



Organization Information

Organization Name *

Carolina Achieve

Telephone

6503800138

Fax

Address

20 Rountree Lane

Unit/Suite

Zip Code

27503

City

Bahama

State

North Carolina





Primary Contact Name *

john oxaal

Opening Year *

2024

Is Management Organization Used

Yes No

Primary Contact Relation To Board *

Chairman of the Board

Management Organization Name

Board Members Roster *

Management Organization Contact Name

Primary Contact Email *

joxaal@srfunds.com

Management Organization Phone

Primary Contact Phone *

6503800138

Management Organization Email

PrimaryContact Address *

20 Rountree Lane

Unit/Suite *

Zip Code *

27503

City *

Bahama

State *

North Carolina



1. Application Contact Information

Q1. Name of Proposed Charter School

Carolina Achieve

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

Tiffany Alrefae (609 636 8895)

Q3. Geographic County in which charter school will reside

Orange County

Q4. LEA/District Name

680/Orange County Schools

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

27278

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=hejlsish9e17BC8rRkMVLthGg%3d%3d&ptid=amIgtZiB9plushNjl6WXhfiOQ%3d%3d&secid=lyc2NIZPsdzgEk6V6aj45g%3d%3d&PG=6&IRP=0) (<https://simbli.eboardsolutions.com/Policy/ViewPolicy.aspx?S=10399&revid=hejlsish9e17BC8rRkMVLthGg%3d%3d&ptid=amIgtZiB9plushNjl6WXhfiOQ%3d%3d&secid=lyc2NIZPsdzgEk6V6aj45g%3d%3d&PG=6&IRP=0>)?

- Yes
- No

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

Tom Miller - Leaders Building Leaders

Acadia Northstar - Kathy Davies - Budgetary

Media Integrations - Bob Bedi - Marketing

Olivia at Emerge Consulting - IT Infrastructure

Steve Griffin - Insurance

Hubrich Construction - Facility

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



Leaders Building Leaders - \$7,500

Media Integrations - \$3,000

None of these fees are reflected in the budget. Instead they were paid out of Carolina Achieve's start-up funds.

After Carolina Achieve begins operations Media Integrations will support us with ongoing marketing activities directed towards student and faculty recruitment and raising the profile of the school to the donor population. The first year's budget for this effort is \$30,000.

Carolina Achieve will use Acadia Northstar for ongoing activities related to budgets, accounting and Power School. The cost for both activities is approximately \$140/student in the ADM per year.

Carolina Achieve has received valuable advice from Insurancepeople and Emerge Consulting directed towards the understanding of our insurance needs and handling our IT infrastructure. Carolina Achieve will spend money on these efforts but we have not chosen the vendors yet.

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:

The application has been written entirely by Carolina Achieve staff and board members.

Leaders Building Leaders has helped with reviewing and commenting on the application and insuring that it is high-quality, compliant and mission and research based. While there is no requirement, we will likely use LBL for board development work in the future.

Media Integrations has helped develop our marketing materials and questionnaires for market research purposes. We have surveyed parents and stakeholders. Media Integrations also helped with branding as well as adding to our web site. They have also helped us in community outreach. We will continue to use Media Integrations to help with marketing activities especially student recruitment and community engagement once school starts.

Acadia Northstar has helped us understand budgets for charter schools, reimbursements from various governmental entities, and staff salary levels. We will continue to use Acadia Northstar for financial, student and staff reporting once school starts.

Hubrich Contracting has helped us to understand our options for both temporary and permanent locations, the statutes that govern school development and the financing of public charter schools. Subject to the negotiation of a satisfactory contract, we will use Hubrich to build our permanent school.

Q10. Projected School Opening Month

August 2024

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

- Yes (Year-Round)
- No

Applicant Comments :

During the 2024 school year, Carolina Achieve will not operate as a year-round school. There are pluses and minuses to year-round schooling, however, therefore, Carolina Achieve may decide at a later date to operate as a year-round school. The school will exceed the minimum of 1,025 instructional hours.

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

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Applicant Comments :

Academic School Year	Grade Levels	Total Projected Student Enrollment
Year 1	k,1,2,3,4,5	400
Year 2	k,1,2,3,4,5,6	500
Year 3	k,1,2,3,4,5,6,7	600
Year 4	k,1,2,3,4,5,6,7,8	700
Year 5	k,1,2,3,4,5,6,7,8	800

Resources



Enrollment Summary Table.xlsx

Applicant Evidence :



Enrollment Summary Table (2...

Uploaded on **4/3/2023** by **john oxaal**

Q13. **At full capacity, what is your estimated student enrollment and grade spans?**

900 Students in grades K-8

Q14. **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 :

Orange and Durham Counties have significantly different demographics. The demographics presented here do not reflect that of any of the counties but instead, a mixture of the two.

Ethnicity/Race	# of Students	Percentage (%)
American Indian or Alaska Native	0	0%
Asian	30	3%
Black or African American	270	30%
Hispanic	150	17%
Native HI or Pacific Islander	0	0%
Two or More Races	30	3%
White	420	47%
EDS Subgroups	259	29%
Economically Disadvantaged Students	117	13%
Students with Disabilities	90	10%
English Language Learners	50	6%
Students Experiencing Homelessness	2	<1%

Resources



Enrollment Demographics Tab...

Applicant Evidence :



Carolina Achieve Enrollment ...

Uploaded on **4/27/2023** by

Tiffany Alrefae

Q15. Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan outlined above.



Carolina Achieve is looking to attract students from the Western Triangle area with a majority of them residing in Orange and Durham Counties and a small number residing in Alamance, Person, Wake, and Chatham Counties. This area has seen a housing and employment boom over the last ten years that does not appear to be slowing down, as CNBC ranks North Carolina as America's Top State for Business in 2022. The announcement says that "the state's credit rating is pristine; its fiscal balance is sound. Economic growth, at 6.7% last year, and job growth at 3.6% were among the strongest in the nation, according to government statistics." This boom has also increased the number of students in the area and the need for increased access to high-quality schools that prepare students for college and the careers of their choice.

Carolina Achieve is committed to being part of the state and county's solution to provide access to high-quality education for every child. Based on the waitlist numbers at area charter schools, the growing population of Orange and Durham Counties, the overcrowding of schools in Orange and Durham counties, and the redistricting of public schools in Orange and Durham Counties, Carolina Achieve has decided to serve students in grades K - 5 in year one. The biggest need comes from the almost 800 students who applied to The Expedition School and 1800 students who applied to Woods Charter (information based on data directly from the schools). Parents in Orange and Durham County have indicated during information sessions and on the community survey that they want to see additional school choice options to ensure that every child has the ability to a high-quality school that meets their individual needs and prepares them for college and career (see question 15 for more detail).

The school will open with 400 students in kindergarten through fifth grade. The goal is to have 100 students in kindergarten and first grade because of the natural entry point for enrollment and then have 50 students in second through fifth grades to allow for siblings to also attend the school. Families that Carolina Achieve has spoken with have indicated that they prefer to have all of their children at one school. Many of them have children that attend local charter schools, but their younger children were unable to matriculate to the older sibling's school due to the extremely high turnout for lottery participation and then the waitlists.

The school will add one grade per year until it is K - 8th grade in year four. The school will also add 100 students per year in kindergarten until it is 100 students per grade K - 8th grade for a total of 900 students.

There are four major reasons to support Carolina Achieve's enrollment projection: overcrowding at local elementary and middle schools, low proficiency rates for students from groups that have been historically and persistently marginalized and excluded, an increase in population due to families moving to the area, and waitlists at local charter schools. (See attached feasibility study)

Overcrowding at Local Elementary and Middle Schools

Overcrowding is a significant issue in many local schools in Orange and Durham Counties. Many classrooms are filled beyond their intended capacity. This can negatively impact the quality of education, as teachers may not have enough time to give individual attention to students or have access to enough resources to provide a well-rounded curriculum. The local school districts are trying to help solve this problem as well as make the current schools more inclusive by redistricting, but this will cause thousands of students to need to transfer schools after starting kindergarten at their assigned schools. As a result, families are likely to look for alternative options, such as a new school, that can provide a better learning environment for their children.

