see instructions). . . . .		X
<b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II.</i> . . . . .		X
<b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III.</i> . . . . .		X
<b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H.</i> . . . . .		X
<b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? . . . . .		
<b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II.</i> . . . . .		X

Part IV Checklist of Required Schedules (continued)

Table with 3 columns: Question number, Question text, Yes, No. Rows 22-38 covering various IRS schedule requirements.

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V. [ ]

Table with 3 columns: Question number, Question text, Yes, No. Rows 1a-1c regarding Form 1096, W-2G forms, and backup withholding.

**Part V** Statements Regarding Other IRS Filings and Tax Compliance (continued)

		Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return. <span style="float:right">2a</span> 0.		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).	2b	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	X
b	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O	3b	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a	X
b	If "Yes," enter the name of the foreign country: See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a	X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b	X
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c	
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a	X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b	
7	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c	X
d	If "Yes," indicate the number of Forms 8282 filed during the year <span style="float:right">7d</span>		
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e	X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f	X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	
8	<b>Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8	
9	<b>Sponsoring organizations maintaining donor advised funds.</b>		
a	Did the sponsoring organization make any taxable distributions under section 4966?	9a	
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b	
10	<b>Section 501(c)(7) organizations.</b> Enter:		
a	Initiation fees and capital contributions included on Part VIII, line 12 <span style="float:right">10a</span>		
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities <span style="float:right">10b</span>		
11	<b>Section 501(c)(12) organizations.</b> Enter:		
a	Gross income from members or shareholders <span style="float:right">11a</span>		
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.) <span style="float:right">11b</span>		
12a	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?	12a	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year <span style="float:right">12b</span>		
13	<b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
a	Is the organization licensed to issue qualified health plans in more than one state? <b>Note.</b> See the instructions for additional information the organization must report on Schedule O.	13a	
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans <span style="float:right">13b</span>		
c	Enter the amount of reserves on hand <span style="float:right">13c</span>		
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a	X
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	14b	
15	Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see instructions and file Form 4720, Schedule N.	15	X
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	16	X

**Part VI Governance, Management, and Disclosure** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

**Section A. Governing Body and Management**

	Yes	No
<b>1a</b> Enter the number of voting members of the governing body at the end of the tax year . . . . . If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.		
<b>1b</b> Enter the number of voting members included in line 1a, above, who are independent . . . . .		
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? . . . . .		X
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person? . .	X	
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? . . . . .		X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets? . . . .		X
<b>6</b> Did the organization have members or stockholders? . . . . .		X
<b>7a</b> Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? . . . . .		X
<b>7b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? . . . . .		X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b> The governing body? . . . . .	X	
<b>b</b> Each committee with authority to act on behalf of the governing body? . . . . .	X	
<b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? <i>If "Yes," provide the names and addresses in Schedule O . . . . .</i>		X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
<b>10a</b> Did the organization have local chapters, branches, or affiliates? . . . . .		X
<b>10b</b> If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? . .		
<b>11a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? .	X	
<b>11b</b> Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
<b>12a</b> Did the organization have a written conflict of interest policy? <i>If "No," go to line 13 . . . . .</i>	X	
<b>12b</b> Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? . . . . .	X	
<b>12c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? <i>If "Yes," describe in Schedule O how this was done . . . . .</i>	X	
<b>13</b> Did the organization have a written whistleblower policy? . . . . .		X
<b>14</b> Did the organization have a written document retention and destruction policy? . . . . .	X	
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>15a</b> The organization's CEO, Executive Director, or top management official . . . . .		X
<b>15b</b> Other officers or key employees of the organization . . . . .		X
If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).		
<b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? . . . . .		X
<b>16b</b> If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? . . . . .		

**Section C. Disclosure**

- 17** List the states with which a copy of this Form 990 is required to be filed ► NONE
- 18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
 Own website     Another's website     Upon request     Other (explain in Schedule O)
- 19** Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records ►  
 COREY BALKON 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS, MI 49512 (616) 222-1700

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) ZACH SCHWARZ PRESIDENT	1.00 0.	X		X			0.	0.	0.	
(2) ROBERT GRAY VICE PRESIDENT	1.00 0.	X		X			0.	0.	0.	
(3) BRIAN CLARIDA TREASURER	1.00 0.	X		X			0.	0.	0.	
(4)										
(5)										
(6)										
(7)										
(8)										
(9)										
(10)										
(11)										
(12)										
(13)										
(14)										



**Part VIII Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1a</b> Federated campaigns . . . . .	<b>1a</b>					
	<b>b</b> Membership dues . . . . .	<b>1b</b>					
	<b>c</b> Fundraising events . . . . .	<b>1c</b>					
	<b>d</b> Related organizations . . . . .	<b>1d</b>					
	<b>e</b> Government grants (contributions) . . . . .	<b>1e</b>	6,543,665.				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above . . . . .	<b>1f</b>					
	<b>g</b> Noncash contributions included in lines 1a-1f: \$ . . . . .						
	<b>h Total.</b> Add lines 1a-1f . . . . . ▶			6,543,665.			
	<b>Program Service Revenue</b>			<b>Business Code</b>			
<b>2a</b> FOOD SERVICE PROGRAM			611600	60.	60.		
<b>b</b> MISCELLANEOUS ACTIVITY FEES			900099	140,634.	140,634.		
<b>c</b>							
<b>d</b>							
<b>e</b>							
<b>f</b> All other program service revenue . . . . .							
<b>g Total.</b> Add lines 2a-2f . . . . . ▶			140,694.				
<b>Other Revenue</b>	<b>3</b> Investment income (including dividends, interest, and other similar amounts). . . . . ▶			0.			
	<b>4</b> Income from investment of tax-exempt bond proceeds . . . . . ▶			0.			
	<b>5</b> Royalties . . . . . ▶			0.			
		(i) Real	(ii) Personal				
	<b>6a</b> Gross rents . . . . .						
	<b>b</b> Less: rental expenses . . . . .						
	<b>c</b> Rental income or (loss) . . . . .						
	<b>d</b> Net rental income or (loss) . . . . . ▶			0.			
	<b>7a</b> Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
	<b>b</b> Less: cost or other basis and sales expenses . . . . .						
	<b>c</b> Gain or (loss) . . . . .						
	<b>d</b> Net gain or (loss) . . . . . ▶			0.			
	<b>8a</b> Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18 . . . . . <b>a</b>			0.			
	<b>b</b> Less: direct expenses . . . . . <b>b</b>			0.			
	<b>c</b> Net income or (loss) from fundraising events . . . . . ▶			0.			
<b>9a</b> Gross income from gaming activities. See Part IV, line 19 . . . . . <b>a</b>			0.				
<b>b</b> Less: direct expenses . . . . . <b>b</b>			0.				
<b>c</b> Net income or (loss) from gaming activities . . . . . ▶			0.				
<b>10a</b> Gross sales of inventory, less returns and allowances . . . . . <b>a</b>			0.				
<b>b</b> Less: cost of goods sold . . . . . <b>b</b>			0.				
<b>c</b> Net income or (loss) from sales of inventory . . . . . ▶			0.				
<b>Miscellaneous Revenue</b>		<b>Business Code</b>					
<b>11a</b> DISCRETIONARY SUPPORT		611710	35,000.			35,000.	
<b>b</b>							
<b>c</b>							
<b>d</b> All other revenue . . . . .							
<b>e Total.</b> Add lines 11a-11d . . . . . ▶			35,000.				
<b>12 Total revenue.</b> See instructions. . . . . ▶			6,719,359.	140,694.		35,000.	

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX  X

<b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b>	<b>(A)</b> Total expenses	<b>(B)</b> Program service expenses	<b>(C)</b> Management and general expenses	<b>(D)</b> Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 . . . . .	0.			
2 Grants and other assistance to domestic individuals. See Part IV, line 22 . . . . .	0.			
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 . . . . .	0.			
4 Benefits paid to or for members . . . . .	0.			
5 Compensation of current officers, directors, trustees, and key employees . . . . .	0.			
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .	0.			
7 Other salaries and wages . . . . .	2,222,135.	2,222,135.		
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	54,191.	54,191.		
9 Other employee benefits . . . . .	472,960.	472,960.		
10 Payroll taxes . . . . .	165,690.	165,690.		
11 Fees for services (non-employees):				
a Management . . . . .	0.			
b Legal . . . . .	0.			
c Accounting . . . . .	185,059.	9,312.	175,747.	
d Lobbying . . . . .	0.			
e Professional fundraising services. See Part IV, line 17.	0.			
f Investment management fees . . . . .	0.			
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.) . . . . .	304,273.	304,273.		
12 Advertising and promotion . . . . .	72,988.	220.	72,768.	
13 Office expenses . . . . .	244,938.	244,938.		
14 Information technology. . . . .	255,694.	7,308.	248,386.	
15 Royalties. . . . .	0.			
16 Occupancy . . . . .	1,386,214.	1,352,786.	33,428.	
17 Travel . . . . .	3,517.	3,517.		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	0.			
19 Conferences, conventions, and meetings . . . . .	56,919.	56,919.		
20 Interest . . . . .	0.			
21 Payments to affiliates. . . . .	0.			
22 Depreciation, depletion, and amortization . . . . .	6,885.	6,885.		
23 Insurance . . . . .	22,317.	22,317.		
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a INSTRUCTIONAL SUPPORT	359,634.		359,634.	
b HUMAN RESOURCES	318,083.		318,083.	
c ACADEMIC & GENERAL SUPPORT	206,559.		206,559.	
d DISCRETIONARY EXPENSES	110,380.		110,380.	
e All other expenses _____	283,042.	125,266.	157,776.	
<b>25 Total functional expenses.</b> Add lines 1 through 24e	<b>6,731,478.</b>	<b>5,048,717.</b>	<b>1,682,761.</b>	
<b>26 Joint costs.</b> Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720) . . . . .	0.			

**Part X Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part X

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing	78,968.	<b>1</b>	85,744.
	<b>2</b> Savings and temporary cash investments	0.	<b>2</b>	0.
	<b>3</b> Pledges and grants receivable, net	13,963.	<b>3</b>	82,166.
	<b>4</b> Accounts receivable, net	0.	<b>4</b>	0.
	<b>5</b> Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L	0.	<b>5</b>	0.
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L	0.	<b>6</b>	0.
	<b>7</b> Notes and loans receivable, net	0.	<b>7</b>	0.
	<b>8</b> Inventories for sale or use	0.	<b>8</b>	0.
	<b>9</b> Prepaid expenses and deferred charges	0.	<b>9</b>	0.
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	<b>10a</b> 134,762.		
	<b>b</b> Less: accumulated depreciation	<b>10b</b> 95,199.	45,519.	<b>10c</b> 39,563.
	<b>11</b> Investments - publicly traded securities	0.	<b>11</b>	0.
	<b>12</b> Investments - other securities. See Part IV, line 11	0.	<b>12</b>	0.
	<b>13</b> Investments - program-related. See Part IV, line 11	0.	<b>13</b>	0.
	<b>14</b> Intangible assets	0.	<b>14</b>	0.
	<b>15</b> Other assets. See Part IV, line 11	0.	<b>15</b>	0.
<b>16 Total assets.</b> Add lines 1 through 15 (must equal line 34)		138,450.	<b>16</b> 207,473.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses	0.	<b>17</b>	0.
	<b>18</b> Grants payable	0.	<b>18</b>	0.
	<b>19</b> Deferred revenue	29,827.	<b>19</b>	47,681.
	<b>20</b> Tax-exempt bond liabilities	0.	<b>20</b>	0.
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D	0.	<b>21</b>	0.
	<b>22</b> Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L	0.	<b>22</b>	0.
	<b>23</b> Secured mortgages and notes payable to unrelated third parties	0.	<b>23</b>	0.
	<b>24</b> Unsecured notes and loans payable to unrelated third parties	0.	<b>24</b>	0.
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	20,928.	<b>25</b>	84,216.
	<b>26 Total liabilities.</b> Add lines 17 through 25		50,755.	<b>26</b> 131,897.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b>			
	<b>27</b> Unrestricted net assets	87,695.	<b>27</b>	75,576.
	<b>28</b> Temporarily restricted net assets	0.	<b>28</b>	0.
	<b>29</b> Permanently restricted net assets	0.	<b>29</b>	0.
	<b>Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.</b>			
	<b>30</b> Capital stock or trust principal, or current funds		<b>30</b>	
	<b>31</b> Paid-in or capital surplus, or land, building, or equipment fund		<b>31</b>	
	<b>32</b> Retained earnings, endowment, accumulated income, or other funds		<b>32</b>	
	<b>33</b> Total net assets or fund balances	87,695.	<b>33</b>	75,576.
	<b>34</b> Total liabilities and net assets/fund balances	138,450.	<b>34</b>	207,473.

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI.

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	6,719,359.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	6,731,478.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	-12,119.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	<b>4</b>	87,695.
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	0.
<b>6</b>	Donated services and use of facilities	<b>6</b>	0.
<b>7</b>	Investment expenses	<b>7</b>	0.
<b>8</b>	Prior period adjustments	<b>8</b>	0.
<b>9</b>	Other changes in net assets or fund balances (explain in Schedule O)	<b>9</b>	0.
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	<b>10</b>	75,576.

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII

		Yes	No
<b>1</b>	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.		
<b>2a</b>	Were the organization's financial statements compiled or reviewed by an independent accountant? . . . . . If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		X
<b>b</b>	Were the organization's financial statements audited by an independent accountant? . . . . . If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	X	
<b>c</b>	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.	X	
<b>3a</b>	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? . . . . .		X
<b>b</b>	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.		

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

**Public Charity Status and Public Support**

OMB No. 1545-0047

**2018**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Name of the organization

GREENSBORO ACADEMY, INC.