Below are examples from the North Carolina Department of Public Instruction for the 2020-2021 school year:

School	County	Rating	Capacity	Enrollment
Efland Cheeks	Orange	C	502	561
River Park	Orange	D	455	522
Creekside	Durham	D	686	782
Hope Valley Elementary	Durham	D	575	602

While both counties are working to address this issue, they cannot build schools or redistrict areas fast enough to address the increase in population. The goal of redistricting is to increase equity and access, while also redistributing enrollment throughout the county. However, redistricting will also cause unrest for students and families, as over 2000 students will need to leave their current school to



attend one in another neighborhood. When parents have the option of choosing between crowded classrooms with limited individual focus on their children, or a school with a more personalized teaching approach and a robust well-being program, the choice is self-evident. (See Orange County Capacity and Long Range Report attachments)

Low Proficiency Rates

Students who belong to groups that have been historically and persistently marginalized and excluded are currently not meeting proficiency standards set forth by the state board of education for mathematics, reading, and science in grades K-8 based on the Local Educational Agency’s state report card for Orange County, Chapel Hill-Carrboro, and Durham County. These groups include Black students, Hispanic students, students who identify as two or more races, economically disadvantaged students, English learners, and students with disabilities.

The proficiency numbers found on the Local Educational Agencies of Orange, Chapel Hill-Carrboro, and Durham County’s state report cards for the students who identify as being in one of the groups listed above, report that less than 20% of them are considered to be “College and Career Ready” by the state. Students are “College and Career Ready” if they earn a 4 or 5 on the end-of-grade or end-of-course exam by demonstrating a thorough understanding of grade-level standards.

Based on conversations with families who have students that identify with at least one of these groups, they want an additional school choice option for their children. They have indicated that they are more likely to sign up for a charter school lottery or apply for financial aid at a local private school because they feel that their children’s needs are not being met in their current schools, as indicated by the low proficiency rates. They know that as the local population continues to increase there will be fewer options for their children to enroll at both charter and private schools. (see Appendix A)

LEA	Orange County		Durham County	
	Not Proficient	Grade-Level Proficient, but not College and Career Ready	Not Proficient	Grade-Level Proficient, but not College and Career Ready
2021 - 2022 Proficiency Levels				
Mathematics (EOG 3 - 8)	54%	15%	59%	17%
White	38%	16%	23%	17%
Black	73%	14%	70%	17%
Hispanic	72%	14%	67%	17%
Two or more races	57%	18%	54%	12%



Economically Disadvantaged	72%	13%	72%	16%
English learners	87%	9%	81%	12%
Students with Disabilities	88%	6%	83%	10%
Reading (EOG 3 - 8)	57%	15%	58%	17 %
White	41%	17%	21%	16%
Black	74%	13%	66%	18%
Hispanic	77%	12%	70%	15%
Two or more races	55%	14%	46%	17%
Economically Disadvantaged	77%	11%	72%	16%
English Learners	94%	-	88%	9%
Students with Disabilities	89%	6%	84%	9%
Science (EOG 5 & 8)	39%	9%	36 %	12 %
White	23%	9%	10%	6%
Black	56%	9%	43%	14%
Hispanic	48%	11%	43%	13%
Two or more races	37%	-	29%	11%
Economically Disadvantaged	52%	11%	46%	13%
English learners	69%	11%	64%	13%



Students with Disabilities	79%	7%	70%	10%
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Population Increase

Orange County and Hillsborough, NC, have experienced significant population growth in recent years. North Carolina continues to attract families to the area due to job opportunities, a lower cost of living, and a better quality of life. According to the U.S. Census Bureau, the population of Orange County, NC, increased by 10.9% between 2010 and 2020, reaching a total population of 149,860. The town of Hillsborough, which is located in Orange County, also experienced a population growth rate of 13.6% during this same period, reaching a total population of 7,560. During the next ten years, both Orange and Durham Counties are going to continue to grow. With Orange seeing a 13.5% increase and Durham seeing an 8.3% increase. This significant population growth has led to an increase in the number of school-aged children in the area, placing a strain on existing schools' resources. While Carolina Achieve will not solve this problem entirely, it will be a key part of the solution for both counties, where there are also extensive waiting lists for existing charter schools.

Waiting Lists at Local Charter Schools

According to the North Carolina Department of Public Instruction's latest available data for the 2021-2022 school year, there were over 7,500 students on charter school waiting lists in Durham County, NC, and over 1,800 students on charter school waiting lists in Orange County, NC. Currently, almost 800 students have applied to The Expedition School for less than 10 vacant enrollments and 1800 students have applied for less than 30 vacant enrollments in Kindergarten at Woods Charter. While most charter schools have designated sibling preference in their lottery, many schools cannot honor sibling preference due to the high number of siblings that apply to the school each year. Few if any of these students are taken off the waiting list and matriculate to the school. Instead, they must enter the lottery again the next year and hope that a spot opens up in their grade level.

Based on these numbers and discussions with local parents, charter schools have become a highly sought-after alternative to traditional public schools that are over-enrolled or not meeting the needs of their students; as well as costly private schools where the tuition is far above what middle and economically disadvantaged families can afford to pay for their children. Conversations with these parents in information sessions and through survey data have shown that these parents are frustrated with their limited options and want a school that will prepare their children for both college and career (see Appendix A).

<https://www.dailytarheel.com/article/2023/02/city-ocs-boe-0206> (<https://www.dailytarheel.com/article/2023/02/city-ocs-boe-0206>)

<https://www.orangecountyfirst.com/Page/162> (<https://www.orangecountyfirst.com/Page/162>) (4th paragraph - School transfers)

Applicant Evidence :

		
OrangeCountyCapacity.pdf	Long Range Report .Final 5.22....	CA - Enrollment Feasibility An...
Uploaded on 4/23/2023 by Tiffany Alrefae	Uploaded on 4/23/2023 by Tiffany Alrefae	Uploaded on 4/27/2023 by Tiffany Alrefae

Q16. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- I certify
- I do not certify



Q17.Explanation (optional)

N/A



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.

Q18. Organization Type

- Non-Profit Corporation
- Municipality

Q19. Official name of the private, non-profit corporation as registered with the NC Secretary of State

- This is the entity that will hold the Charter if final approval is granted by the NC State Board of Education.

Carolina Achieve, Inc

Applicant Comments :

Also see Question 37 for NC articles of incorporation and amendment to the Articles to change name to Carolina Achieve.

Q20. Has the organization applied for 501(c)(3) non-profit status?

- Yes
- No

Q21. 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

Applicant Comments :

The 501(c)(3) 1023 application for tax-exempt status was filed in early February of 2023. We have not received a notice yet. The IRS estimated a 6-month turn time on the 1023 application.

Q22. Attach as Appendix F Federal Documentation of Tax-Exempt Status

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

Applicant Evidence :


Appendix F_ Federal Documen...

Uploaded on **4/19/2023** by

Lauren Watters

Q23. Name of Registered Agent and Address

- As listed with the NC Secretary of State



John Oxaal

20 Rountree Lane

Bahama, NC 27503

Q24. Federal Tax ID

88-2052006

Applicant Comments :

88-2052006



3. Acceleration

Per NC Administrative Code 16 NCAC 06G .0509 (<https://simbli.eboardsolutions.com/Policy/ViewPolicy.aspx?S=10399&revid=84R1LVelxY9lvhpKdhHt1w==&ptid=muNUIKiR2jsXcslsh28jpBkiw==&secid=x9VPtMUo9twbb6Q1kKyM7A==&PG=6&IRP=0>), the State Board of Education, in its discretion, may accelerate the mandatory planning year to increase the number of high-quality charter schools.

Q25. Requirements

The State Board of Education may accelerate the mandatory planning year for a charter applicant that meets the following requirements:

- (1) agrees to participate in the planning year while the charter application is being reviewed without any guarantee of charter award; and
- (2) demonstrates that there is a facility identified by the applicant that is feasible for opening on an accelerated schedule. Do you want your application to be considered for acceleration?

Yes

No

Q26. Does your board agree to participate in the planning year while the charter application is being reviewed without any guarantee of charter award?

Yes

No

Q27. Is a facility identified by the applicant that is feasible for opening on an accelerated schedule?

Yes

No

Q28. Demonstrate in narrative form, that the facility identified by the applicant is feasible for opening on an accelerated schedule.



Hubrich Construction has purchased an 80-acre parcel on Lawrence Road in Eastern Orange Co. near the Durham Co line. This parcel will have on it: West Triangle High School (a replicate of Research Triangle High School) whose charter has been approved, Carolina Achieve, and approximately 40 acres of land for recreational activities. A preliminary site plan is attached. Traffic studies have been completed. Utility connections to the parcel have been approved. In May 2023, final approval from the Orange County Commissioners is expected. The construction of the High School will begin in the summer of 2023. The occupation date will be July 2024. The master plan for this site is attached below.

Carolina Achieve has two viable options for its facility. The first alternative is West Triangle High School. The High School building will not be fully occupied for the first two years. Carolina Achieve is in discussions with WTHS to occupy the first floor of the High School Building for its first two years of operation (see WTHS mentor letter). It has 36,000 sq. ft. of educational space plus an attached gymnasium and cafeteria. The 36,000 sq ft would be enough to hold the targeted census of 500 students in year two of our operation.

The second alternative is opening in August of 2024 in modular structures located on the same Lawrence Road property. We have evaluated, with Hubrich, the cost of the site preparation, the available financing, the rent, and the set-up/tear-down cost of the modular structures. We have evaluated these costs against our target budget and against a budget that has a student census that is 25% lower. We are able to break even in both cases.

Given the current state of the municipal bond market for charter schools, Carolina Achieve has been advised that it can raise money for its permanent home on the property in the spring of 2025. This would give Hubrich time to build Carolina Achieve's permanent home by the beginning of the 2026 school year.

A letter from Hubrich Construction to Ashley Baquero at the NC Office of Charter Schools that supports Carolina Achieve is attached, below.

Applicant Evidence :

20230325_173948.PDF

Uploaded on **3/25/2023** by **john oxaal**

Carolina AchieveMaster Plan ...

Uploaded on **3/9/2023** by **john oxaal**

WTHS - Carolina Achieve Lette...

Uploaded on **4/27/2023** by **Tiffany Alrefae**

Q29. Attach as Appendix A1 Acceleration Evidences to demonstrate that you have a facility secured for opening on an accelerated schedule.

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

Applicant Evidence :

Appendix A1 Final.pdf

Uploaded on **4/19/2023** by **Lauren Watters**

Q30. The State Board shall also consider the presence or absence of evidence of the following eight (8) factors in making its determination of whether to accelerate a planning year: (1) whether the mission and educational program outlined in the nonprofit board's application will provide parents and students with different educational opportunities than are currently available in the area;

- (2) whether local, state, or national nonprofit partnerships have committed to assisting the school;**
- (3) whether the school will contribute to potential for economic and educational development of the region;**
- (4) whether an organization that has experience in creating public schools is mentoring the applicant;**
- (5) whether obstacles to educational reform efforts leave chartering as an available option;**
- (6) whether an existing charter school board has agreed to mentor the applicant;**
- (7) whether the nonprofit corporation has existed for more than two years; and**



(8) whether the proposed board has previously operated or currently operates a public charter school. Please confirm that you understand the above accelerated factors.

- Yes
- No

Q31.Factor (1) Describe your school's unique mission and educational program.



Carolina Achieve will be one of the first new charter schools in the West Triangle area that is built around the lessons learned since the pandemic began. Schools today must provide all students with a rigorous, relevant, and reflective educational experience in order to prepare them to achieve their scholastic, personal, and professional goals. They need access to a rigorous academic curriculum that enables them to both build a strong foundation of content and skills, as well as the ability to apply their knowledge and skills to new situations. With access to information at the tips of every student's fingers, schools can no longer expect them to remain engaged or empowered to learn through traditional methods. The instructional program must increase student agency, which is learning through activities that are meaningful and relevant to learners, driven by their interests, and often self-initiated with appropriate guidance from teachers. Essentially this way of learning gives students both a voice and to some extent a choice in how and what they learn. In order for student agency to be effective, it must be paired with reflection. Reflection supports a growth mindset and encourages students to improve and learn from their mistakes by failing forward. To ensure that students receive a rigorous, relevant, and reflective educational program, Carolina Achieve will introduce students and families in the West Triangle to a new type of K - 8 school, one that is learner-centered and competency-based. This inclusive school will prepare every student for the college and career of their choice by ensuring that they are grounded and nourished through the school's Four Roots.

Carolina Achieve's instructional program is designed around its Four Roots: a strong academic foundation, Habits of Success (entrepreneurial skills, mindsets, and behaviors), well-being, and the Home-School Partnership. Out of these roots will be the strong trunk focused on a learner-centered and competency-based education, which connects and feeds every branch of program, policy, practice, and procedure at the school. Carolina Achieve believes in the shift to a student or learner-centered paradigm because it ensures that all students receive a high-quality education in order to unlock their full potential to thrive and contribute to the world around them (see attachments). To this end, Carolina Achieve's instructional program will focus on the whole child, equitable access, relevance, social and emotional learning, connection to the community, student agency, and customization through competency-based education.

In order to supplement and support teachers in creating a learner-centered and competency-based school, four foundational texts will be used for professional development and learning, as well as resources to ensure that all programs, practices, policies, and procedures are aligned with the school's mission, vision, and values. These texts are:

- *Evolving Education: A Switch to a Learner-Centered Paradigm* by Katie Martin
- *The New Classroom Instruction that Works* by Bryan Goodwin and Kristen Rouleau
- *Culturize: Every Student, Every Day Whatever it Takes* by Jimmy Casas
- *Deeper Competency-Based Learning: Making Equitable, Student-Centered Sustainable Shifts* by Karin Hess, Rose Colby, and Daniel Joseph

The school will use *New Classrooms* and *Transcend's Out of the Box Report's 10 Leaps for 21st Century Learning* as a framework to design a school that ensures all students are prepared to achieve their scholastic, personal, and professional goals (see attachment). *New Classrooms* (<https://www.newclassrooms.org/I/409842/2022-10-10/cgnn5g>) is in the innovative learning model development space while *Transcend* (<https://www.newclassrooms.org/I/409842/2022-10-10/cgnn5r>) supports school communities and model providers to develop and spread innovative learning environments more broadly. *Out of the Box* provides a roadmap for school communities, advocates, philanthropists, federal and state policymakers, and others who are ready to move beyond the box and chart a new course for what schooling can be. Carolina Achieve will utilize the 10 Leaps for 21st Century Learning as the framework for its four "roots": strong academic foundation, Habits of Success (entrepreneurial skills, mindsets, and behaviors), well-being, and the Home-School Partnership. Carolina Achieve's design will directly align the school to the initiatives outlined in NCDPI's Operation Polaris 2.0 - literacy, student support services, accountability and testing, competency-based education, human capital, and myFutureNC's Call to Action Report - academic expectations P - 12, seamless transitions between grade levels, ensuring access to a high-quality learning environment for every student at every level, adopting a rigorous standards-aligned culturally relevant curriculum, and coordinate student support systems. By aligning the school to these initiatives all students will be prepared to take advantage of the opportunities that will enable them to achieve their scholastic, personal, and professional goals.

Root 1: Strong Academic Foundation

All students, regardless of identity, background, belief, neurodiversity, or ability, deserve a rigorous and relevant academic program that prepares them to achieve their scholastic, personal, and professional goals. It requires that students first build foundational skills in



literacy, mathematics, science, and social studies and then are able to apply those skills and transfer their knowledge to new contexts and situations. In order to accomplish these goals, the school must focus on whole-child development and learner-centered best practices. They will help to increase student engagement, agency, and well-being, as well as complement the Habits of Success.

Root 2: Habits of Success (Entrepreneurial skills, mindsets, and behaviors)

Mastering the Habits of Success, also known as entrepreneurial skills, mindsets, and behaviors, prepares students to thrive in today's ever-changing world by navigating ambiguity and exerting agency over their own learning.

The Habits of Success are:

- purposeful learning and connections
- teamwork and collaboration
- resilience
- accountability
- critical and creative thinking
- empathy.

These habits will be woven into every aspect of the school. The school will create a framework that maps each of the habits with developmentally appropriate skills, mindsets, and behaviors. The students and teachers will then use this framework to measure student progress toward mastery. Carolina Achieve will partner with Uncharted Learning, a national leader in K-12 entrepreneurial education, to ensure that students are prepared through the acquisition of not just content knowledge, but also the skills and mindset they need to work collaboratively, solve problems they care about, and handle upheaval. Carolina Achieve will be the first school in North Carolina to adopt Uncharted Learning's entrepreneurial curriculum and teacher professional development program. The professional development program allows teachers to seamlessly integrate the Habits of Success throughout all courses and units of study, as well as the school's interconnected advisory system.