Employer identification number

56-2108613

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2  A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990 or 990-EZ).)
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8  A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9  An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10  An organization that normally receives: (1) more than 33 1/3 % of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3 % of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 11  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**.  
Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
  - a  **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b  **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c  **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d  **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e  Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations . . . . .

g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
<b>Total</b>						

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule A (Form 990 or 990-EZ) 2018

JSA  
8E1210 1.000

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)
(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Table with 7 columns: (a) 2014, (b) 2015, (c) 2016, (d) 2017, (e) 2018, (f) Total. Rows include: 1 Gifts, grants, contributions, and membership fees received; 2 Tax revenues levied for the organization's benefit; 3 The value of services or facilities furnished by a governmental unit; 4 Total. Add lines 1 through 3; 5 The portion of total contributions by each person; 6 Public support. Subtract line 5 from line 4.

Section B. Total Support

Table with 7 columns: (a) 2014, (b) 2015, (c) 2016, (d) 2017, (e) 2018, (f) Total. Rows include: 7 Amounts from line 4; 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources; 9 Net income from unrelated business activities; 10 Other income. Do not include gain or loss from the sale of capital assets; 11 Total support. Add lines 7 through 10; 12 Gross receipts from related activities, etc. (see instructions); 13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here.

Section C. Computation of Public Support Percentage

Table with 3 columns: Line number, Description, and Percentage. Rows include: 14 Public support percentage for 2018; 15 Public support percentage from 2017 Schedule A, Part II, line 14; 16a 33 1/3% support test - 2018; 16b 33 1/3% support test - 2017; 17a 10%-facts-and-circumstances test - 2018; 17b 10%-facts-and-circumstances test - 2017; 18 Private foundation.

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**  
 (Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II.  
 If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose . . . . .						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 . . . . .						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .						
<b>6 Total.</b> Add lines 1 through 5 . . . . .						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons . . . . .						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year . . . . .						
<b>c</b> Add lines 7a and 7b. . . . .						
<b>8 Public support.</b> (Subtract line 7c from line 6.) . . . . .						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
<b>9</b> Amounts from line 6. . . . .						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources . . . . .						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 . . . . .						
<b>c</b> Add lines 10a and 10b . . . . .						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on. . . . .						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . . . .						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.) . . . . .						

**14 First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** . . . . .

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2018 (line 8, column (f), divided by line 13, column (f)) . . . . .	<b>15</b>	%
<b>16</b> Public support percentage from 2017 Schedule A, Part III, line 15 . . . . .	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for <b>2018</b> (line 10c, column (f), divided by line 13, column (f)). . . . .	<b>17</b>	%
<b>18</b> Investment income percentage from <b>2017</b> Schedule A, Part III, line 17 . . . . .	<b>18</b>	%

**19a 33 1/3% support tests - 2018.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization .

**b 33 1/3% support tests - 2017.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ►

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ►

**Part IV Supporting Organizations**

(Complete only if you checked a box in line 12 on Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i>		
<b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
<b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.</i>		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
<b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
<b>b Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
<b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
<b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
<b>b</b> Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>c</b> Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>10a</b> Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer 10b below.</i>		
<b>b</b> Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

**Part IV Supporting Organizations (continued)**

	Yes	No
<b>11</b> Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b> A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?	<b>11a</b>	
<b>b</b> A family member of a person described in (a) above?	<b>11b</b>	
<b>c</b> A 35% controlled entity of a person described in (a) or (b) above? <i>If "Yes" to a, b, or c, provide detail in Part VI.</i>	<b>11c</b>	

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i>	<b>1</b>	
<b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.</i>	<b>2</b>	

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i>	<b>1</b>	

**Section D. All Type III Supporting Organizations**

	Yes	No
<b>1</b> Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	<b>1</b>	
<b>2</b> Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>	<b>2</b>	
<b>3</b> By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>	<b>3</b>	

**Section E. Type III Functionally Integrated Supporting Organizations**

<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year ( <i>see instructions</i> ).			
<b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. <i>Complete line 2 below.</i>			
<b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. <i>Complete line 3 below.</i>			
<b>c</b> <input type="checkbox"/> The organization supported a governmental entity. <i>Describe in Part VI how you supported a government entity (see instructions).</i>			
<b>2</b> Activities Test. <i>Answer (a) and (b) below.</i>		Yes	No
<b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>	<b>2a</b>		
<b>b</b> Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>	<b>2b</b>		
<b>3</b> Parent of Supported Organizations. <i>Answer (a) and (b) below.</i>			
<b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>Provide details in Part VI.</i>	<b>3a</b>		
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>	<b>3b</b>		

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- 1**  Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

<b>Section A - Adjusted Net Income</b>		(A) Prior Year	(B) Current Year (optional)
<b>1</b> Net short-term capital gain	<b>1</b>		
<b>2</b> Recoveries of prior-year distributions	<b>2</b>		
<b>3</b> Other gross income (see instructions)	<b>3</b>		
<b>4</b> Add lines 1 through 3.	<b>4</b>		
<b>5</b> Depreciation and depletion	<b>5</b>		
<b>6</b> Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	<b>6</b>		
<b>7</b> Other expenses (see instructions)	<b>7</b>		
<b>8 Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)	<b>8</b>		
<b>Section B - Minimum Asset Amount</b>		(A) Prior Year	(B) Current Year (optional)
<b>1</b> Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):			
<b>a</b> Average monthly value of securities	<b>1a</b>		
<b>b</b> Average monthly cash balances	<b>1b</b>		
<b>c</b> Fair market value of other non-exempt-use assets	<b>1c</b>		
<b>d Total</b> (add lines 1a, 1b, and 1c)	<b>1d</b>		
<b>e Discount</b> claimed for blockage or other factors (explain in detail in <b>Part VI</b> ):			
<b>2</b> Acquisition indebtedness applicable to non-exempt-use assets	<b>2</b>		
<b>3</b> Subtract line 2 from line 1d.	<b>3</b>		
<b>4</b> Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions).	<b>4</b>		
<b>5</b> Net value of non-exempt-use assets (subtract line 4 from line 3)	<b>5</b>		
<b>6</b> Multiply line 5 by .035.	<b>6</b>		
<b>7</b> Recoveries of prior-year distributions	<b>7</b>		
<b>8 Minimum Asset Amount</b> (add line 7 to line 6)	<b>8</b>		
<b>Section C - Distributable Amount</b>			Current Year
<b>1</b> Adjusted net income for prior year (from Section A, line 8, Column A)	<b>1</b>		
<b>2</b> Enter 85% of line 1.	<b>2</b>		
<b>3</b> Minimum asset amount for prior year (from Section B, line 8, Column A)	<b>3</b>		
<b>4</b> Enter greater of line 2 or line 3.	<b>4</b>		
<b>5</b> Income tax imposed in prior year	<b>5</b>		
<b>6 Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	<b>6</b>		
<b>7</b> <input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).			

Schedule A (Form 990 or 990-EZ) 2018

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)**

Section D - Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in Part VI). See instructions.	
7 <b>Total annual distributions.</b> Add lines 1 through 6.	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	
9 Distributable amount for 2018 from Section C, line 6	
10 Line 8 amount divided by line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2018	(iii) Distributable Amount for 2018
1 Distributable amount for 2018 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2018 (reasonable cause required - explain in Part VI). See instructions.			
3 Excess distributions carryover, if any, to 2018			
a From 2013 . . . . .			
b From 2014 . . . . .			
c From 2015 . . . . .			
d From 2016 . . . . .			
e From 2017 . . . . .			
f <b>Total</b> of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2018 distributable amount			
i Carryover from 2013 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2018 from Section D, line 7:                     \$			
a Applied to underdistributions of prior years			
b Applied to 2018 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4.			
5 Remaining underdistributions for years prior to 2018, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.			
6 Remaining underdistributions for 2018. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.			
7 <b>Excess distributions carryover to 2019.</b> Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2014 . . . .			
b Excess from 2015 . . . .			
c Excess from 2016 . . . .			
d Excess from 2017 . . . .			
e Excess from 2018 . . . .			

**Part VI** **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

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**Schedule B**  
 (Form 990, 990-EZ,  
 or 990-PF)  
 Department of the Treasury  
 Internal Revenue Service

**Schedule of Contributors**

OMB No. 1545-0047

**2018**

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**  
 ▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.**

Name of the organization GREENSBORO ACADEMY, INC.	Employer identification number 56-2108613
--	--

**Organization type** (check one):

**Filers of:**

**Section:**

- Form 990 or 990-EZ  501(c)(3 ) (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- 527 political organization
- Form 990-PF  501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year . . . . . ▶ \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization **GREENSBORO ACADEMY, INC.**

Employer identification number  
56-2108613

**Part I** **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		\$ 4,432,518.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2		\$ 1,960,765.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3		\$ 150,382.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization **GREENSBORO ACADEMY, INC.**

**Employer identification number**

56-2108613

**Part II** **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____

Name of organization **GREENSBORO ACADEMY, INC.**

Employer identification number

56-2108613

**Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor.** Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$ \_\_\_\_\_  
 Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____	_____	_____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____	_____	_____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____	_____	_____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____	_____	_____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____	_____
_____	_____

**SCHEDULE D  
(Form 990)**

**Supplemental Financial Statements**

OMB No. 1545-0047

**2018**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Name of the organization

GREENSBORO ACADEMY, INC.

Employer identification number

56-2108613

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year . . . . .		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year) . .		
4 Aggregate value at end of year . . . . .		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? . . . . .		<input type="checkbox"/> Yes <input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? . . . . .		<input type="checkbox"/> Yes <input type="checkbox"/> No

**Part II Conservation Easements.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (e.g., recreation or education)	<input type="checkbox"/> Preservation of a historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements . . . . .	2a
b Total acreage restricted by conservation easements . . . . .	2b
c Number of conservation easements on a certified historic structure included in (a) . . . . .	2c
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register . . . . .	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ \_\_\_\_\_

4 Number of states where property subject to conservation easement is located ▶ \_\_\_\_\_

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? . . . . .  Yes  No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \_\_\_\_\_

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$ \_\_\_\_\_

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? . . . . .  Yes  No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1. . . . . ▶ \$ \_\_\_\_\_

(ii) Assets included in Form 990, Part X. . . . . ▶ \$ \_\_\_\_\_

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:

a Revenue included on Form 990, Part VIII, line 1. . . . . ▶ \$ \_\_\_\_\_

b Assets included in Form 990, Part X. . . . . ▶ \$ \_\_\_\_\_

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule D (Form 990) 2018

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)**

- 3** Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):
- a**  Public exhibition
  - b**  Scholarly research
  - c**  Preservation for future generations
  - d**  Loan or exchange programs
  - e**  Other \_\_\_\_\_
- 4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5** During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? . . . . .  **Yes**  **No**

**Part IV Escrow and Custodial Arrangements.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a** Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? . . . . .  **Yes**  **No**
- b** If "Yes," explain the arrangement in Part XIII and complete the following table:
- |  | Amount    |
|--|-----------|
| <b>c</b> Beginning balance . . . . .             | <b>1c</b> |
| <b>d</b> Additions during the year . . . . .     | <b>1d</b> |
| <b>e</b> Distributions during the year . . . . . | <b>1e</b> |
| <b>f</b> Ending balance . . . . .                | <b>1f</b> |
- 2a** Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  **Yes**  **No**
- b** If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII . . . . .

**Part V Endowment Funds.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
<b>1a</b> Beginning of year balance . . . . .					
<b>b</b> Contributions . . . . .					
<b>c</b> Net investment earnings, gains, and losses . . . . .					
<b>d</b> Grants or scholarships . . . . .					
<b>e</b> Other expenditures for facilities and programs . . . . .					
<b>f</b> Administrative expenses . . . . .					
<b>g</b> End of year balance . . . . .					

- 2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a** Board designated or quasi-endowment ▶ \_\_\_\_\_ %
  - b** Permanent endowment ▶ \_\_\_\_\_ %
  - c** Temporarily restricted endowment ▶ \_\_\_\_\_ %
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- |   | Yes           | No |
|---|---------------|----|
| <b>(i)</b> unrelated organizations . . . . .  | <b>3a(i)</b>  |    |
| <b>(ii)</b> related organizations . . . . .   | <b>3a(ii)</b> |    |
| <b>b</b> If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? . . . . . | <b>3b</b>     |    |
- 4** Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
<b>1a</b> Land . . . . .				
<b>b</b> Buildings . . . . .				
<b>c</b> Leasehold improvements . . . . .		59,350.	31,781.	27,569.
<b>d</b> Equipment . . . . .		75,412.	63,418.	11,994.
<b>e</b> Other . . . . .				
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) . . . . .				39,563.

**Part VII Investments - Other Securities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives . . . . .		
(2) Closely-held equity interests . . . . .		
(3) Other _____		
(A) _____		
(B) _____		
(C) _____		
(D) _____		
(E) _____		
(F) _____		
(G) _____		
(H) _____		
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

**Part VIII Investments - Program Related.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) _____		
(2) _____		
(3) _____		
(4) _____		
(5) _____		
(6) _____		
(7) _____		
(8) _____		
(9) _____		
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

**Part IX Other Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) _____	
(2) _____	
(3) _____	
(4) _____	
(5) _____	
(6) _____	
(7) _____	
(8) _____	
(9) _____	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.) . . . . . ▶	

**Part X Other Liabilities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) CONTRACTED SERVICE FEE PAYABLE	84,216.
(3) _____	
(4) _____	
(5) _____	
(6) _____	
(7) _____	
(8) _____	
(9) _____	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	84,216.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

<b>1</b>	Total revenue, gains, and other support per audited financial statements . . . . .		<b>1</b>	6,684,359.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
<b>a</b>	Net unrealized gains (losses) on investments . . . . .	<b>2a</b>		
<b>b</b>	Donated services and use of facilities . . . . .	<b>2b</b>		
<b>c</b>	Recoveries of prior year grants . . . . .	<b>2c</b>		
<b>d</b>	Other (Describe in Part XIII.) . . . . .	<b>2d</b>		
<b>e</b>	Add lines <b>2a</b> through <b>2d</b> . . . . .		<b>2e</b>	
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b> . . . . .		<b>3</b>	6,684,359.
<b>4</b>	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b . . . . .	<b>4a</b>		
<b>b</b>	Other (Describe in Part XIII.) . . . . .	<b>4b</b>	35,000.	
<b>c</b>	Add lines <b>4a</b> and <b>4b</b> . . . . .		<b>4c</b>	35,000.
<b>5</b>	Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12.) . . . . .		<b>5</b>	6,719,359.