Root 3: Well-being

Carolina Achieve will have an interconnected advisory system, called the Student Success System, which will be the foundation for well-being, which leads to student success inside and outside of the classroom. While similar programs are utilized at independent schools in the area, they are not currently utilized to this extent in traditional public or charter schools in Orange or Durham County. This program takes the traditional homeroom teacher model to the next level. Every teacher becomes a Success Coach and meets with their group of 12 - 15 students 2 - 3 times daily. They support students' individual academic and personal growth and achievement journeys. Success Coaches, students, and caregivers will form the core of the school's Home-School Partnership. A key factor in student academic success and personal growth is the relationship between their home and the school. Success Coaches will be the first point of contact for families, regarding information about their child and the school. This type of advisory program helps every student, especially those from historically and persistently marginalized and excluded groups, to feel seen, known, and heard. The small group of students assigned to one coach will be called the Student Success Team and they have the following goals:

- Develop relationships
- Build healthy practices
- Establish school norms, patterns, and culture
- Support executive function, reflection practices, and metacognition
- Matriculation commitment to growth and achievement.

Root 4: Home-School Partnership

Family involvement is an important factor in student success and well-being inside and outside of school. Carolina Achieve will prioritize building trust and relationships with all students and their family members or guardians. This process begins during student recruitment and then is solidified through the Student Success System between the student, their family, and their Success Coach. The partnership helps ensure students have the support they need to learn and grow academically, socially, and emotionally.



Communication -

Open and regular communication between teachers and parents is essential for building a strong home-school partnership. Teachers can communicate with parents through newsletters, emails, parent-teacher conferences, and other means. Parents can also communicate with teachers through emails, phone calls, or scheduled meetings.

Parent Involvement -

Encouraging parents to get involved in their child’s education can help build a strong home-school partnership. Parents can be involved in school events, volunteer in the classroom, or assist with homework and learning at home.

Sharing Information -

Teachers can share information about the curriculum, classroom activities, and student progress with parents. Parents can also share information about their child’s interests, strengths, and challenges with teachers.

Supporting Learning at Home -

Providing parents with resources and strategies to support learning at home can help build a strong home-school partnership. Teachers can provide parents with ideas for activities that support classroom learning, such as reading with their child, practicing math skills, or conducting science experiments.

Celebrating Achievements -

Celebrating student achievements can help build a positive home-school partnership. Teachers can acknowledge student achievements in class and communicate them to parents. Parents can also celebrate their child’s achievements at home and share them with teachers.

Resolving Conflicts -

Conflicts between parents and teachers can arise, and it’s essential to address them promptly and respectfully. Teachers can listen to concerns and work with parents to find solutions. Parents can also communicate their concerns respectfully and work with teachers to find solutions.

By implementing these strategies, the school and the parents can build a strong partnership that supports student success. The partnership can help ensure students have the support they need to achieve their scholastic, personal, and professional goals.

Applicant Evidence :


10Leaps.pdf

Uploaded on **4/27/2023** by
Tiffany Alrefae


IndustrialvsStudent.pdf

Uploaded on **4/27/2023** by
Tiffany Alrefae

Q32.Factor (2) Describe any local, state or national nonprofit partnerships that have committed to assisting the school.



Building 21

Building 21 is a nonprofit organization that reimagines education to meet the needs of all learners. They support schools and districts to create more personalized learning pathways by nurturing relationships, encouraging passions, and rethinking assessment.

Carolina Achieve will be using Building 21's Competencies and Continua for students, teachers, and leaders. The school will partner with them for professional development, mentoring, and planning.

District C

Work is changing. Automation is impacting jobs across all industries. Employers are looking for a new kind of talent prepared for the uniquely human job description of the modern economy: work in diverse teams to solve complex problems. Preparing the next generation is the education challenge of our time. This is the work of District C.

District C will be helping Carolina Achieve students and faculty connect their Habits of Success (see section 8.1 - Mission and Vision) to real-world challenges through a partnership with local businesses and organizations.

New Leaders

New Leaders is an American non-profit organization that aims to recruit and train school leaders who focus on improving education results for poor and minority students. It also aims to promote system-level policies and practices that provide support to these leaders.

The Founding Head of School, Tiffany Alrefae is a 2023 - 2024 cohort member in the New Leaders: Exploring New School Models Fellowship. Her fellowship includes mentorship by leaders from high-performing schools across the United States, school visits, and workshops with Stanford's d.school and UnboundEd.

Uncharted Learning

The jobs of the future are unknown, so it's more important than ever to teach students the critical skills and behaviors of entrepreneurs. We provide schools with a comprehensive curriculum, teacher training, and support services to help students develop adaptable, real-world skills.

Applicant Evidence :

			
Letter for Carolina Achieve fro...	General Letter of Support - Ca...	Carolina Achieve Letter of Rec...	Carolina Achieve.pdf
Uploaded on 4/27/2023 by Tiffany Alrefae	Uploaded on 4/22/2023 by Tiffany Alrefae	Uploaded on 4/26/2023 by Tiffany Alrefae	Uploaded on 4/13/2023 by Tiffany Alrefae

Q33.Factor (3) Describe how the school will contribute to the potential for economic and educational development of the region.



Carolina Achieve will contribute to the potential for economic and educational development in the region in two ways: successfully preparing students for college and career and by becoming a center for teaching and learning.

Preparation for College and Career

Successful college and career preparation is necessary if students want to take advantage of all of the academic and professional opportunities in North Carolina, as well as ensure that they prosperous future. These opportunities require that students have a strong academic foundation and have mastered durable skills.

America Succeeds, a national nonprofit organization committed to engaging business leaders in accelerating equity, access, and opportunity in education and partnering with the North Carolina Department of Public Instruction, says that, "Durable Skills include a combination of how you use what you know – skills like critical thinking, communication, collaboration, and creativity – as well as character skills like fortitude, growth mindset, and leadership...Learning how employers request skills can help education providers better serve all types of learners, whether they are high schoolers, postsecondary students, job seekers, or employees in need of training." (See Hillsborough/Orange County Chamber of Commerce Letter of Support)

Carolina Achieve's school design will directly align the school to the initiatives outlined in NCDPI's Operation Polaris 2.0 - literacy, student support services, accountability and testing, competency-based education, human capital, and myFutureNC's Call to Action Report - academic expectations P - 12, seamless transitions between grade levels, ensuring access to a high-quality learning environment for every student at every level, adopting a rigorous standards-aligned culturally relevant curriculum, and coordinate student support systems. Alignment happens through embedding the school's Habits of Success (entrepreneurial skills, mindsets, and behaviors/durable skills - see section 8.1) into every aspect of school life, so that students are not just learning the Habits of Success, but are more importantly able to apply them to new and different situations throughout their life. The school is partnering with Uncharted Learning, a national leader in entrepreneurial education, and District C, a leader in connecting students to real-world experiences, in order to ensure that faculty are supported in helping students learn the Habits of Success. By aligning the school to these initiatives all students will be prepared to take advantage of the opportunities that will enable them to achieve their scholastic, personal, and professional goals.

Center for Teaching and Learning

Carolina Achieve will also become a center for teaching and learning. By partnering with local schools, colleges, universities, and businesses, Carolina Achieve will operate like a teaching hospital. Teachers will come to the school to learn, train, and collaborate. The school will host various workshops and conferences for teachers and aspiring teachers that enable them to better meet their students' needs, as well as continue to grow professionally. The goal will be to create a center to develop and scale best practices across both the public and private education landscape and all schools and students in North Carolina benefit. Carolina Achieve is already working to establish relationships in the community to fulfill this commitment. (See Appendix A)

Applicant Evidence :


charter school application sup...

Uploaded on **4/22/2023** by
Tiffany Alrefae

Q34.Factor (4) Describe whether an organization that has experience in creating public schools is mentoring the applicant.



Alamance Community School

Leslie Paynter, Managing Director of Alamance Community School, has agreed to mentor Tiffany Alrefae, Carolina Achieve's Founding Heading of School. Ms. Paynter has been a founding member of Voyager Academy and Alamance Community School. She will be providing Ms. Alrefae support in all aspects of the lead administrator's responsibilities and opportunities. Ms. Alrefae will periodically visit Alamance Community School to observe the duties of the lead administrator, curriculum development, community outreach, and school operations.

Bridge Prep Charter School (NY)

Fahron Ebanks, Director of Operations at Bridge Prep Charter School (NY), has agreed to mentor Tiffany Alrefae, Carolina Achieve's Founding Head of School. Ms. Ebanks has extensive experience as a special education teacher and administrator and was on the founding team for Bridge Prep. She will be providing Ms. Alrefae support in all areas regarding Carolina Achieve's Exceptional Children's program. Ms. Alrefae will periodically visit Bridge Prep Charter School to observe the academic program and operations regarding special education.

New Leaders

New Leaders is an American non-profit organization that aims to recruit and train school leaders who focus on improving education results for poor and minority students. It also aims to promote system-level policies and practices that provide support to these leaders.

The Founding Head of School, Tiffany Alrefae is a 2023 - 2024 cohort member in the New Leaders: Exploring New School Models Fellowship. Her fellowship includes mentorship by leaders from high-performing schools across the United States, school visits, and workshops with Stanford's d.school and UnboundEd.

Applicant Evidence :

		
Letter of Support Bridge Prep....	General Letter of Support - Ca...	Carolina Achieve Mentor Lett...
Uploaded on 4/26/2023 by Tiffany Alrefae	Uploaded on 4/22/2023 by Tiffany Alrefae	Uploaded on 4/13/2023 by Tiffany Alrefae

Q35.Factor (5) Describe any obstacles to educational reform efforts that leave chartering as an available option.

Change happens very slowly in traditional public schools because of the size, extensive systems, and multi-layered approval processes. While there is much support from NCDPI and other statewide organizations to shift schools and learning from the industrial paradigm to the learner-centered paradigm, change can only happen so quickly across larger public school systems (see attachment). Change happening at this glacial pace is creating an obstacle to true educational reform. Charter schools were created to be incubators of innovation and best practices that can be transferred to other schools. The industrial paradigm that most schools operate on uses sorts and ranks students to fit into specific roles, instead of unlocking the potential for all students to thrive and contribute to their communities. While the student or learner-centered paradigm ensures that all students deserve a high-quality education in order to unlock their full potential to thrive and contribute to the world around them. This new paradigm focuses on the whole child, equitable access, relevance, social and emotional learning, connection to the community, student agency, and customization through competency-based education. Carolina Achieve will partner with NCDPI and other statewide organizations to expedite their plans to make learning more student-centered by focusing on competency-based education and the entrepreneurial skills, mindsets, and behaviors that better prepare students for college and careers. The founding head of school has already been in discussion with members of NCDPI, including Assistant State Superintendent Andrew Smith, since September 2022, about Carolina Achieve aligning to and participating in the initiatives in Operation Polaris 2.0., such as its competency-based learning pilot .



Applicant Evidence :


IndustrialvsStudent.pdf

Uploaded on **4/27/2023** by
Tiffany Alrefae

Q36. Factor (6) Describe whether an existing charter school board has agreed to mentor the applicant.

The West Triangle High School board of directors has agreed to mentor the Carolina Achieve board. They will provide the Carolina Achieve board with opportunities to learn, observe, and reflect on their roles and responsibilities as board members of a charter school.

Applicant Evidence :


WTHS - Carolina Achieve Lette...

Uploaded on **4/27/2023** by
Tiffany Alrefae

Q37. Factor (7) Describe whether the nonprofit corporation has existed for more than two years.

The Secretary of State of North Carolina certified the Articles of Incorporation for Durham Aspire Academy, Inc on November 16, 2021. On March 30 of 2023 the Secretary certified an amendment to the Articles that changed the name to Carolina Achieve, Inc.

Applicant Evidence :

	
20230325_180342.PDF	DAA Certified Articles of Incor...

Uploaded on **3/25/2023** by **john oxaal**

Uploaded on **3/9/2023** by **john oxaal**

Q38. Factor (8) Describe whether the proposed board previously operated or currently operates a public charter school?

Three members of the founding team have extensive experience as board members or operators of exceptional public charter schools.

Tom Nechyba was on the founding board and governing board member (for 5 years) of Durham Excelsior Academy a high-performing charter school in Durham with a 100's on its student wait list.

Tiffany Alrefae (although not a board member) was the Dean of Students and Operations at Orlando Science prior to moving to NC in 2022. Orlando Science is a STEM-based school with a similar socioeconomic profile as Carolina Achieve. It is the #1 public charter school in Florida and in the top 20 nationwide.

Charles Lopez was a Board President, Board Member, and staff member specializing in testing at SIA Tech Charter School in Miami Dade.

In addition to these board members, Anjanette Miller has worked as a Special Education Teacher. She also founded an educational advocacy center in Dallas, Texas. Started in 2000, the center worked to bridge higher education access for under-resourced youth through tutoring, counseling, workshops, and parent support programs. With a unique training program, the center built partnerships with local nonprofits, charter schools, and after-school programs to prepare staff tasked with SAT and/or ACT test preparation in an effort to share impactful methods for higher test scores in a more equitable and efficient manner.

Finally, MaKayla Booker was also a Special Education teacher and a Behavioral Specialist. She has founded a center, Wall Street Juniors, to teach financial literacy and entrepreneurship to minority students. MaKayla is also on the founding board of a Charter School in Atlanta Georgia.



2023 NC CHARTER APPLICATION
NC Public Charters





4. Conversion

Q39. Is this application a Conversion from a traditional public school or private school?

Yes

No



5. Replication

Per NC Administrative Code 16 NCAC 06G .0512, 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.

If applying for a replication, please review the following definitions and continue in this section.

(1) "Charter school model" or "model" mean the mission as defined in the charter application and function of a charter school, including its governance, its curriculum, its organizational structure, its targeted population, and other key characteristics of the school, such as small class size, thematic academics, and extended day.

(2) "Successful model" means a charter school model that meets the eligibility requirements in Rule .0513 of this Section.

(3) "Replication" means the act of copying, recreating, or repeating, a successful charter school model. A "replication" requires the utilization of one charter school "model" to form the creation of a new charter school.

(4) "Fast-Track Replication" is a special form of replication in which the approved applicant foregoes the planning year required of new charter school applicants.

History Note: Authority G.S. 115C-218.3;

Emergency Adoption Eff. August 20, 2019;

Eff. March 17, 2021.

Q56. Do you want this application to be considered for standard or fast-track replication?

- Standard
- Fast-Track
- No, this is not a replication



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>)).

Q67. Do you want your application to be considered for an Alternative Charter School?

- Yes
- No



7. EMO/CMO

Q69. Does the Charter School plan to contract for services with an “educational management organization” or “charter management organization?”

- Yes
- No



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.

Q84. 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.

Carolina Achieve prepares K - 8th-grade students to achieve their scholastic, personal, and professional goals through a learner-centered educational program focusing on a strong academic foundation, Habits of Success (entrepreneurial skills), well-being, and a Home-School partnership.

Q85. 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.



Students in North Carolina's Durham and Orange Counties deserve a rigorous, relevant, and reflective K-8 school with a learner-centered paradigm. Carolina Achieve will reimagine the academic and operational design, teacher practices, technology, and data analysis. Families and school leaders in the area seek a K-8 school that prepares students for a rigorous high school. With 500+ student waitlists at local charters and low proficiency scores students in local district schools, Carolina Achieve will fill a gap in the market for parents seeking programming and a learning environment that is designed for the skills and interests of students. Carolina Achieve will use Transcend's Out of the Box report's *10 Leaps for 21st Century Learning* as a framework to design a school that prepares all students to achieve their scholastic, personal, and professional goals through a learner-centered educational program focusing on a strong academic foundation, Habits of Success (entrepreneurial skills), well-being, and a Home-School partnership.

Root: Strong Academic Foundation

Carolina Achieve will be learner-centered and competency-based with a rigorous curriculum that draws resources from innovative charter, independent, and public schools, as well as national leaders in educational programs. The curriculum will focus on the intersection of outcomes, experiences, and the Habits of Success needed for students to experience academic achievement and personal growth.

Academic achievement and growth will be measured using competency-based frameworks and portfolios. To that end, the school will be utilizing the North Carolina Standard Course of Study to build an academic program that is competency-based. Competency-based learning will allow students to progress on their academic journey based on their competency or mastery of being able to apply their knowledge of the standards to new contexts or situations. Carolina Achieve has been in discussion with NC DPI and Assistant Superintendent Andrew Smith since September 2022 to ensure that the school's curriculum and performance standards are aligned with Polaris 2.0's new CBE framework and focus on the science of reading.

The school will become a regional center for teacher training and learning through collaboration with the North Carolina Department of Public Instruction, local universities, and all types of K-8 schools. Members of schools, businesses, and organizations will be represented on the school's advisory board and help shape the school. Similar to a research university or teaching hospital, Carolina Achieve will become a research K - 8 that incubates, proves, and scales innovative methods of teaching and learning that will be shared with the greater North Carolina education community.