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

<b>1</b>	Total expenses and losses per audited financial statements . . . . .		<b>1</b>	6,696,478.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
<b>a</b>	Donated services and use of facilities . . . . .	<b>2a</b>		
<b>b</b>	Prior year adjustments . . . . .	<b>2b</b>		
<b>c</b>	Other losses . . . . .	<b>2c</b>		
<b>d</b>	Other (Describe in Part XIII.) . . . . .	<b>2d</b>		
<b>e</b>	Add lines <b>2a</b> through <b>2d</b> . . . . .		<b>2e</b>	
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b> . . . . .		<b>3</b>	6,696,478.
<b>4</b>	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b . . . . .	<b>4a</b>		
<b>b</b>	Other (Describe in Part XIII.) . . . . .	<b>4b</b>	35,000.	
<b>c</b>	Add lines <b>4a</b> and <b>4b</b> . . . . .		<b>4c</b>	35,000.
<b>5</b>	Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18.) . . . . .		<b>5</b>	6,731,478.

**Part XIII Supplemental Information.**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

SEE PAGE 5

**Part XIII** Supplemental Information (continued)

SCHEDULE D, PART X, LINE 2:

THE AUDITED FINANCIAL STATEMENTS DO NOT REFERENCE ANY UNCERTAIN INCOME  
TAX POSITIONS.

SCHEDULE D, PART XI, LINE 4B

DISCRETIONARY SUPPORT: \$35,000

SCHEDULE D, PART XII, LINE 4B

DISCRETIONARY SUPPORT: \$35,000

**SCHEDULE E  
(Form 990 or 990-EZ)**

**Schools**

OMB No. 1545-0047

**2018**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.**

▶ **Attach to Form 990 or Form 990-EZ.**

▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.**

Name of the organization  
GREENSBORO ACADEMY, INC.

Employer identification number  
56-2108613

**Part I**

	YES	NO
<b>1</b> Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body? . . . . .	X	
<b>2</b> Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships? . . . . .	X	
<b>3</b> Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe. If "No," please explain. If you need more space, use Part II . . . . .	X	
SEE SUPPLEMENTAL PAGE		
<b>4</b> Does the organization maintain the following?		
<b>a</b> Records indicating the racial composition of the student body, faculty, and administrative staff? . . . . .	X	
<b>b</b> Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis? . . . . .	X	
<b>c</b> Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships? . . . . .	X	
<b>d</b> Copies of all material used by the organization or on its behalf to solicit contributions? . . . . .	X	
If you answered "No" to any of the above, please explain. If you need more space, use Part II.		
<b>5</b> Does the organization discriminate by race in any way with respect to:		
<b>a</b> Students' rights or privileges? . . . . .		X
<b>b</b> Admissions policies? . . . . .		X
<b>c</b> Employment of faculty or administrative staff? . . . . .		X
<b>d</b> Scholarships or other financial assistance? . . . . .		X
<b>e</b> Educational policies? . . . . .		X
<b>f</b> Use of facilities? . . . . .		X
<b>g</b> Athletic programs? . . . . .		X
<b>h</b> Other extracurricular activities? . . . . .		X
If you answered "Yes" to any of the above, please explain. If you need more space, use Part II.		
<b>6a</b> Does the organization receive any financial aid or assistance from a governmental agency? . . . . .	X	
<b>b</b> Has the organization's right to such aid ever been revoked or suspended? . . . . .		X
If you answered "Yes" on either line 6a or line 6b, explain on Part II.		
<b>7</b> Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If "No," explain on Part II . . . . .	X	

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or Form 990-EZ.

Schedule E (Form 990 or 990-EZ) 2018

**Part II** **Supplemental Information.** Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable. Also provide any other additional information (see instructions).

SCHEDULE E, PART I, LINE 3:

THE ACADEMY'S RACIALLY NONDISCRIMINATORY POLICY IS DISCLOSED ON ALL STUDENT APPLICATIONS AND PUBLISHED WITH OPEN ENROLLMENT ADVERTISEMENTS IN LOCAL NEWSPAPERS. THE NOTICE OF ITS RACIALLY NONDISCRIMINATORY POLICY IS PUBLISHED ANNUALLY DURING THE PERIOD PRIOR TO THE SCHOOLS SOLICITATION IN LOCAL NEWSPAPERS WHICH ARE AVAILABLE FOR CIRCULATION TO ALL SEGMENTS OF THE COMMUNITY. THE PARTICULARS AS TO COLUMN SIZE, PRINT AND TYPE SPECIFIED BY THE IRS ARE MET OR EXCEEDED.

SCHEDULE E, PART I, LINE 6 - EXPLANATION OF GOVERNMENT FINANCIAL AID:

THE SCHOOL RECEIVES SUPPORT GRANTS FROM FEDERAL, STATE AND LOCAL AGENCIES.

**SCHEDULE O**  
**(Form 990 or 990-EZ)**Department of the Treasury  
Internal Revenue Service

Name of the organization

GREENSBORO ACADEMY, INC.

**Supplemental Information to Form 990 or 990-EZ**Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2018****Open to Public  
Inspection**

Employer identification number

56-2108613

FORM 990, PART VI, LINE 3:

THE BOARD OF DIRECTORS OF THE ACADEMY HAS ENTERED INTO A MANAGEMENT AGREEMENT ("THE AGREEMENT") WITH NATIONAL HERITAGE ACADEMIES, INC. ("NHA") FOR THE PROVISION OF ALL EDUCATIONAL, MANAGEMENT AND BUSINESS SERVICES RELATED TO THE OPERATION OF THE ACADEMY. THE AGREEMENT WAS SUBMITTED AND APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION AS PART OF THE CHARTERING PROCESS. PURSUANT TO THE TERMS OF THE AGREEMENT, NHA RECEIVES ALL REVENUE ALLOCATED TO THE ACADEMY AS ITS MANAGEMENT FEE, FROM WHICH IT PROVIDES ITS COMPREHENSIVE EDUCATIONAL MANAGEMENT SERVICES AS SPECIFIED IN THE AGREEMENT AND REQUIRED UNDER THE ACADEMY'S CHARTER (I.E., ALL OF THE OPERATING COSTS OF THE ACADEMY IDENTIFIED IN THE BUDGET APPROVED BY THE ACADEMY'S BOARD). THE FUNCTIONAL EXPENSES REPORTED IN PART IX ARE THE EXPENSES PAID FROM THE FUNDS REMITTED UNDER THE NHA AGREEMENT. IN THE EVENT EXPENSES EXCEED REVENUES, NHA COVERS THE SHORTFALL WITH AN IN-KIND CONTRIBUTION. THIS AGREEMENT HAS BEEN APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION DURING THE ACADEMY'S CHARTER PROCESS AS WELL AS THE INTERNAL REVENUE SERVICE DURING THE ACADEMY'S EXEMPTION APPLICATION PROCESS.

FORM 990, PART VI, LINE 11B:

A DRAFT COPY OF THE FORM 990 WAS PROVIDED TO THE BOARD OF DIRECTORS IN A PACKAGE OF MATERIALS FOR REVIEW AND BOARD APPROVAL WAS OBTAINED PRIOR TO FINALIZATION.

Name of the organization GREENSBORO ACADEMY, INC.	Employer identification number 56-2108613
--	--

FORM 990, PART VI, LINE 12C:

THE ACADEMY'S BYLAWS REQUIRE THAT ANY DIRECTOR, OFFICER, KEY EMPLOYEE OR COMMITTEE MEMBER WHO HAS A CONFLICT OF INTEREST MUST PROMPTLY NOTIFY THE BOARD OF THE CONFLICT AND THE CONFLICT WILL BE DULY NOTED IN THE BOARD OF DIRECTOR MEETING MINUTES. THE PERSON WITH THE CONFLICT WILL BE EXCLUDED FROM FUTURE DECISION MAKING ON THIS ISSUE. THE BOARD MAY TAKE FORMAL, CORRECTIVE AND DISCIPLINARY ACTIONS IF PROPER DISCLOSURE OF CONFLICTS OF INTEREST ARE NOT MADE.

FORM 990, PART VI, LINE 19:

DOCUMENTS APPROVED BY THE BOARD OF DIRECTORS, INCLUDING THE ACADEMY'S AUDITED FINANCIAL STATEMENTS, ARE AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART IX

THE ACADEMY'S FUNCTIONAL EXPENSES CONSISTS PRIMARILY OF A MANAGEMENT FEE TO NATIONAL HERITAGE ACADEMIES (NHA) FOR THE COMPREHENSIVE EDUCATIONAL MANAGEMENT SERVICES PROVIDED, IN LINE WITH THE MANAGEMENT AGREEMENT APPROVED AS PART OF THE CHARTERING PROCESS. THE FUNCTIONAL EXPENSES REPORTED IN PART IX ARE THE EXPENSES INCURRED BY NHA ON BEHALF OF THE SCHOOL AND PAID USING THE FUNDS REMITTED BY THE ACADEMY UNDER MANAGEMENT FEE. UNDER THE NHA MANAGEMENT AGREEMENT, NHA PROVIDES THE SCHOOL WITH ALL PERSONNEL REQUIRED (I.E. TEACHERS, SPECIALIZED AIDE, PRINCIPALS, OFFICE STAFF, ETC). THE SALARIES AND WAGES AND RELATED PAYROLL EXPENSES REPORTED IN THE STATEMENT OF FUNCTIONAL EXPENSES IN PART IX REFER TO THE COMPENSATION EXPENSES OF THESE NHA EMPLOYEES WORKING AT THE ACADEMY. LIKEWISE, ALL EXPENSES REPORTED IN PART IX ARE EXPENSES INCURRED IN THE

Name of the organization GREENSBORO ACADEMY, INC.	Employer identification number 56-2108613
--	--

OPERATION OF THE ACADEMY BY NHA.

ATTACHMENT 1

FORM 990, PART III, LINE 1 - ORGANIZATION'S MISSION

TO OPERATE A PUBLIC SCHOOL ACADEMY AND TO PROVIDE EDUCATION TO CHILDREN IN GRADES KINDERGARTEN THROUGH EIGHTH GRADE BASED ON RIGOROUS TEACHING METHODS, PARENTAL INVOLVEMENT, STUDENT RESPONSIBILITY, AND BASIC MORAL VALUES. ENROLLMENT IS OPEN TO ALL APPROPRIATELY AGED CHILDREN WITHOUT REGARD TO GENDER, ETHNIC BACKGROUND, DISABILITY, AND/OR RELIGIOUS AFFILIATION.

ATTACHMENT 2

990, PART VII- COMPENSATION OF THE FIVE HIGHEST PAID IND. CONTRACTORS

<u>NAME AND ADDRESS</u>	<u>DESCRIPTION OF SERVICES</u>	<u>COMPENSATION</u>
NATIONAL HERITAGE ACADEMIES, INC. 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS, MI 49512	MANAGEMENT SERVICES	5,741,598.

Form **990**  
(Rev. January 2020)  
Department of the Treasury  
Internal Revenue Service

# Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

**2019**

▶ Do not enter social security numbers on this form as it may be made public.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

**Open to Public Inspection**

**A** For the **2019** calendar year, or tax year beginning **07/01, 2019**, and ending **06/30, 2020**

<b>B</b> Check if applicable:  <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated return <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization GREENSBORO ACADEMY, INC. Doing business as Number and street (or P.O. box if mail is not delivered to street address) Room/suite 4049 BATTLEGROUNDAVE City or town, state or province, country, and ZIP or foreign postal code GREENSBORO, NC 27410-8410				<b>D</b> Employer identification number 56-2108613	
	<b>F</b> Name and address of principal officer: ROBERT GRAY 4049 BATTLEGROUNDAVE, GREENSBORO, NC 27410-8410				<b>E</b> Telephone number (616) 222-1700	
	<b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) ◀ (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527				<b>G</b> Gross receipts \$ 6,860,293.	
	<b>J</b> Website: WWW.NHASCHOOLS.COM				<b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. (see instructions)	
<b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶				<b>L</b> Year of formation: 1998 <b>M</b> State of legal domicile: NC		

**Part I Summary**

<b>Activities &amp; Governance</b>	<b>1</b>	Briefly describe the organization's mission or most significant activities: TO OPERATE A PUBLIC SCHOOL ACADEMY WHICH PROVIDES EDUCATION BASED ON RIGOROUS TEACHING METHODS, PARENTAL INVOLVEMENT, STUDENT RESPONSIBILITY, AND BASIC MORAL VALUES.		
	<b>2</b>	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b>	Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	5.
	<b>4</b>	Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	5.
	<b>5</b>	Total number of individuals employed in calendar year 2019 (Part V, line 2a)	<b>5</b>	0.
	<b>6</b>	Total number of volunteers (estimate if necessary)	<b>6</b>	204.
	<b>7a</b>	Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	0.
	<b>b</b> Net unrelated business taxable income from Form 990-T, line 39	<b>7b</b>		
<b>Revenue</b>	<b>8</b>	Contributions and grants (Part VIII, line 1h)	<b>Prior Year</b>	<b>Current Year</b>
	<b>9</b>	Program service revenue (Part VIII, line 2g)	6,543,665.	6,750,778.
	<b>10</b>	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	140,694.	74,515.
	<b>11</b>	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	0.	0.
	<b>12</b>	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	35,000.	35,000.
			6,719,359.	6,860,293.
<b>Expenses</b>	<b>13</b>	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.	0.
	<b>14</b>	Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	<b>15</b>	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	2,914,976.	3,096,731.
	<b>16a</b>	Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	<b>b</b>	Total fundraising expenses (Part IX, column (D), line 25) ▶ 0.		
	<b>17</b>	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	3,816,502.	3,754,738.
<b>18</b>	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	6,731,478.	6,851,469.	
<b>19</b>	Revenue less expenses. Subtract line 18 from line 12	-12,119.	8,824.	
<b>Net Assets or Fund Balances</b>	<b>20</b>	Total assets (Part X, line 16)	<b>Beginning of Current Year</b>	<b>End of Year</b>
	<b>21</b>	Total liabilities (Part X, line 26)	207,473.	558,124.
	<b>22</b>	Net assets or fund balances. Subtract line 21 from line 20	131,897.	473,724.
		75,576.	84,400.	

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer ROBERT GRAY Type or print name and title	Date PRESIDENT
------------------	---	-------------------

<b>Paid Preparer Use Only</b>	Print/Type preparer's name JACOB COOK	Preparer's signature 	Date 02/19/2021	Check <input type="checkbox"/> if self-employed	PTIN P01240455
	Firm's name ▶ BDO USA, LLP			Firm's EIN ▶ 13-5381590	
	Firm's address ▶ 200 OTTAWA AVE NW STE 300 GRAND RAPIDS, MI 49503			Phone no. 616-774-7000	

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

For Paperwork Reduction Act Notice, see the separate instructions. Form **990** (2019)

Form **8868**

(Rev. January 2020)

Department of the Treasury  
Internal Revenue Service

# Application for Automatic Extension of Time To File an Exempt Organization Return

► **File a separate application for each return.**  
► **Go to [www.irs.gov/Form8868](http://www.irs.gov/Form8868) for the latest information.**

OMB No. 1545-0047

**Electronic filing (e-file).** You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits](http://www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits).

**Automatic 6-Month Extension of Time.** Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

<b>Type or print</b>  File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions.  GREENSBORO ACADEMY, INC.	Taxpayer identification number (TIN)  56-2108613
	Number, street, and room or suite no. If a P.O. box, see instructions. 4049 BATTLEGROUND AVE	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. GREENSBORO, NC 27410-8410	

Enter the Return Code for the return that this application is for (file a separate application for each return) . . . . .

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

COREY BALKON  
• The books are in the care of ► 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS MI 49512

Telephone No. ► 616 222-1700 Fax No. ► 616 831-6311

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ . If this is for the whole group, check this box  . If it is for part of the group, check this box  and attach a list with the names and TINs of all members the extension is for.

1 I request an automatic 6-month extension of time until 05/17, 2021, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- calendar year 20 \_\_\_\_ or
- tax year beginning 07/01, 2019, and ending 06/30, 2020.

2 If the tax year entered in line 1 is for less than 12 months, check reason:  Initial return  Final return  Change in accounting period

<b>3a</b> If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	0.
<b>b</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	0.
<b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	0.

**Caution:** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III [X]

1 Briefly describe the organization's mission:

ATTACHMENT 1

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No

[ ] Yes [X] No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [ ] Yes [X] No

[ ] Yes [X] No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ 5,153,106. including grants of \$ ) (Revenue \$ 71,185. )

OPERATED AN EDUCATIONAL INSTITUTION ORGANIZED AS A PUBLIC SCHOOL ACADEMY. THE ACADEMY PROVIDES EDUCATION, AT NO COST TO THE PARENT, TO STUDENTS IN KINDERGARTEN THROUGH EIGHTH GRADE. THE ACADEMY OPERATES UNDER A CHARTER APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION.

4b (Code: ) (Expenses \$ 11,271. including grants of \$ ) (Revenue \$ 3,330. )

OPERATED A SCHOOL FOOD SERVICE PROGRAM AT THE PUBLIC SCHOOL ACADEMY DESCRIBED ABOVE. THE ACADEMY OFFERS A LUNCH PROGRAM AVAILABLE AT THE SCHOOL.

4c (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4d Other program services (Describe on Schedule O.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses 5,164,377.

**Part IV Checklist of Required Schedules**

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A.</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> (see instructions)?	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I.</i>		X
4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II.</i>		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III.</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I.</i>		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II.</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III.</i>		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV.</i>		X
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? <i>If "Yes," complete Schedule D, Part V.</i>		X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI.</i>	X	
b Did the organization report an amount for investments-other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII.</i>		X
c Did the organization report an amount for investments-program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII.</i>		X
d Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX.</i>		X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X.</i>	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X.</i>		X
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII.</i>	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional.</i>		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E.</i>	X	
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV.</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV.</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV.</i>		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I (see instructions).</i>		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II.</i>		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III.</i>		X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H.</i>		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II.</i>		X

Part IV Checklist of Required Schedules (continued)

Table with 3 columns: Question number, Question text, Yes, No. Rows 22-38 covering various IRS schedule requirements.

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V [ ]

Table with 3 columns: Question number, Question text, Yes, No. Rows 1a-1c regarding Form 1096, W-2G forms, and backup withholding rules.

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

Table with 3 columns: Question, Yes, No. Rows include questions 2a through 16 regarding employee reporting, tax returns, business income, foreign accounts, prohibited transactions, and charitable trusts.

**Part VI Governance, Management, and Disclosure** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

**Section A. Governing Body and Management**

		Yes	No
<b>1a</b>	Enter the number of voting members of the governing body at the end of the tax year . . . . . If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O. . . . .		
<b>1b</b>	Enter the number of voting members included on line 1a, above, who are independent. . . . .		
<b>2</b>	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? . . . . .		X
<b>3</b>	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person? . . . . .	X	
<b>4</b>	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? . . . . .		X
<b>5</b>	Did the organization become aware during the year of a significant diversion of the organization's assets? . . . . .		X
<b>6</b>	Did the organization have members or stockholders? . . . . .		X
<b>7a</b>	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? . . . . .		X
<b>7b</b>	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? . . . . .		X
<b>8</b>	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>8a</b>	a The governing body? . . . . .	X	
<b>8b</b>	b Each committee with authority to act on behalf of the governing body? . . . . .	X	
<b>9</b>	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O. . . . .		X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
<b>10a</b>	Did the organization have local chapters, branches, or affiliates? . . . . .		X
<b>10b</b>	b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? . . . . .		
<b>11a</b>	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . . . . .	X	
<b>11b</b>	Describe in Schedule O the process, if any, used by the organization to review this Form 990. . . . .		
<b>12a</b>	Did the organization have a written conflict of interest policy? If "No," go to line 13 . . . . .	X	
<b>12b</b>	b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? . . . . .	X	
<b>12c</b>	c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done . . . . .	X	
<b>13</b>	Did the organization have a written whistleblower policy? . . . . .		X
<b>14</b>	Did the organization have a written document retention and destruction policy? . . . . .	X	
<b>15</b>	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>15a</b>	a The organization's CEO, Executive Director, or top management official . . . . .		X
<b>15b</b>	b Other officers or key employees of the organization . . . . .		X
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions). . . . .		
<b>16a</b>	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? . . . . .		X
<b>16b</b>	b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? . . . . .		

**Section C. Disclosure**

- 17** List the states with which a copy of this Form 990 is required to be filed ► NONE
- 18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
 Own website     Another's website     Upon request     Other (explain on Schedule O)
- 19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records ►  
COREY BALKON 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS, MI 49512 (616) 222-1700

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations. See instructions for the order in which to list the persons above.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) ROBERT GRAY PRESIDENT	1.00 0.	X		X				0.	0.	0.
(2) BRIAN CLARIDA VICE PRESIDENT	1.00 0.	X		X				0.	0.	0.
(3) ZACH SCHWARZ TREASURER	1.00 0.	X		X				0.	0.	0.
(4) JENNIFER CLARK SECRETARY	1.00 0.	X		X				0.	0.	0.
(5) TIFANIE RUDD DIRECTOR	1.00 0.	X						0.	0.	0.
(6)										
(7)										
(8)										
(9)										
(10)										
(11)										
(12)										
(13)										
(14)										



**Part VIII Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514	
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1a</b>	Federated campaigns . . . . .	<b>1a</b>					
	<b>b</b>	Membership dues . . . . .	<b>1b</b>					
	<b>c</b>	Fundraising events . . . . .	<b>1c</b>					
	<b>d</b>	Related organizations . . . . .	<b>1d</b>					
	<b>e</b>	Government grants (contributions) . .	<b>1e</b>	6,750,778.				
	<b>f</b>	All other contributions, gifts, grants, and similar amounts not included above .	<b>1f</b>					
	<b>g</b>	Noncash contributions included in lines 1a-1f. . . . .	<b>1g</b>	\$				
	<b>h</b>	<b>Total.</b> Add lines 1a-1f . . . . . ▶		6,750,778.				
	<b>Program Service Revenue</b>				Business Code			
<b>2a</b>		FOOD SERVICE PROGRAM		611600	3,330.	3,330.		
<b>b</b>		MISCELLANEOUS ACTIVITY FEES		900099	71,185.	71,185.		
<b>c</b>								
<b>d</b>								
<b>e</b>								
<b>g</b>		<b>Total.</b> Add lines 2a-2f . . . . . ▶			74,515.			
<b>Other Revenue</b>	<b>3</b>	Investment income (including dividends, interest, and other similar amounts). . . . . ▶			0.			
	<b>4</b>	Income from investment of tax-exempt bond proceeds . ▶			0.			
	<b>5</b>	Royalties . . . . . ▶			0.			
	<b>6a</b>	Gross rents . . . . .	<b>6a</b>	(i) Real	(ii) Personal			
	<b>b</b>	Less: rental expenses	<b>6b</b>					
	<b>c</b>	Rental income or (loss)	<b>6c</b>					
	<b>d</b>	Net rental income or (loss) . . . . . ▶			0.			
	<b>7a</b>	Gross amount from sales of assets other than inventory	<b>7a</b>	(i) Securities	(ii) Other			
	<b>b</b>	Less: cost or other basis and sales expenses . .	<b>7b</b>					
	<b>c</b>	Gain or (loss) . . . . .	<b>7c</b>					
	<b>d</b>	Net gain or (loss) . . . . . ▶			0.			
<b>8a</b>	Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18 . . . . .	<b>8a</b>		0.				
			<b>8b</b>	0.				
			<b>c</b>	Net income or (loss) from fundraising events. . . . . ▶		0.		
<b>9a</b>	Gross income from gaming activities. See Part IV, line 19 . . . . .	<b>9a</b>		0.				
			<b>9b</b>	0.				
			<b>c</b>	Net income or (loss) from gaming activities. . . . . ▶		0.		
<b>10a</b>	Gross sales of inventory, less returns and allowances . . . . .	<b>10a</b>		0.				
			<b>10b</b>	0.				
			<b>c</b>	Net income or (loss) from sales of inventory. . . . . ▶		0.		
<b>Miscellaneous Revenue</b>				Business Code				
	<b>11a</b>	DISCRETIONARY SUPPORT		611710	35,000.		35,000.	
	<b>b</b>							
	<b>c</b>							
	<b>e</b>	<b>Total.</b> Add lines 11a-11d . . . . . ▶			35,000.			
<b>12</b>	<b>Total revenue.</b> See instructions . . . . . ▶			6,860,293.	74,515.		35,000.	

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX  X

<b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b>	<b>(A)</b> Total expenses	<b>(B)</b> Program service expenses	<b>(C)</b> Management and general expenses	<b>(D)</b> Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 . . . . .	0.			
2 Grants and other assistance to domestic individuals. See Part IV, line 22 . . . . .	0.			
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 . . . . .	0.			
4 Benefits paid to or for members . . . . .	0.			
5 Compensation of current officers, directors, trustees, and key employees . . . . .	0.			
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .	0.			
7 Other salaries and wages . . . . .	2,328,763.	2,328,763.		
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	57,638.	57,638.		
9 Other employee benefits . . . . .	538,805.	538,805.		
10 Payroll taxes . . . . .	171,525.	171,525.		
11 Fees for services (nonemployees):				
a Management . . . . .	0.			
b Legal . . . . .	0.			
c Accounting . . . . .	191,801.	9,612.	182,189.	
d Lobbying . . . . .	0.			
e Professional fundraising services. See Part IV, line 17.	0.			
f Investment management fees . . . . .	0.			
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.) . . . . .	323,187.	323,187.		
12 Advertising and promotion . . . . .	61,313.	88.	61,225.	
13 Office expenses . . . . .	240,251.	240,251.		
14 Information technology . . . . .	233,747.	9,041.	224,706.	
15 Royalties . . . . .	0.			
16 Occupancy . . . . .	1,387,853.	1,354,180.	33,673.	
17 Travel . . . . .	1,871.	1,871.		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	0.			
19 Conferences, conventions, and meetings . . . . .	29,691.	29,691.		
20 Interest . . . . .	0.			
21 Payments to affiliates . . . . .	0.			
22 Depreciation, depletion, and amortization . . . . .	6,885.	6,885.		
23 Insurance . . . . .	23,395.	23,395.		
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a INSTRUCTIONAL SUPPORT	381,440.		381,440.	
b HUMAN RESOURCES	322,217.		322,217.	
c ACADEMIC & GENERAL SUPPORT	192,085.		192,085.	
d DISCRETIONARY EXPENSES	112,718.		112,718.	
e All other expenses _____	246,284.	69,445.	176,839.	
<b>25 Total functional expenses.</b> Add lines 1 through 24e	<b>6,851,469.</b>	<b>5,164,377.</b>	<b>1,687,092.</b>	
<b>26 Joint costs.</b> Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720) . . . . .	0.			