Root: Habits of Success (entrepreneurial skills, mindsets, and behaviors)

The Habits of Success, also known as durable skills, are a set of entrepreneurial skills, mindsets, and behaviors:

- purposeful learning and connections
- teamwork and collaboration
- resilience
- accountability
- critical and creative thinking
- empathy

They will be infused and measured throughout the school. Carolina Achieve will seek to engrain the Habits of Success and educational tenets into the school's culture to ensure that all students are prepared for their unique journey to achieve their scholastic, personal, and professional goals. Teachers will employ a growth mindset to help students understand their strengths, opportunities, and needs in academic skills, social and emotional competencies, school culture and climate, and life. The Habits of Success will serve as touchpoints throughout students' school experience, creating a common language and developing Carolina Achieve culture and traditions that will serve as models for students as they learn new ideas and attempt new skills.

Carolina Achieve will become the first school in North Carolina to use Uncharted Learning's nationally recognized curriculum and professional learning programs. Uncharted Learning engages students through entrepreneurship to build the skills need to solve problems in the real world. It focuses on the skills, mindsets, and behaviors that develop the Habits of Success. These habits include purposeful learning and connections, teamwork and collaboration, resilience, accountability, critical and creative thinking, and empathy. The curriculum will be implemented in both elementary school and middle school, and all teachers will be trained in Entrepreneurship Across the Curriculum (EAC). EAC will ensure that teachers are embedding learning that is experiential, applied, reflective, inquiry-based, and collaborative. Therefore, EAC will ensure that Carolina Achieve's curriculum is cohesive and united around building the Habits of



Success in all aspects of the school.

Root: Well-being

Carolina Achieve will become a diverse space that mirrors the local community through NC’s weighted lottery and strategic marketing and enrollment initiatives. Beyond performative inclusion, Carolina Achieve will be a school where every person feels like they belong in every space. This begins with ensuring that policies, practices, and programs reflect the people in the school’s community. Carolina Achieve will strongly commit to providing access, resources, and support to historically and persistently marginalized and excluded students and educators by connecting with local organizations.

Every student’s unique strengths and areas for growth will be recognized, appreciated, and supported, regardless of their identity, background, beliefs, abilities, or neurodiversity. At the beginning of their Carolina Achieve career, students will commit to their journey of growth and achievement during the matriculation ceremony, which they will revisit daily during morning meetings. Students will achieve their goals by believing in their ability to grow and succeed and by actively seeking support from their peers, teachers, and caregivers.

Growth and achievement are not linear journeys. Students will receive additional support through the bespoke advisory program, Student Success System. This program, modeled after independent school programs, transforms the role of the teacher from a homeroom teacher who monitors attendance to a Success Coach and partner in a student’s academic and personal growth. The Carolina Achieve daily schedule has multiple opportunities for students to check in with their Success Coach, reflect on their progress and goals, seek feedback on the next steps, and problem-solve about challenges they face. The Success Coach will provide the student with executive functioning scaffolding throughout their growth and achievement. Student-led conferences and learning showcases will allow students to reflect on their journey.

Root: Home-School Partnership

Family involvement plays an integral role in student academic achievement and personal growth. Carolina Achieve will prioritize building trust and relationships with all students and their family members or guardians. This process begins during student recruitment and then is solidified through the Student Success System between the student, their family, and their Success Coach. The partnership helps ensure students have the support they need to learn and grow academically, socially, and emotionally. Carolina Achieve will work with families and caregivers throughout their student’s entire experience at the school. Opportunities for engagement in school life and learning how to support their students will be provided, including workshops, information sessions, and individual meetings. Every student will be assigned a Student Success Coach as their first point of contact for individual student support. A PTA will be created as part of our Home-School Partnership. At least one member of this committee will sit on the school’s board (see section 10).

Applicant Evidence :

	
IndustrialvsStudent.pdf	10Leaps.pdf

Uploaded on **4/28/2023** by
Tiffany Alrefae

Uploaded on **4/28/2023** by
Tiffany Alrefae

Q86. 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-218.45.pdf).



Carolina Achieve will be a public charter school that provides a rigorous academic program, free of charge, using a learner-centered educational approach to serve the West Triangle Community. Our goal is to create a diverse student body that reflects Orange and Durham Counties' varied demographics in terms of ethnicity, socioeconomic status, ability, gender, non-English speaking origins, and rural versus urban composition. The school's plan to achieve this goal by implementing strategic recruitment, providing targeted transportation, and offering free and reduced lunch. The attached chart provides a snapshot of the current demographics of the surrounding counties, showing that the racial/ethnic makeup of Carolina Achieve's student body would be 47% white, 30% Black, 17% Hispanic, 3% Asian, and 3% two or more races. Carolina Achieve believes that increased diversity will foster a supportive and mentoring environment for students from different backgrounds, identities, beliefs, neurodiversity, and abilities, and commit to also recruiting teachers and staff that also mirror our demographic profile.

The proposed school will abide by the charter school legislation, G.S. 115C-238.29F(g)(5), as stated below:

A charter school shall not discriminate against any student on the basis of ethnicity, national origin, gender, or disability. Except as otherwise provided by law or the mission of the school as set out in the charter, the school shall not limit admission to students on the basis of intellectual ability, measures of achievement or aptitude, athletic ability, disability, race, creed, gender, national origin, religion, or ancestry.

The following chart shows the combined demographics for Orange and Durham Counties that were reported for 2022, where our school will be located, and where the majority of our recruitment efforts will take place:

Ethnicity/Race	# of Students	Percentage (%)
American Indian or Alaska Native	0	0%
Asian	30	3%
Black or African American	270	30%
Hispanic	150	17%
Native HI or Pacific Islander	0	0%
Two or More Races	30	3%
White	420	47%
EDS Subgroups	259	29%
Economically Disadvantaged Students	117	13%
Students with Disabilities	90	10%
English Language Learners	50	6%
Students Experiencing Homelessness	2	1%The

Q87. 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?



Orange County

- 7057 students (K - 12)
- Average 420 students/ elementary school
- Average 535 students/ middle school
- Average class size K: 15, 1 -3: 16 4 -5: 22, 6: 20, 7:23, 8:22

Durham County

- 30806 students (K -12)
- Average 458 students/ elementary school
- Average 618 students / middle school
- Average class size K: 16, 1:15, 2-3:16, 4 -5: 21, 6:17, 7:18, 8:19

The Expedition School

- 354 students (K-8)
- 800 students - # of applicants for the 2023 - 2024 school year

All students and families in Orange and Durham Counties deserve a school that offers customized learning and focused instruction and support, especially students who have been historically and persistently marginalized and underrepresented. These groups include but are not limited to, economically disadvantaged, English language learners, students with disabilities, Black, and Hispanic students. Based on the data from the NC State School Report Card, students belonging to these groups are performing significantly lower than their peers who are not members of these groups. Students from these groups need and deserve something different from what they are currently receiving. Best practices that would benefit these students, such as a strong academic foundation, focus on Habits of Success, well-being, and an effective home-school partnership, have been shown to increase achievement and growth for all students.

Carolina Achieve aims to provide a comprehensive support system for all students, including those from the mentioned groups, on their educational journey. The school will set high expectations for academic and social-emotional development, offer personalized learning paths with trained educators, and provide each student with their own Success Coach to guide them in personal growth and success.

LEA	Orange County		Durham County	
2021 - 2022 Proficiency Levels	Not Proficient	Grade-Level Proficient, but not College and Career Ready	Not Proficient	Grade-Level Proficient, but not College and Career Ready
Mathematics (EOG 3 - 8)	54%	15%	59%	17%
White	38%	16%	23%	17%
Black	73%	14%	70%	17%
Hispanic	72%	14%	67%	17%



Two or more races	57%	18%	54%	12%
Economically Disadvantaged	72%	13%	72%	16%
English learners	87%	9%	81%	12%
Students with Disabilities	88%	6%	83%	10%
Reading				
(EOG 3 - 8)	57%	15%	58%	17%
White	41%	17%	21%	16%
Black	74%	13%	66%	18%
Hispanic	77%	12%	70%	15%
Two or more races	55%	14%	46%	17%
Economically Disadvantaged	77%	11%	72%	16%
English Learners	94%	-	88%	9%
Students with Disabilities	89%	6%	84%	9%
Science				
(EOG 5 & 8)	39%	9%	36%	12%
White	23%	9%	10%	6%
Black	56%	9%	43%	14%
Hispanic	48%	11%	43%	13%
Two or more races	37%	-	29%	11%
Economically Disadvantaged	52%	11%	46%	13%
English learners	69%	11%	64%	13%



Students with Disabilities	79%	7%	70%	10%
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Q88. 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).