**Part X Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part X

		(A) Beginning of year		(B) End of year	
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing . . . . .	85,744.	<b>1</b>	443,165.	
	<b>2</b> Savings and temporary cash investments . . . . .	0.	<b>2</b>	0.	
	<b>3</b> Pledges and grants receivable, net . . . . .	82,166.	<b>3</b>	81,066.	
	<b>4</b> Accounts receivable, net. . . . .	0.	<b>4</b>	0.	
	<b>5</b> Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons . . . . .	0.	<b>5</b>	0.	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) . . . . .	0.	<b>6</b>	0.	
	<b>7</b> Notes and loans receivable, net . . . . .	0.	<b>7</b>	0.	
	<b>8</b> Inventories for sale or use . . . . .	0.	<b>8</b>	0.	
	<b>9</b> Prepaid expenses and deferred charges . . . . .	0.	<b>9</b>	0.	
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D . . . . .	<b>10a</b> 134,762.			
	<b>b</b> Less: accumulated depreciation . . . . .	<b>10b</b> 100,869.			
			39,563.	<b>10c</b>	33,893.
	<b>11</b> Investments - publicly traded securities . . . . .	0.	<b>11</b>	0.	
	<b>12</b> Investments - other securities. See Part IV, line 11 . . . . .	0.	<b>12</b>	0.	
	<b>13</b> Investments - program-related. See Part IV, line 11. . . . .	0.	<b>13</b>	0.	
	<b>14</b> Intangible assets . . . . .	0.	<b>14</b>	0.	
<b>15</b> Other assets. See Part IV, line 11 . . . . .	0.	<b>15</b>	0.		
<b>16 Total assets.</b> Add lines 1 through 15 (must equal line 33) . . . . .		207,473.	<b>16</b>	558,124.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .	0.	<b>17</b>	0.	
	<b>18</b> Grants payable . . . . .	0.	<b>18</b>	0.	
	<b>19</b> Deferred revenue. . . . .	47,681.	<b>19</b>	57,412.	
	<b>20</b> Tax-exempt bond liabilities. . . . .	0.	<b>20</b>	0.	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D. . . . .	0.	<b>21</b>	0.	
	<b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons . . . . .	0.	<b>22</b>	0.	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties . . . . .	0.	<b>23</b>	0.	
	<b>24</b> Unsecured notes and loans payable to unrelated third parties . . . . .	0.	<b>24</b>	0.	
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D . . . . .	84,216.	<b>25</b>	416,312.	
	<b>26 Total liabilities.</b> Add lines 17 through 25. . . . .		131,897.	<b>26</b>	473,724.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27, 28, 32, and 33.</b>				
	<b>27</b> Net assets without donor restrictions . . . . .	75,576.	<b>27</b>	84,400.	
	<b>28</b> Net assets with donor restrictions. . . . .	0.	<b>28</b>	0.	
	<b>Organizations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 29 through 33.</b>				
	<b>29</b> Capital stock or trust principal, or current funds . . . . .		<b>29</b>		
	<b>30</b> Paid-in or capital surplus, or land, building, or equipment fund. . . . .		<b>30</b>		
	<b>31</b> Retained earnings, endowment, accumulated income, or other funds. . . . .		<b>31</b>		
	<b>32</b> Total net assets or fund balances . . . . .	75,576.	<b>32</b>	84,400.	
<b>33</b> Total liabilities and net assets/fund balances . . . . .		207,473.	<b>33</b>	558,124.	

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	6,860,293.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	6,851,469.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	8,824.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	<b>4</b>	75,576.
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	0.
<b>6</b>	Donated services and use of facilities	<b>6</b>	0.
<b>7</b>	Investment expenses	<b>7</b>	0.
<b>8</b>	Prior period adjustments	<b>8</b>	0.
<b>9</b>	Other changes in net assets or fund balances (explain on Schedule O)	<b>9</b>	0.
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	<b>10</b>	84,400.

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII.

- 1** Accounting method used to prepare the Form 990:  Cash  Accrual  Other \_\_\_\_\_  
If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.
- 2a** Were the organization's financial statements compiled or reviewed by an independent accountant? . . . . .  
If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- b** Were the organization's financial statements audited by an independent accountant? . . . . .  
If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- c** If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? . . . . .  
If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.
- 3a** As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? . . . . .
- b** If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits . . .

	Yes	No
<b>2a</b>		X
<b>2b</b>	X	
<b>2c</b>	X	
<b>3a</b>		X
<b>3b</b>		

Form **990** (2019)

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

**Public Charity Status and Public Support**

OMB No. 1545-0047

**2019**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Name of the organization

GREENSBORO ACADEMY, INC.

Employer identification number

56-2108613

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2  A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990 or 990-EZ).)
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8  A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9  An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10  An organization that normally receives: (1) more than 33 1/3 % of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3 % of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 11  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**.  
Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
  - a  **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b  **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c  **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d  **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e  Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations . . . . .

g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
<b>Total</b>						

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule A (Form 990 or 990-EZ) 2019

JSA  
9E1210 1.000

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**  
 (Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") . . . . .						
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .						
<b>4 Total.</b> Add lines 1 through 3 . . . . .						
<b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f). . . . .						
<b>6 Public support.</b> Subtract line 5 from line 4						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(f) Total
<b>7</b> Amounts from line 4 . . . . .						
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources . . . . .						
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on . . . . .						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . . . .						
<b>11 Total support.</b> Add lines 7 through 10 . . . . .						
<b>12</b> Gross receipts from related activities, etc. (see instructions) . . . . .					12	
<b>13 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . .						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

<b>14</b> Public support percentage for 2019 (line 6, column (f) divided by line 11, column (f)). . . . .	14	%
<b>15</b> Public support percentage from 2018 Schedule A, Part II, line 14 . . . . .	15	%
<b>16a 33 1/3% support test - 2019.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
<b>b 33 1/3% support test - 2018.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
<b>17a 10%-facts-and-circumstances test - 2019.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here</b> . Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
<b>b 10%-facts-and-circumstances test - 2018.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here</b> . Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . .		<input type="checkbox"/>

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**  
 (Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II.  
 If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose . . . . .						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 . . . . .						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .						
<b>6 Total.</b> Add lines 1 through 5 . . . . .						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons . . . . .						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year . . . . .						
<b>c</b> Add lines 7a and 7b. . . . .						
<b>8 Public support.</b> (Subtract line 7c from line 6.) . . . . .						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(f) Total
<b>9</b> Amounts from line 6. . . . .						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources . . . . .						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 . . . . .						
<b>c</b> Add lines 10a and 10b . . . . .						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on . . . . .						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . . . .						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.) . . . . .						

**14 First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** . . . . .

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2019 (line 8, column (f), divided by line 13, column (f)) . . . . .	<b>15</b>	%
<b>16</b> Public support percentage from 2018 Schedule A, Part III, line 15 . . . . .	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for <b>2019</b> (line 10c, column (f), divided by line 13, column (f)). . . . .	<b>17</b>	%
<b>18</b> Investment income percentage from <b>2018</b> Schedule A, Part III, line 17 . . . . .	<b>18</b>	%

**19a 33 1/3% support tests - 2019.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization . ►

**b 33 1/3% support tests - 2018.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ►

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ►

**Part IV Supporting Organizations**

(Complete only if you checked a box in line 12 on Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i>		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
b <b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c <b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
b Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

**Part IV Supporting Organizations (continued)**

	Yes	No
<b>11</b> Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b> A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?	<b>11a</b>	
<b>b</b> A family member of a person described in (a) above?	<b>11b</b>	
<b>c</b> A 35% controlled entity of a person described in (a) or (b) above? <i>If "Yes" to a, b, or c, provide detail in Part VI.</i>	<b>11c</b>	

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i>	<b>1</b>	
<b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.</i>	<b>2</b>	

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i>	<b>1</b>	

**Section D. All Type III Supporting Organizations**

	Yes	No
<b>1</b> Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	<b>1</b>	
<b>2</b> Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>	<b>2</b>	
<b>3</b> By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>	<b>3</b>	

**Section E. Type III Functionally Integrated Supporting Organizations**

<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
<b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
<b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
<b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).			
<b>2</b> Activities Test. Answer (a) and (b) below.		Yes	No
<b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>	<b>2a</b>		
<b>b</b> Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>	<b>2b</b>		
<b>3</b> Parent of Supported Organizations. Answer (a) and (b) below.			
<b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>Provide details in Part VI.</i>	<b>3a</b>		
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>	<b>3b</b>		

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

<b>Section A - Adjusted Net Income</b>		(A) Prior Year	(B) Current Year (optional)
<b>1</b> Net short-term capital gain	<b>1</b>		
<b>2</b> Recoveries of prior-year distributions	<b>2</b>		
<b>3</b> Other gross income (see instructions)	<b>3</b>		
<b>4</b> Add lines 1 through 3.	<b>4</b>		
<b>5</b> Depreciation and depletion	<b>5</b>		
<b>6</b> Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	<b>6</b>		
<b>7</b> Other expenses (see instructions)	<b>7</b>		
<b>8 Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)	<b>8</b>		
<b>Section B - Minimum Asset Amount</b>		(A) Prior Year	(B) Current Year (optional)
<b>1</b> Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):			
<b>a</b> Average monthly value of securities	<b>1a</b>		
<b>b</b> Average monthly cash balances	<b>1b</b>		
<b>c</b> Fair market value of other non-exempt-use assets	<b>1c</b>		
<b>d Total</b> (add lines 1a, 1b, and 1c)	<b>1d</b>		
<b>e Discount</b> claimed for blockage or other factors (explain in detail in <b>Part VI</b> ):			
<b>2</b> Acquisition indebtedness applicable to non-exempt-use assets	<b>2</b>		
<b>3</b> Subtract line 2 from line 1d.	<b>3</b>		
<b>4</b> Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions).	<b>4</b>		
<b>5</b> Net value of non-exempt-use assets (subtract line 4 from line 3)	<b>5</b>		
<b>6</b> Multiply line 5 by .035.	<b>6</b>		
<b>7</b> Recoveries of prior-year distributions	<b>7</b>		
<b>8 Minimum Asset Amount</b> (add line 7 to line 6)	<b>8</b>		
<b>Section C - Distributable Amount</b>			Current Year
<b>1</b> Adjusted net income for prior year (from Section A, line 8, Column A)	<b>1</b>		
<b>2</b> Enter 85% of line 1.	<b>2</b>		
<b>3</b> Minimum asset amount for prior year (from Section B, line 8, Column A)	<b>3</b>		
<b>4</b> Enter greater of line 2 or line 3.	<b>4</b>		
<b>5</b> Income tax imposed in prior year	<b>5</b>		
<b>6 Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	<b>6</b>		
<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).			

Schedule A (Form 990 or 990-EZ) 2019

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)**

Section D - Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in <b>Part VI</b> ). See instructions.	
7 <b>Total annual distributions.</b> Add lines 1 through 6.	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in <b>Part VI</b> ). See instructions.	
9 Distributable amount for 2019 from Section C, line 6	
10 Line 8 amount divided by line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2019	(iii) Distributable Amount for 2019
1 Distributable amount for 2019 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2019 (reasonable cause required - explain in <b>Part VI</b> ). See instructions.			
3 Excess distributions carryover, if any, to 2019			
a From 2014 . . . . .			
b From 2015 . . . . .			
c From 2016 . . . . .			
d From 2017 . . . . .			
e From 2018 . . . . .			
f <b>Total</b> of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2019 distributable amount			
i Carryover from 2014 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2019 from Section D, line 7:                     \$			
a Applied to underdistributions of prior years			
b Applied to 2019 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4.			
5 Remaining underdistributions for years prior to 2019, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in <b>Part VI</b> . See instructions.			
6 Remaining underdistributions for 2019. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in <b>Part VI</b> . See instructions.			
7 <b>Excess distributions carryover to 2020.</b> Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2015 . . . .			
b Excess from 2016 . . . .			
c Excess from 2017 . . . .			
d Excess from 2018 . . . .			
e Excess from 2019 . . . .			

**Part VI** **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

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**Schedule B**  
 (Form 990, 990-EZ,  
 or 990-PF)  
 Department of the Treasury  
 Internal Revenue Service

**Schedule of Contributors**

OMB No. 1545-0047

**2019**

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**  
 ▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.**

Name of the organization GREENSBORO ACADEMY, INC.	Employer identification number 56-2108613
--	--

**Organization type** (check one):

**Filers of:**

**Section:**

- Form 990 or 990-EZ  501(c)(3 ) (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- 527 political organization
- Form 990-PF  501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year . . . . . ▶ \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization **GREENSBORO ACADEMY, INC.**

**Employer identification number**  
56-2108613

**Part I** **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		\$ 4,584,769.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2		\$ 1,984,930.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3		\$ 181,079.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization **GREENSBORO ACADEMY, INC.**

**Employer identification number**

56-2108613

**Part II** **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____

Name of organization **GREENSBORO ACADEMY, INC.**

Employer identification number

56-2108613

**Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor.** Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$ \_\_\_\_\_  
 Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____	_____ _____	_____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____	_____ _____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____	_____ _____	_____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____	_____ _____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____	_____ _____	_____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____	_____ _____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____	_____ _____	_____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____	_____ _____

SCHEDULE D (Form 990)

Supplemental Financial Statements

OMB No. 1545-0047

2019

Open to Public Inspection

Department of the Treasury Internal Revenue Service

Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

Name of the organization

GREENSBORO ACADEMY, INC.

Employer identification number

56-2108613

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

Table with 3 columns: Line number, Description, and checkboxes for Yes/No. Rows include total number at end of year, aggregate values, and questions about donor advised funds.

Part II Conservation Easements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

Table with 3 columns: Line number, Description, and checkboxes for Yes/No. Rows include purpose of easements, total number, acreage, and monitoring expenses.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

Table with 3 columns: Line number, Description, and checkboxes for Yes/No. Rows include questions about reporting art and historical treasures.

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule D (Form 990) 2019

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** *(continued)*

- 3** Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):
- a**  Public exhibition
  - b**  Scholarly research
  - c**  Preservation for future generations
  - d**  Loan or exchange program
  - e**  Other \_\_\_\_\_
- 4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5** During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? . . . . .  **Yes**  **No**

**Part IV Escrow and Custodial Arrangements.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a** Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? . . . . .  **Yes**  **No**
- b** If "Yes," explain the arrangement in Part XIII and complete the following table:
- |  | Amount    |
|--|-----------|
| <b>c</b> Beginning balance . . . . .             | <b>1c</b> |
| <b>d</b> Additions during the year . . . . .     | <b>1d</b> |
| <b>e</b> Distributions during the year . . . . . | <b>1e</b> |
| <b>f</b> Ending balance . . . . .                | <b>1f</b> |
- 2a** Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  **Yes**  **No**
- b** If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII . . . . .

**Part V Endowment Funds.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
<b>1a</b> Beginning of year balance . . . . .					
<b>b</b> Contributions . . . . .					
<b>c</b> Net investment earnings, gains, and losses . . . . .					
<b>d</b> Grants or scholarships . . . . .					
<b>e</b> Other expenditures for facilities and programs . . . . .					
<b>f</b> Administrative expenses . . . . .					
<b>g</b> End of year balance . . . . .					