Due to Carolina Achieve's central location to two different LEAs, the school expects to draw a majority of its students from Orange and Durham Counties and then a small percentage from other surrounding counties.

	2024	2025	2026	2027	2028
Grades Served	K - 5	K - 6	K - 7	K - 8	K - 8
Total Projected Enrollment	400	500	600	700	800
Students in Orange County K - 8 schools	4915	4915	4915	4915	4915
Students in Durham County K - 8 schools	21258	21258	21258	21258	21258
Total Students in 2 LEAs	26173	26173	26173	26173	26173
% of students from 2 LEAs	1.5	1.9	2.3	2.7	3.1

Q89. Summarize what the proposed school will do differently than the schools that are now serving the targeted population. What will make this school unique and more effective than the currently available public-school options?



1. First School in NC to implement nationally recognized entrepreneurial curriculum

Carolina Achieve will become the first school in North Carolina to use Uncharted Learning's nationally recognized curriculum and professional learning programs. Uncharted Learning engages students through entrepreneurship to build the skills need to solve problems in the real world. It focuses on the skills, mindsets, and behaviors that develop the Habits of Success. These habits include purposeful learning and connections, teamwork and collaboration, resilience, accountability, critical and creative thinking, and empathy. The curriculum will be implemented in both elementary school and middle school, and all teachers will be trained in Entrepreneurship Across the Curriculum (EAC). EAC will ensure that teachers are embedding learning that is experiential, applied, reflective, inquiry-based, and collaborative. Therefore, EAC will ensure that Carolina Achieve's curriculum is cohesive and united around building the Habits of Success in all aspects of the school.

2. Embed Habits of Success (entrepreneurial skills, behaviors, and mindsets) throughout the instructional program K - 8th grade

The Habits of Success and educational tenets will be engrained into the school's culture to ensure that all students are prepared for their unique journey to achieve their goals. Teachers will employ a growth mindset to help students understand their strengths, opportunities, and needs in academic skills, social and emotional competencies, school culture and climate, and life. The Habits of Success will serve as touchpoints throughout students' school experience, creating a common language and developing Carolina Achieve culture and traditions that will serve as models for students as they learn new ideas and attempt new skills.

3. Bespoke advisory, social-emotional learning, and well-being program: Student Success System

At Carolina Achieve, every student's unique strengths and areas for growth will be recognized, appreciated, and supported, regardless of their identity or background. At the beginning of their Carolina Achieve career, students and their families will commit to their journey of growth and achievement by signing the matriculation oath, which they will revisit daily during morning meetings. Students will achieve their goals by believing in their ability to grow and succeed and by actively seeking support from their peers, teachers, and caregivers. However, growth and achievement are not linear journeys, and students who need additional support will receive it from their Success Coach and our wellness team. The Success Coach is a duty that every teacher will take on as part of their teaching responsibilities and the wellness team is made up of school leadership, the counselor, the school nurse, the teacher who is the EC Lead, and various teachers and assistant teachers. The Carolina Achieve daily schedule has multiple opportunities for students to check in with their support network, reflect on their progress and goals, seek feedback on the next steps, and problem-solve about challenges they face. All students K - 8 will have the opportunity to meet with their Success Coach every day, who will provide them with executive functioning scaffolding throughout their growth and achievement. Student-led conferences and Learning Showcases will allow students to reflect on their journey.

4. Direct Connection to NCDPI - Operation Polaris 2.0

The academic journey at Carolina Achieve will be about both growth and achievement. To that end, the school will be utilizing the North Carolina Standard Course of Study to build an academic program that is competency-based. A competency-based program will allow students to progress on their academic journey based on their competency or mastery of being able to apply their knowledge of the standards to new contexts or situations. Carolina Achieve has been in discussion with NC DPI and Assistant Superintendent Andrew Smith since September 2022 to ensure that the school's curriculum and performance standards are aligned with Polaris 2.0's new CBE framework. The founding head of the school also took part in an NCDPI-sponsored workshop with the national non-profit, America Succeeds, to review the organization's durable skills framework that aligns with North Carolina's new Portrait of a Graduate.

5. Home-School Partnership

Caregivers will play an integral role in student academic achievement and personal growth, and Carolina Achieve will work with families and caregivers throughout their student's entire experience at the school. Opportunities for engagement in school life and learning how to support their students will be provided, including workshops, information sessions, and individual meetings. Every student will be assigned a Student Success Coach, one of their teachers serving as an expanded homeroom teacher, as their first point of contact for



individual student support.

A PTA will be created as part of our Home-School Partnership. At least one member of this committee will sit on the school's board (see section 10).

Q90. 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

Carolina Achieve's board members and founding head of school are working to build a large network of support for the school in Orange and Durham Counties. This network of support includes parents of prospective students, local government officials, prominent business owners, community leaders, religious leaders, university professors and staff members, local and national organizations, local and national charter schools, and education non-profits. These founding members have spent the last eighteen months listening to community members to learn about student and family needs, as well as best practices for a learner-centered educational program that prepares students for both college and career. Carolina Achieve will continue this grassroots outreach, marketing, and enrollment campaign throughout the next 12 months to build more awareness and create a pipeline for enrollment.

Outreach activities have included:

- Information sessions (in-person and virtual)
- Online survey
- Petition of support
- Attendance and participation in community events
- Visiting local preschools and childcare centers
- Online marketing (website and social media)
- Guiding conversations with experts, local leaders, and community partners

Q91. 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_Final.pdf

Uploaded on **4/27/2023** by
Lauren Watters

8.2. Purposes of the Proposed Charter School

Q92. 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.

Q93. Provide a brief narrative to coincide with **each** applicable legislative purpose(s).



Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site.

Carolina Achieve aims to be a destination employer for educators and professionals who are interested in a K-8 school that incubates, proves, and scales innovative teaching and learning practices. The school will create a professional community that values authenticity, autonomy, continual growth, respect, and empathy. Teachers will have opportunities to develop and share their interests and skills, as well as lead projects and initiatives that align with their passions inside and outside of the classroom. They will use best practices to develop a mission-specific, learner-centered curriculum, instruction, and assessment structure that focuses on personalized learning, competency and inquiry-based education, and whole-child support.

Carolina Achieve is located in the ideal location to both become a center for teaching and learning and benefit from the higher education and workforce ecosystems. The school will look for ways to partner with local schools, colleges, and universities, as well as businesses and organizations to ensure that teachers are on the forefront of best practices and can provide students with meaningful connections between the skills that they are learning and their application outside of the classroom.

Hold schools accountable for meeting measurable student achievement results.

Carolina Achieve will set the standard for K-8 student achievement in Orange County. With many students in the county from historically and persistently marginalized and excluded groups underachieving, Carolina Achieve will look to models both from around NC and from other states that provide roadmaps for student academic and social-emotional growth and achievement. This structure, which places the learner at the center of the school, will employ a learner-centered approach, utilizing the framework from the Learner-Centered Collaborative and based on the proven models of Building 21 Schools, to set the standard for high expectations and every decision regarding the programs, policies, and practices. With the learner at the center, Carolina Achieve will define the desired outcomes, design meaningful learning experiences, and create the conditions for success. Success is when students are achieving their scholastic, personal, and professional goals. These conditions will set Carolina Achieve apart from the other schools in the area in both program and culture that ultimately yield increased student achievement. Carolina Achieve will look to share its innovative practices with surrounding schools in order to raise the achievement gap for all students in Orange County and the surrounding areas by becoming a center for teaching and learning.

Provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system.

Carolina Achieve will be only the third charter school in the county that offers a K - 8 educational program and the only K-8 to open since 2012 and the pandemic. The other traditional public schools follow education models that were designed for the industrial paradigm, which sorts and ranks students to fit into specific roles, instead of unlocking the potential for all students to thrive and contribute to their communities. The need for a shift in paradigms was made clear during the 2019 - 2021 school years. This experience created a once-in-a-lifetime opportunity to transform education. Lessons learned from this time of remote and hybrid learning allowed students, teachers, and families/caregivers to truly understand what students need to achieve their scholastic, personal, and professional goals. These factors set Carolina Achieve apart and give them the distinct advantage of providing parents and students with an expanded choice of educational opportunities for their children. The school's programs, policies, and procedures will directly reflect current educational best practices in teaching and learning that correlate to increased student growth and achievement.