- 2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a** Board designated or quasi-endowment ▶ \_\_\_\_\_ %
  - b** Permanent endowment ▶ \_\_\_\_\_ %
  - c** Term endowment ▶ \_\_\_\_\_ %
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- |   | Yes           | No |
|---|---------------|----|
| <b>(i)</b> Unrelated organizations . . . . .  | <b>3a(i)</b>  |    |
| <b>(ii)</b> Related organizations . . . . .   | <b>3a(ii)</b> |    |
| <b>b</b> If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? . . . . . | <b>3b</b>     |    |
- 4** Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
<b>1a</b> Land . . . . .				
<b>b</b> Buildings . . . . .				
<b>c</b> Leasehold improvements . . . . .		59,350.	33,281.	26,069.
<b>d</b> Equipment . . . . .		75,412.	67,588.	7,824.
<b>e</b> Other . . . . .				
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) . . . . .				33,893.

**Part VII Investments - Other Securities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives . . . . .		
(2) Closely held equity interests . . . . .		
(3) Other _____		
(A) _____		
(B) _____		
(C) _____		
(D) _____		
(E) _____		
(F) _____		
(G) _____		
(H) _____		
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 12.) . ▶		

**Part VIII Investments - Program Related.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) _____		
(2) _____		
(3) _____		
(4) _____		
(5) _____		
(6) _____		
(7) _____		
(8) _____		
(9) _____		
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 13.) . ▶		

**Part IX Other Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) _____	
(2) _____	
(3) _____	
(4) _____	
(5) _____	
(6) _____	
(7) _____	
(8) _____	
(9) _____	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.) . . . . . ▶	

**Part X Other Liabilities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) CONTRACTED SERVICE FEE PAYABLE	416,312.
(3) _____	
(4) _____	
(5) _____	
(6) _____	
(7) _____	
(8) _____	
(9) _____	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) . . . . . ▶	416,312.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII



**Part XIII** Supplemental Information *(continued)*

SCHEDULE D, PART X, LINE 2:

THE AUDITED FINANCIAL STATEMENTS DO NOT REFERENCE ANY UNCERTAIN INCOME  
TAX POSITIONS.

SCHEDULE D, PART XI, LINE 4B

DISCRETIONARY SUPPORT: \$35,000

SCHEDULE D, PART XII, LINE 4B

DISCRETIONARY SUPPORT: \$35,000

**SCHEDULE E  
(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Schools**

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.**  
▶ **Attach to Form 990 or Form 990-EZ.**  
▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.**

OMB No. 1545-0047

**2019**

**Open to Public Inspection**

Name of the organization  
GREENSBORO ACADEMY, INC.

Employer identification number  
56-2108613

**Part I**

	YES	NO
<b>1</b> Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body? . . . . .	X	
<b>2</b> Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships? . . . . .	X	
<b>3</b> Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe. If "No," please explain. If you need more space, use Part II . . . . .	X	
SEE SUPPLEMENTAL PAGE		
<b>4</b> Does the organization maintain the following?		
<b>a</b> Records indicating the racial composition of the student body, faculty, and administrative staff? . . . . .	X	
<b>b</b> Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis? . . . . .	X	
<b>c</b> Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships? . . . . .	X	
<b>d</b> Copies of all material used by the organization or on its behalf to solicit contributions? . . . . .	X	
If you answered "No" to any of the above, please explain. If you need more space, use Part II.		
<b>5</b> Does the organization discriminate by race in any way with respect to:		
<b>a</b> Students' rights or privileges? . . . . .		X
<b>b</b> Admissions policies? . . . . .		X
<b>c</b> Employment of faculty or administrative staff? . . . . .		X
<b>d</b> Scholarships or other financial assistance? . . . . .		X
<b>e</b> Educational policies? . . . . .		X
<b>f</b> Use of facilities? . . . . .		X
<b>g</b> Athletic programs? . . . . .		X
<b>h</b> Other extracurricular activities? . . . . .		X
If you answered "Yes" to any of the above, please explain. If you need more space, use Part II.		
<b>6a</b> Does the organization receive any financial aid or assistance from a governmental agency? . . . . .	X	
<b>b</b> Has the organization's right to such aid ever been revoked or suspended? . . . . .		X
If you answered "Yes" on either line 6a or line 6b, explain on Part II.		
<b>7</b> Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If "No," explain on Part II . . . . .	X	

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or Form 990-EZ.

Schedule E (Form 990 or 990-EZ) 2019

**Part II** **Supplemental Information.** Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable. Also provide any other additional information (see instructions).

SCHEDULE E, PART I, LINE 3:

THE ACADEMY'S RACIALLY NONDISCRIMINATORY POLICY IS DISCLOSED ON ALL STUDENT APPLICATIONS AND PUBLISHED WITH OPEN ENROLLMENT ADVERTISEMENTS IN LOCAL NEWSPAPERS. THE NOTICE OF ITS RACIALLY NONDISCRIMINATORY POLICY IS PUBLISHED ANNUALLY DURING THE PERIOD PRIOR TO THE SCHOOLS SOLICITATION IN LOCAL NEWSPAPERS WHICH ARE AVAILABLE FOR CIRCULATION TO ALL SEGMENTS OF THE COMMUNITY. THE PARTICULARS AS TO COLUMN SIZE, PRINT AND TYPE SPECIFIED BY THE IRS ARE MET OR EXCEEDED.

SCHEDULE E, PART I, LINE 6 - EXPLANATION OF GOVERNMENT FINANCIAL AID:

THE SCHOOL RECEIVES SUPPORT GRANTS FROM FEDERAL, STATE AND LOCAL AGENCIES.

**SCHEDULE O**  
**(Form 990 or 990-EZ)**Department of the Treasury  
Internal Revenue Service

Name of the organization

GREENSBORO ACADEMY, INC.

**Supplemental Information to Form 990 or 990-EZ**Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2019****Open to Public  
Inspection**

Employer identification number

56-2108613

FORM 990, PART VI, LINE 3:

THE BOARD OF DIRECTORS OF THE ACADEMY HAS ENTERED INTO A MANAGEMENT AGREEMENT ("THE AGREEMENT") WITH NATIONAL HERITAGE ACADEMIES, INC. ("NHA") FOR THE PROVISION OF ALL EDUCATIONAL, MANAGEMENT AND BUSINESS SERVICES RELATED TO THE OPERATION OF THE ACADEMY. THE AGREEMENT WAS SUBMITTED AND APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION AS PART OF THE CHARTERING PROCESS. PURSUANT TO THE TERMS OF THE AGREEMENT, NHA RECEIVES ALL REVENUE ALLOCATED TO THE ACADEMY AS ITS MANAGEMENT FEE, FROM WHICH IT PROVIDES ITS COMPREHENSIVE EDUCATIONAL MANAGEMENT SERVICES AS SPECIFIED IN THE AGREEMENT AND REQUIRED UNDER THE ACADEMY'S CHARTER (I.E., ALL OF THE OPERATING COSTS OF THE ACADEMY IDENTIFIED IN THE BUDGET APPROVED BY THE ACADEMY'S BOARD). THE FUNCTIONAL EXPENSES REPORTED IN PART IX ARE THE EXPENSES PAID FROM THE FUNDS REMITTED UNDER THE NHA AGREEMENT. IN THE EVENT EXPENSES EXCEED REVENUES, NHA COVERS THE SHORTFALL WITH AN IN-KIND CONTRIBUTION. THIS AGREEMENT HAS BEEN APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION DURING THE ACADEMY'S CHARTER PROCESS AS WELL AS THE INTERNAL REVENUE SERVICE DURING THE ACADEMY'S EXEMPTION APPLICATION PROCESS.

FORM 990, PART VI, LINE 11B:

A DRAFT COPY OF THE FORM 990 WAS PROVIDED TO THE BOARD OF DIRECTORS IN A PACKAGE OF MATERIALS FOR REVIEW AND BOARD APPROVAL WAS OBTAINED PRIOR TO FINALIZATION.

Name of the organization GREENSBORO ACADEMY, INC.	Employer identification number 56-2108613
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FORM 990, PART VI, LINE 12C:

THE ACADEMY'S BYLAWS REQUIRE THAT ANY DIRECTOR, OFFICER, KEY EMPLOYEE OR COMMITTEE MEMBER WHO HAS A CONFLICT OF INTEREST MUST PROMPTLY NOTIFY THE BOARD OF THE CONFLICT AND THE CONFLICT WILL BE DULY NOTED IN THE BOARD OF DIRECTOR MEETING MINUTES. THE PERSON WITH THE CONFLICT WILL BE EXCLUDED FROM FUTURE DECISION MAKING ON THIS ISSUE. THE BOARD MAY TAKE FORMAL, CORRECTIVE AND DISCIPLINARY ACTIONS IF PROPER DISCLOSURE OF CONFLICTS OF INTEREST ARE NOT MADE.

FORM 990, PART VI, LINE 19:

DOCUMENTS APPROVED BY THE BOARD OF DIRECTORS, INCLUDING THE ACADEMY'S AUDITED FINANCIAL STATEMENTS, ARE AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART IX

THE ACADEMY'S FUNCTIONAL EXPENSES CONSISTS PRIMARILY OF A MANAGEMENT FEE TO NATIONAL HERITAGE ACADEMIES (NHA) FOR THE COMPREHENSIVE EDUCATIONAL MANAGEMENT SERVICES PROVIDED, IN LINE WITH THE MANAGEMENT AGREEMENT APPROVED AS PART OF THE CHARTERING PROCESS. THE FUNCTIONAL EXPENSES REPORTED IN PART IX ARE THE EXPENSES INCURRED BY NHA ON BEHALF OF THE SCHOOL AND PAID USING THE FUNDS REMITTED BY THE ACADEMY UNDER MANAGEMENT FEE. UNDER THE NHA MANAGEMENT AGREEMENT, NHA PROVIDES THE SCHOOL WITH ALL PERSONNEL REQUIRED (I.E. TEACHERS, SPECIALIZED AIDE, PRINCIPALS, OFFICE STAFF, ETC). THE SALARIES AND WAGES AND RELATED PAYROLL EXPENSES REPORTED IN THE STATEMENT OF FUNCTIONAL EXPENSES IN PART IX REFER TO THE COMPENSATION EXPENSES OF THESE NHA EMPLOYEES WORKING AT THE ACADEMY. LIKEWISE, ALL EXPENSES REPORTED IN PART IX ARE EXPENSES INCURRED IN THE

Name of the organization GREENSBORO ACADEMY, INC.	Employer identification number 56-2108613
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OPERATION OF THE ACADEMY BY NHA.

ATTACHMENT 1

FORM 990, PART III, LINE 1 - ORGANIZATION'S MISSION

TO OPERATE A PUBLIC SCHOOL ACADEMY AND TO PROVIDE EDUCATION TO CHILDREN IN GRADES KINDERGARTEN THROUGH EIGHTH GRADE BASED ON RIGOROUS TEACHING METHODS, PARENTAL INVOLVEMENT, STUDENT RESPONSIBILITY, AND BASIC MORAL VALUES. ENROLLMENT IS OPEN TO ALL APPROPRIATELY AGED CHILDREN WITHOUT REGARD TO GENDER, ETHNIC BACKGROUND, DISABILITY, AND/OR RELIGIOUS AFFILIATION.

ATTACHMENT 2

990, PART VII- COMPENSATION OF THE FIVE HIGHEST PAID IND. CONTRACTORS

<u>NAME AND ADDRESS</u>	<u>DESCRIPTION OF SERVICES</u>	<u>COMPENSATION</u>
NATIONAL HERITAGE ACADEMIES, INC. 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS, MI 49512	MANAGEMENT SERVICES	5,882,532.



# Appendix A3.1: Replication Educational Outcomes

## High Point Preparatory Academy

### Appendix A3.1 – Replication Educational Outcomes

Our Board intends to replicate the model currently in place at Greensboro Academy. Greensboro Academy received an “A” letter grade in the 2018-19 and 2017-18 school years, and an “A+NG” in the 2016-17 school year (the three years of publicly available accountability data prior to the COVID-19 pandemic’s impact).

Greensboro Academy Proficiency Data vs Guilford County Schools						
Year	Reading Proficiency			Math Proficiency		
	Greensboro Academy	Guilford County Schools	(+/-)	Greensboro Academy	Guilford County Schools	(+/-)
2018-19	86%	56%	30%	92%	52%	40%
2017-18	86%	53%	33%	90%	50%	40%
2016-17	85%	53%	32%	89%	51%	38%

Over the three years of publicly available accountability data prior to the COVID-19 pandemic’s impact, Greensboro Academy outperformed Guilford County Schools in both reading and math.

Beyond academic outcomes, Greensboro Academy has maintained balanced budgets in each year of its operation and has also received unqualified independent audits. The school has remained in full compliance with all charter, state, and federal requirements.

Greensboro Academy’s enrollment and expansive wait list (over 2,100 students) indicate the demand for a K-8 charter school in our area. This demand has been confirmed by an anonymous phone survey of 150 families in High Point. We asked if families would be likely to send their student to a new K-8 charter school in the area. The results confirmed our belief that there is a strong demand for our school:

- Over 55 percent of respondents said the quality of education in the local school district is average at best;
- Over 53 percent of families surveyed answered they would be very likely or likely to send their student to a new K-8 charter school in the area; and,
- Nearly 68 percent of families responding asked to be contacted with additional information if a new charter school were to open within the community.

*Replicated existing CMO/EMO model:* NHA has successfully partnered in the development of 14 North Carolina charter schools since 1999. Additionally, in March 2022 NHA entered into an agreement to assume the management of an existing school in Guilford County, Phoenix Academy. We intend to replicate the model in place at these schools. In total, NHA’s programming is in place across 99 schools in nine states and serves nearly 66,000 students. There are approximately an additional 14,000 students on wait lists. NHA-partner schools in North Carolina consistently perform similarly or above their local resident school districts and closest located schools.

Our belief is that partnering with NHA is in the best interest of the families who will trust us to serve and grow their students. NHA’s network of partner schools has a strong academic record and long-lasting partnerships with local Boards. Consider the following:

- Since 1995 when the first NHA-partner school opened, NHA-partner schools have successfully applied for and been granted renewal of their charters on all but one occasion (Rochester, NY in 2005).
- Research from Stanford University’s Center for Research on Education Outcomes (CREDO) shows that on average students increase their academic performance each year they attend an NHA-partner

school. Specifically, NHA students receive the equivalent of an extra 80 days in math each year and receive an extra 63 days in reading over the same timeframe (CREDO, 2017).

- Similar research by the University of Michigan published in 2018 documented “substantial” benefits for NHA students in math as well as gains in reading that are smaller but still positive for each year a student is enrolled (University of Michigan, 2018).

The CREDO study referenced above builds upon a previous publication studying the impact of charter schools. Overall, NHA was among the top 20 percent of schools surveyed, ranking in the 84th percentile and outperforming more than 80 percent of the other charter school systems identified. CREDO’s study found students enrolled in NHA-partner schools receive a composite of 71 days of extra education each year. As noted throughout our application, this includes an estimated 80 days in math instruction, which we believe will set High Point Prep on a path to meet the needs of the district.<sup>1</sup>

As noted in our proposal, 11 of NHA’s 13 operating partner schools met or exceeded growth in 2018-19 and earned a ‘C’ or above on the state’s accountability system (Summit Creek Academy, a new school opened in 2021-22 in Greensboro). Additionally, seven NHA-partner schools in North Carolina that went through renewal in recent years received 10-year renewals, evidencing the strong success of the NHA model. Consider the following outcomes achieved by NHA-partner schools in 2018-19 (the three years of publicly available accountability data prior to the COVID-19 pandemic’s impact):

- Seven of 13 NHA-partner schools outperformed their local districts in both reading and math.
- Ten NHA-partner schools outperformed their local districts in reading.
- Nine schools outperformed the state average in reading, while eight did so in math.
- All but three NHA-partner schools in North Carolina achieved math and reading proficiencies compared to local districts that were within five percentage points or better.
  - Forsyth Academy serves an at-risk student population much greater than its local district. It outperformed the five nearest located schools in both math and reading, and met growth twice between 2016-17 and 2018-19.
  - Gate City Charter Academy’s serves an at-risk student population much greater than its local district. The school outperformed the five nearest located schools in both math and reading, and met or exceeded growth twice between 2016-17 and 2018-19.
  - PreEminent Charter School serves an at-risk student population significantly greater than its local district. The school outperformed the five nearest located schools in both math and reading, increased its overall accountability score each in each of the past three years with publicly available data (also letter grades in two of three years: ‘D’, ‘C’, ‘C’), and met or exceeded expected growth annually during the same timeframe.

In addition to strong academic outcomes, schools in North Carolina partnering with NHA remain in compliance with all charter, state, and federal requirements. Boards of these schools maintain unqualified independent audits on a regular basis, and oversee budgets that are continuously balanced.

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<sup>1</sup> Charter Management Organizations 2017: <https://credo.stanford.edu/pdfs/CMO%20FINAL.pdf>.

### NHA-Partner Schools Academic Performance

NHA-Partner School	% Minority	2018-19 % Free or Red. Lunch		2018-19 Growth Status	2018-19 Letter Grade	2018-19 Reading Proficiency		2018-19 Math Proficiency	
		Sch.	Dist.			Sch.	Dist.	Sch.	Dist.
Forsyth	91%	82%	60%	Not Met	D	47%	55%	45%	54%
Gate City	95%	70%	62%	Met	D	42%	56%	44%	54%
Greensboro	32%	7%	62%	Exceeded	A	86%	56%	92%	52%
Johnston	37%	24%	46%	Met	C	60%	51%	62%	53%
Matthews	48%	35%	58%	Met	C	61%	54%	61%	64%
Peak	45%	8%	33%	Exceeded	A	84%	65%	80%	65%
PreEminent	99%	77%	33%	Exceeded	C	50%	65%	50%	65%
Queen's Grant	41%	26%	58%	Exceeded	B	67%	54%	69%	64%
Research Triangle	96%	66%	60%	Exceeded	C	51%	48%	49%	47%
Rolesville	31%	24%	33%	Not Met	C	65%	64%	65%	67%
Summerfield	32%	14%	62%	Exceeded	A	83%	56%	87%	52%
Wake Forest	29%	10%	33%	Exceeded	B	76%	65%	81%	65%
Winterville	68%	55%	63%	Exceeded	C	64%	55%	54%	58%

	FRL % (2018-19)	Reading Proficiency (2018-19)	Math Proficiency (2018-19)
<b>Forsyth</b>	82%	47%	45%
5 Closest Schools	58%	38%	41%
<b>Gate City</b>	70%	42%	44%
5 Closest Schools	79%	36%	34%
<b>Greensboro</b>	7%	86%	92%
5 Closest Schools	24%	73%	72%
<b>Johnston</b>	23%	60%	62%
5 Closest Schools	37%	51%	53%
<b>Matthews</b>	35%	61%	61%
5 Closest Schools	31%	68%	76%
<b>Peak</b>	8%	84%	80%
5 Closest Schools	19%	74%	77%
<b>PreEminent</b>	77%	50%	50%
5 Closest Schools	66%	42%	44%
<b>Queen's Grant</b>	26%	67%	69%
5 Closest Schools	38%	61%	69%
<b>Rolesville</b>	22%	65%	65%
5 Closest Schools	28%	67%	67%
<b>Research Triangle</b>	66%	51%	49%
5 Closest Schools	39%	48%	35%
<b>Summerfield</b>	14%	83%	87%
5 Closest Schools	15%	81%	81%
<b>Wake Forest</b>	10%	76%	81%
5 Closest Schools	11%	79%	83%
<b>Winterville</b>	54%	64%	54%
5 Closest Schools	53%	62%	63%



# Appendix A: Evidence of Parent/Community Support

## High Point Preparatory Academy



City of High Point  
North Carolina

Jay W. Wagner  
MAYOR

March 24, 2022

Mr. Dave Machado  
Director, Office of Charter Schools  
North Carolina Department of Public Instruction  
Office of Charter Schools  
6307 Mail Service Center  
Raleigh, NC 27699

Dear Mr. Machado,

I write in my capacity as Mayor of the City of High Point to express my support for a new charter school to be located within the High Point area.

High Point Preparatory Academy is being proposed by a group with ties to the community it would serve. These volunteer leaders have professional experience in a variety of relevant endeavors, such as education, real estate, and community services. I believe this group would be an asset in the governance and oversight of this new community institution.

The need for the school is clear. As you know, while there are charter school choices in Guilford County, there is a demand for more of these high-quality opportunities in High Point.

I also note the experience and record of the founding volunteers' intended management partner, National Heritage Academies. NHA has over 25 years of experience operating charter schools in North Carolina and eight other states – nearly 100 schools, all told. I have learned that separate recent research projects by Stanford University and the University of Michigan have shown measurable benefits to students in these schools, compared with students in neighboring schools.

I thank you for considering my recommendation in this matter and ask you to carefully consider and recommend approval for the High Point Preparatory Academy charter application.

Sincerely,

A handwritten signature in black ink, appearing to read "Jay W. Wagner", is written over a white background.

Jay W. Wagner  
Mayor

To gauge support of a new charter school in High Point, our board chair Dr. Kellie Jackson collected signatures from the community. Over 220 signatures were collected in support of our school.

This petition for a public charter school in High Point will be directly submitted to the North Carolina State Board of Education as evidence of your support for the initiation of the school.

## Petition for a Public Charter School Establishment in High Point (Guilford County) High Point STEM Academy-School of Excellence

*A public charter school is a public school of choice that is authorized by the State Board of Education and operated by independent non-profit boards of directors. State and local tax dollars are the primary funding sources for charter schools, which have open enrollment and cannot discriminate in admissions, or associate with any religion or religious group. Public charter schools cannot charge tuition. Charter schools operate with freedom from many of the regulations that govern district schools, but charter schools are held accountable through the State assessment and accountability system.*

Simply put...charter schools are public schools that provide **FREE EDUCATION TO EVERY STUDENT**, no matter where they live. **A public charter in the heart of High Point will serve as a technology integrated (STEM) establishment geared toward narrowing the academic achievement gap between students of color and their counterparts.**

**We, the undersigned parents, guardians, and community members, support the formation of High Point STEM Academy-School of Excellence in the city of High Point (Guilford County), North Carolina as a public school of choice.**

Signature	Print Full Name	Address	Phone	Email
	Carteria H. Pierce	813 Hopewell Street High Point, 27263	336-887-6673	carteriapierce@yahoo.com
	Blanche E. Robbins	2916 Creekview Court Apt. F High Point 27225	336-848-7218	Robbins6257@yahoo.com
	Willie Mae Goode	201 Randall St. High Point NC 27226	336-884-8480	Willie.M.Goode201@gmail.com
	Sharon Washburn	2931 Median Ct. H.P. 27226	336-307-8839	SWASHsharon@aol.com
	Sharon M. Coyle	3160 Corewood St. H.P. 27226	336-689-2715	COX50324@gmail.com
	Destiny Shaquana Hayes	423-647-0962 1611 Stoneybrook DR.		Destiny.s.hayes@gmail.com
	Valery S. Poole	1611 Stoneybrook DR.	336-905-5365	valery.s.poole@gmail.com
	Lakendra Buffin	2205 Agnus St. High Point NC 27225	336-909-7703	<del>lakendra33@aol.com</del> Lakend33@aol.com
	Tina Sanders	4412 Pennycuik Dr. 27407	336-7988-3641	Tina Sanders 39@yahoo.com
	Daphne Vanderhall	1425 Bailey Circle H.P. NC 27262	336-848-1660	daphnevanderhall@gmail.com
	Mary G. Bates	2428 Tobias Ave. H.P. NC 27263	336-885-8314	
	Peggy McCormick	2958 Grassy Knoll Cir	336-3134224	
	Willie Z. Hayes	2845 Triangle Lake Rd	336-8899010	<del>williezhayes@yahoo.com</del>

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Signature	Print Full Name	Address	Phone	Email
	Picolia Denise Hayes	1716 Waverly Street H.P. N.C.	336 886-4476	picolia1971@yahoo.com
	Dana Benjamin	920 Lakecrest Ave Apt D	336-259-9108	adobrn2010@yahoo.com
	Mary H Wilson	3803 Eagles View Ct. N.P.N.C	(336)862-3001	Wilsonmaryhayes@gmail.com
	Estella McLean	600 Radford St. HP NC	(336)841-4412	NA
	Tiffany Shaw	915 Beesons Field Dr. Kernersville, NC 27284	3368484450	TdHayes4@icloud.com
	Dawn Hayes	2945 Triangle Lake Rd	336-847-9464	dahlhayes2945@yahoo.com
	Montreez Shaw	915 Beesons Field Dr. Kernersville, NC	336-259-9049	Montreez.Shaw@gmail.com
	Geneva Adams-Walk	423 Amberly Drive Jamestown NC	336-887-8868	lexie7@northstate.net
	Bessie McInnis	1707 Gavin Dr High Point NC	3368858908	DOC@AOL.com
	MAE BUTLER	205 Hay St High Point, NC	336-885-6396	mbutler07@hotmail.com
	Sandra Lynne Murray	3411 <del>High</del> Lamplight Way Highpoint	336-21289	
	Keely Crawford	712 Westchester Dr. Apt. I HP	(336) 553-7613	Keelycrawford1984@gmail
	Annie Hayes Riddick	104 Riverwalk Ave Jamestown NC	336 812 9158	ariddick@northstate.net

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**We, the undersigned parents, guardians, and community members, support the formation of High Point STEM Academy-School of Excellence in the city of High Point (Guilford County), North Carolina as a public school of choice.**

Signature	Print Full Name	Address	Phone	Email
<i>Connie G Allen</i>	Connie G Allen			<i>cgallo2@gmail.com</i>
<i>Glen Allen III</i>	Glenwood Allen			<i>galles0302@gmail.com</i>
<i>Deborah Grantee</i>	Deborah Grantee			<i>deb4vols@aol.com</i>
<i>Kathy Cuerden</i>	KATHY CUERDEN			
<i>Richard Fyfe</i>	Richard Fyfe			<i>r.fyfe@outlook.com</i>
<i>George DeVane</i>	George DeVane	<i>1002 Quinlan Dr. Greensboro, NC</i>		<i>gdevaneiii@gmail.com</i>

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Signature	Print Full Name	Address	Phone	Email
<i>Nova Marshall</i>	Nova Marshall	44 Aspen Dr GSO	-	nova.marshall66@gmail
<i>Dorlene Mason</i>	Dorlene Mason	704 Oncl St, HP	336-491-5517	DKmason704@attlock.com
<i>Destiny Floyd</i>	Destiny Floyd	4800 Kingwell Dr, McLeanville	919-109-5833	shatae97@gmail.com
<i>Ron Spencer</i>	Ron Spencer	3208 Crestview DR HPNC	336-858-3656	SpencerRon69@yqhed.com
<i>Tavoris Hunter</i>	Tavoris Hunter	1223 Wheatfield Ct	(336) 404-4663	huntertavoris@gmail.com
<i>Shawn Dandzie</i>	Shawn Dandzie	1005 haddington point DR	336-404-2675	Arcanot51@gmail.com



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Signature	Print Full Name	Address	Phone	Email
<i>Rudy Holmes</i>	Rudy Holmes	4523 Jamesford DR.	336-471-4247	rudylvan1951@gmail.com
<i>Lakeasha Brady</i>	Lakeasha Brady	517 Hartley Hill Ct.	336-471-3100	brady.lakeasha@gmail.com
<i>Kevin Brady</i>	KEVIN BRADY	"	"	"
<i>Cassandra Judicant</i>	Cassandra Judicant	3221 Forestview Dr, HP	336-491-5624	Cassandra3221@gmail.com
<i>Reginald Washington</i>	Reginald Washington	3221 Forestview Dr HP	336-491-4300	washiro6@gmail.com
<i>Virginia C. Mason</i>	Virginia C. Mason	6305 Stonewall Dr. J town	336-454-3915	
<i>Sherman Mason</i>	Sherman Mason	826 Central Ct. High Pt.	336-880-1505	Wmason7@Triad.net
<i>Stephanie G. Mason</i>	Stephanie G. Mason	826 Central Ct. High Point	336-880-7040	ithecweed@triad.net
<i>William S. Lewis</i>	Wm. Stan Lewis	P.O. Box 7332	336-483-6963	
<i>Almeta K. Lewis</i>	Almeta K. Lewis	P.O. Box 7332	336-483-6963	
<i>Deborah Davis</i>	Deborah Davis	3951 Gobbleston Bend Dr. HP	336-471-7152	
<i>Sdney M. Young Jr</i>	Sdney M. Young Jr	3115 Lastview Dr. High Point	336-882-8234	
<i>Rosa Sawyer</i>	Rosa Sawyer	2719 Camilla Lane High Point	336-886-8714	

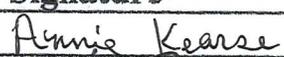
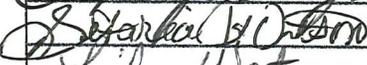
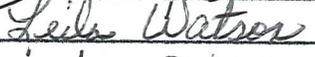
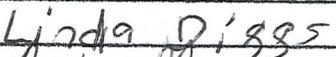
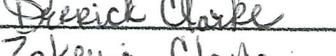
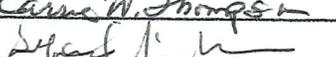
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Signature	Print Full Name	Address	Phone	Email
	Annie L. Kearse	2715-B AnnMoore Circle, H.P.	858-7314	
	Charles Jenkins Jr	5236 H.V Top Rd #103	336-8256092	
	Sotaria J. Watson	" " " "	462-1959	
	Leila J. Watson	1005 Granby Ave H.P.	336-885 0949	
	Linda Riggs	2724 Cannonwood Circle	336-887-6144	
	Brandon Grace	404 Summit Rd. High Point, NC 27263	(336)823-8444	
	R Tucker	2 West End Blvd		
	Catherine Brown	915 Hickory Chapel Rd	336-991-4826	
	Lyndia Clarke	3840 Tonsley Place HP, NC 27265	336-307-8446	lyndiaclarke@gmail.com
	Derrick Clarke	" " " "	336-355-6920	
	Zakeya Clarke	" " " "	336-471-8638	
	Carrie W. Thompson	1916 E. Russell Ave. HP NC 27260	336-587-4405	Carrie.thompson.300@outlook.com
	Sequoia Nicholson	High Point NC 27260	336-781-7839	

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Signature	Print Full Name	Address	Phone	Email
<i>Tammie Mitchell</i>	Tammie Mitchell	120E. Swathmore tre apt 2F	336 858 9605	tammie.mitchell64@yahoo.com
<i>Surade Nichols</i>	Surade Nichols	1005 Granby HP	336-885-0149	
<i>Eric Herndon</i>	Eric Herndon	1117 Monticou Ave PP	336 847-4072	
<i>Verlyn N. Nicholson</i>	Verlyn N. Nicholson	PO BOX 602 HANCOCK	336 840 8503	
<i>Stella Jenkins</i>	Stella Jenkins	4108 Cornerock Dr. CFS	336 327-1515	jenkins.greg@net.net
<i>Yvonne Martin</i>	Yvonne Martin	907 Pine Circle Dr. WNC	442-8222	
<i>Devoyn Littlejohn</i>	Devoyn Littlejohn	701 E. Green Dr. APT 309	336 875-2959	
<i>Rosa L. Bartsch</i>	Rosa L Bartsch	121 Loway Dr	336-870-7784	
<i>Doris Wilson</i>	Doris Wilson	1604 East Commerce AVE	336 803-2447	
<i>Rose Dunlap</i>	Rose Dunlap	213 Windley Street	336-803-4082	
<i>Maggie Burns</i>	M. Burns	504 East Lexington Ave	336-307-4686	
<i>Chas. L. Brown</i>				
<i>Annie Gray</i>	Miss ANNIE GRAY	1420A Beagmhall Loop		
<i>Parthenia Branch</i>		281 Windley St	336-883-4876	
<i>Michael Snow</i>		3221 Wellingford Dr.	336-803-8565	
<i>A. Madrina Lewis</i>	Andie Madrina Lewis	512 Franklin Blvd, GSO, N.C.	336-509-6371	madrinalewis@bellsouth.net
<i>Willie Furlow</i>	Willie FURLOW	701 ELMS High Point	336 781 5351	
<i>Wesley Jackson</i>	WESLEY JACKSON	2909 Morckard	336 759 5337	
<i>Sammy Albright</i>	Sammy Albright	2 Blackhawk CT Browns Summit	703 319 8163	
<i>Valerie Korie</i>	Valerie Korie	2709-C Annmore Circle HNC.	336 896-5564	
<i>Amy Wilkes</i>	Amy Wilkes	2718 Triangle Lake Rd. High Point NC 27260	336-885-4111	amywilkes1@gmail.com
<i>Raymond Wilkes</i>	Raymond Wilkes	2718 Triangle Lake Rd	336-885-4411	r.wilkes1954@gmail.com
<i>Nunnie Wilkes</i>	Nunnie Wilkes	639 Mystic Drive Greensboro NC 27406	336-321-9501	
<i>Chris Johnson</i>	Chris Johnson	589 Pimlico Circle Wiltzett N.C. 27377	907-947-6591	

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Signature	Print Full Name	Address	Phone	Email
<i>Veronica Harris</i>	Veronica Thompson Harris	1040 Montlue Ave. H.P. NC 27262	336-984-5383	v1-thompson71@gmail.com
<i>Beulah Walker</i>	Beulah Walker		336-457-0297	
<i>Camille L. Aksh</i>	Camille L. Aksh		336-521-3144	camilleaksh@yahoo.com
<i>Willie Williams</i>	Willie Williams		599-3270	
<i>Lottie Williams</i>	Lottie Williams	103 Hadley Ln Durham	7713	lottiegwilliams@yahoo.com
<i>Verna Strickland</i>	Verna Strickland	1930 Cedar Dr	336-905-7353	
<i>William Strickland</i>	William Strickland	1930 Cedar Dr	336-905-7353	
<i>LaVerne Thompson</i>	LaVerne Thompson		336-284-4668	
<i>Thomasine Williams</i>	Thomasine Williams	1504 Hampstead Dr.	336-885-6258	thomasinew@gmail.com
<i>Clayton Williams II</i>	Clayton Williams II	↓	336-491-7860	cawilliams@hotmail.com
<i>Clayton Williams Sr.</i>	Clayton Williams Sr	↓	336-848-0557	
<i>Debbie D. Williams</i>	Debbie D. Williams	1007 Granby Ave High Point	336-875-0126	
<i>Nadia Dixon</i>	Nadia Dixon	1007 Granby High Point	336-688-6126	





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Signature	Print Full Name	Address	Phone	Email
Alicia Marshall	Alicia Marshall	700 CHAS Court High Point, NC	336-270-0737	
Bryant James	Bryant James	21791 Triangle Lake Rd.	704-200-2051	
Latoya Norton	Latoya Norton	2714 Triangle Lake Rd	704-201-5580	
Ernestine Gaines	Ernestine Gaines	2708 Triangle Lake Rd		
Ernestine Gaines	Ernestine Gaines	2719 Triangle Lake Rd. HP, NC	336-259-5658	
Ann Dumas	Ann Dumas	208 Paramount Drive H.P, NC	336-907-5170	
Carol Ware	Carol Ware	115 Camden Drive H.P. NC	336-259-5078	
Vanessa Walkes	Vanessa Walkes	530 Ashburn Street H.P. NC	336-847-7257	
Renee Shealy	Renee Shealy	1768 Waverly St High Point	336-688-5049	
Carolyn Katliff	Carolyn Katliff	115 Pershing Street HP, NC	336-882-5644	
Iyana Townsend	Iyana Townsend	901 Camden Drive H.P. NC.	336-884-2159	
Kimberly Copeland	Kimberly Copeland	3016 E Dillon Rd High Point NC	336-887-3307	

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Signature	Print Full Name	Address	Phone	Email
<i>Marcus Townsend</i>	Marcus Townsend	1414 East Green Drive High Point, NC	(336) 942-7119	
<i>Sherry Anthony</i>	Sherry Anthony	1009 South Main St H.P. NC	<del>336</del> 456-3521	
<i>Shirley Little</i>	Shirley Little	713 C Lawndale Dr. Hi P. NC	336-8829230	
<i>Tina Marshall</i>	Tina Marshall	1009 E. Washington St Apt 16	<del>336</del> 847-7846	
<i>Thomas Marshall</i>	Thomas Marshall	1009 E. Washington St Apt A	336-889-3214	
<i>Colleen Patterson</i>	Colleen Patterson	705 Commerce St. Hi P. NC	<del>336</del> 887- <del>4253</del>	
<i>Cynthia Page</i>	Cynthia Page	901 Park Street High Point, NC	336-883-1825	
<i>Dorothy Campbell</i>	Dorothy Campbell	7011 Beach Street - High Point	<del>336</del> 883-8527	
<i>Betra Miller</i>	Betra Miller	507 Franklin Street H.P. NC	<del>336</del> 884-0773	
<i>Mary McLean</i>	Mary McLean	1500 Cardma St - High Point NC	336-886-2899	
<i>Lane Wilkes</i>	Lane Wilkes	530 Radford St.	336-887-4402	
<i>Joann Stone</i>	Joann Stone	811 Macedonia Street High Point NC	<del>336</del> 884-4805	
<i>Randy Shealy</i>	Randy Shealy	<del>1708</del> 1708 Waverly Street H.P.	336-688-5049	
<i>Sarah Graham</i>	Sarah Graham	715 Carolina Street High Point NC	889-3214	
<i>Thomas Capeland</i>	Thomas Capeland	1611 Chatham DR - H.P.	307-9798	
<i>Celeste Love</i>	Celeste Love	915 Forest Street High Point NC	336-255-0810	
<i>Rodney Wilkes</i>	Rodney Wilkes	307 Guyer Street Apt 10 H.P.	336-889-0015	
<i>Terry Miller</i>	Terry Miller	3700 Westfield H.P.	855-5359	
<i>JAMES Linton</i>	JAMES Linton	2005 Cedron H.P.	336 985 9522	
<i>Rosa Wilkes</i>	Rosa Wilkes	2900-A Triangle Lake Rd H.P.	336-883-0158	
<i>Lance Richardson</i>	Lance Richardson	700 Chas Cline H.P. NC	336-7700137	

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Signature	Print Full Name	Address	Phone	Email
	Angela Byers	1112 Carter St High Point, NC	336-699-9289	bbyersangela5@gmail.com
	Willie Byers	1112 Carter St High Point NC	336-491-9278	
	Robin Johnson	1201 Terrell Dr. H.P.	(336)880-1679	
	Gemaine Bullard	1401 Forrest Street H.P. NC	(336)615-0150	
	Raymond Dalky	311 Charles Ave H.P. NC	336-868-9357	
	HENRY HARRIS	714 PARADISE ST	(404)820-6910	
	MARC WHARFF	4102 Chinaberry Ct. E-BORO	336-307-5852	
	Naykia Dickey	411 Moradith St.	336-883-6532	
	Jackie Turner	1045 Springfield Rd.	336-442-4774	Jayt9219@gmail
	Richard Piva	802 S. Elm St	334 991-545	
	Charles Cunningham	1119 E.	336-575-7960	
	Anthony Hudson	1119 E Lexington Ave	336-259-7312	
	Carol Silva	1341 Verdun St W.S.	336 422-3032	



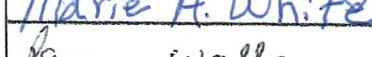
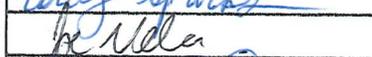
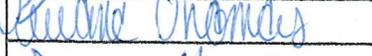
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Signature	Print Full Name	Address	Phone	Email
	CLARENCE KENNEDY	360 Southridge Rd. James Town, NC <sup>27487</sup>	875-4546	
	BRENDA NEALY	3900 Cornish Glen Ct. HP NC	870-2661	
	Celestine Dickens	615 Ashburn Street	88-95306	
	Thomas L. Dickens	615 Ashburn Street	88-95306	
	Eva W. Wesley	525 N. CENTENNIAL	847-4600	
	Marie A. White	" " "	" "	
	James Wall	1986 Norman Grant Rd	7623702	
	Corey Sparks	803 Sevier St	347-444-6609	
	Joe Vela	1399 Hunt Joyce Rd.	818-310-4852	
	Nadine Blake	102 Maryland Dr Thomasville NC	336-803-3376	
	James Rendland	5660 More Dr. Trinity NC	336-887-3362	
	Willie Thomas	3800 Shady Ln Greensboro NC	336-240-1234	
	Jimmy Lee Hayden	2279 Old Hwy 29 Thomasville	336-476-9561	



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Signature	Print Full Name	Address	Phone	Email
	Dr. Jeffrey A. Fricke	137 West Lexington Avenue HP, NC	(336) 335-1987	MyBackDR@gmail.com
	Gina Weathers	1400 Buttonwood Ct. HP NC 27265	(336) 471-9578	gweathers@highpoint.edu
	DAYNE WEATHERS	1400 Buttonwood Ct HP NC 27265	(336) 804-9898	dayneweathers@gmail.com
	Christy Martin	1812 Augusta Dr. Thomasville, NC 27360	(336) 259-8146	Christymartin646@yahoo.com
	Sandra Medley	1708 Franklin Ave.	336-835-8671	Sandra.Medley1@gmail.com
	Lester Kittle	1521 RADFORD ST	336-802-0108	
	Robin Pipkin	3353 Lillie Field Ln.	336-989-8125	rbipipkin@charter
		1108 Anderson St	336-989-6178	NA
	Carlissha Nunez		1616617	
	Debra Jackson	1763-FRANKLIN AV	336-989-2890	
	Chris Gray	1703 FRANKLIN AV	336-848-8334	11
	Danny Jackson	1703 FRANKLIN AV	336-847-6888	11
	Hanny Baldwin	607- Birdwood	336-858-8112	11