Improving student learning.



Both academic and social-emotional success and student learning increase when students are in the same environment for an extended period of time. The students at the K-8 or K-12 charter schools in Orange County consistently outperform their peers at traditional public schools in mathematics, reading, and science. However, those charter schools are unable to expand their enrollments, leading to waitlists of over 800 students and not being able to provide sibling preference for Kindergarten lottery openings. Carolina Achieve will provide a K-8 experience that enables students to grow at their own pace while being prepared for a rigorous college-preparatory high school. The Association for Middle School Level Education (AMLE) publication *This We Believe* (2003) states that young people undergo more rapid and profound personal changes between the ages of 10 to 15 than at any other time in their lives. Charter school research (Miller, 2011) noted that the longer a student remained at a charter school with combined grade levels and divisions, the more the achievement gap closed. This data was attributed to the consistency of the instructional practices, school rules and expectations, and relationships with school staff. The school also will move beyond the project-based curriculum offered at other area schools. Carolina Achieve's curriculum will be learner-centered and focused on students applying their skills and knowledge to solving real problems. They will do this by partnering with Uncharted Learning and District C to connect students to government offices, businesses, and other organizations in the community. This methodology prepares students to seamlessly transition to rigorous high schools and universities while developing the Habits of Success that are required for the workforce of today and tomorrow.

Increasing learning opportunities for all students, with a special emphasis on at-risk or gifted students.

Carolina Achieve will provide all students with a support system that is unique and apart from other traditional and charter public schools. The Carolina Achieve Success Support System is a multi-tiered system of support that focuses on individual student growth and needs. This wraparound support unites students, educators, and families/caregivers to form a team designed to promote each student's unique growth and achievement. Daily conferences, consistent feedback, and an individual Success Coach for every student that ensures each student's needs are known and met proactively. This system will provide both at-risk and gifted students with the opportunity to achieve their full potential.

Carolina Achieve will also actively look to recruit faculty and staff members that reflect Orange County and the surrounding Triangle community. Student achievement increases when there are both high expectations and the students are able to connect with faculty members who have similar identities, backgrounds, and experiences. The school will look to develop partnerships with organizations like LatinxED, the NCCU Marathon Teacher Institute, and Ablr to increase pathways to becoming educators at the school.

Encourage the use of different and innovative teaching methods.

Carolina Achieve teachers will move beyond traditional instructional methods by utilizing proven methodology by Uncharted Learning, District C, Learner-Centered Collaborative, and Building 21. These methods focus on the teacher becoming a guide or coach as each student moves along their individual educational journey. Throughout their journey, students will be asked to develop mastery or competency in specific skills and then apply their knowledge to create solutions to real problems. This approach relies on teachers providing individual instruction and differentiation, consistent feedback, and building the Habits of Success. It will make the teaching and learning proactive to meet the needs of the students at any given point in the school year, rather than reactively providing intervention to fill gaps in knowledge or skills.

8.3. Goals for the Proposed Charter School

Q94. 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.



1. Performance on state assessments will exceed the existing schools in the same LEA (reported annually) by 20%
2. Earn a B or better every year according to the NC Report Card
3. 90% of graduating eighth-grade students will be prepared to enter high school at the College and Career Ready Level in mathematics and reading
4. More than 50% of the graduating eighth-grade class will have earned at least one high school credit
5. School budget will retain a cash reserve each academic year (cashflow reported monthly; annual report on final status). The goal over time will be to retain a cash reserve equal to 60 school days of operation.
6. Annual financial audits with no significant deficiencies found in our financial operations or our systems for reporting to the NCDPI.
7. School will be in compliance with all aspects of OCS Performance Framework (reported annually)
8. School will join Cognia and will be in the process of applying for accreditation and CBE certification

The board will have four committees committed to these goals and will ensure that the goals listed above are reviewed on a regular basis. The academic and financial goals will be reviewed monthly, while the accreditation goal will be reviewed quarterly. Progress will be monitored on a dashboard that the Head of School creates and will summarize the school's current year-to-date performance for each goal.

The school will also become a member of Cognia and apply for both accreditation and CBE certification. In order to achieve all five of its goals, Carolina Achieve will participate in a review schedule set by Cognia. The review findings will be shared with the Carolina Achieve community and made public on the school's website. In between the Cognia review years, Carolina Achieve will partner with local charter schools with similar missions to ensure that the goals are being met, as well as regular reviews to ensure that the OCS Performance Framework requirements are being met.

Cognia Accreditation Process -

“The current accreditation protocol is six years for most institutions. The six-year accreditation term adds more time for institutions to identify, implement, and evaluate improvement activities; and additional touch points throughout the term will provide more support from Cognia. Institutions new to Cognia begin with familiarizing themselves with Cognia and the accreditation process. All institutions engage in the three main phases of accreditation: Self-Assessment, Engagement, and Progress. Essential to accreditation, as well as certification processes, is the Engagement Review—an in-depth exploration of your institution that uses your own evidence, plus stakeholder input and expert analysis, to identify noteworthy practices and next steps for improvements.”

Q95. How will the governing board know that the proposed public charter school is working toward attaining their mission statement?



The governing board will take the following steps to ensure that Carolina Achieve is effectively working toward attaining its mission statement:

- Regularly review and update the mission statement to keep it relevant and aligned with the school's goals and objectives.
- Conduct regular evaluations, both internal and external, to assess the school's performance and progress toward its mission. The board will utilize the NC Charter School Performance Framework for internal evaluations and seek accreditation from Cognia for external evaluations to ensure compliance with state and national standards. This evaluation process will assess student achievement, teacher effectiveness, and parent satisfaction.
- Review data and metrics, such as student attendance, academic growth and achievement, social and emotional learning, diversity, and safety, regularly to measure the school's effectiveness.
- Engage with stakeholders, including teachers, parents, and students, to gather feedback on the school's progress toward its mission. This will help the board understand the strengths and weaknesses of the school.
- Conduct regular self-assessments to evaluate the board's effectiveness in supporting the school's mission. This will identify areas for improvement and enable the board to take appropriate action.

The Board of Directors will meet regularly per its board approved governance documents. It will receive updates on the school's performance from the Head of School. Also, the Board has the power to form separate committees to implement the school's mission.

To provide effective oversight, the Board will appoint committees that measure and analyze the desired outcomes of the school around Academics, Finance, Development, and Governance. Committee members may consist of board members, parents, community members, field experts, and teachers. Each committee will have specific roles and responsibilities which include the analysis and solutions to identified issues. Evaluation data will be analyzed by committees to identify trends, flag unacceptable results, make adjustments to the education plan, curriculum, instructional methods, and school operations as necessary.

The committees will provide specific scheduled reports (seven days in advance) to the board according to the outcomes based board calendar. These reports, as well as strategic questions, will drive the discussion and board action to navigate the organization towards its mission. The head of school will be responsible for developing plans of action and solutions. Some actions may require board approval (i.e. curriculum, staffing, academic calendars).

By continually evaluating and monitoring the school's progress towards its mission, the governing board can ensure that Carolina Achieve is providing the best possible education to its students and working effectively towards its goals.



9. Educational Plan

9.1. Instructional Program

Q96. 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



Carolina Achieve's instructional program is designed around its Four Roots: a strong academic foundation, Habits of Success, well-being, and the Home-School Partnership. Out of these roots will be the strong trunk focused on a learner-centered and competency-based education, which connects and feeds every branch of program, policy, practice, and procedure at the school. Carolina Achieve believes in the shift to a student or learner-centered paradigm because it ensures that all students receive a high-quality education in order to unlock their full potential to thrive and contribute to the world around them. The educational environment and experiences must then be rigorous, relevant, and reflective. To this end, Carolina Achieve's instructional program will focus on the whole child, equitable access, relevance, social and emotional learning, connection to the community, student agency, and customization through competency-based education.

In order to supplement and support teachers in creating a learner-centered and competency-based school, four foundational texts will be used for professional development and learning, as well as resources to ensure that all programs, practices, policies, and procedures are aligned with the school's mission, vision, and values. These texts are:

- *Evolving Education: A Switch to a Learner-Centered Paradigm* by Katie Martin
- *The New Classroom Instruction that Works* by Bryan Goodwin and Kristen Rouleau
- *Culturize: Every Student, Every Day Whatever it Takes* by Jimmy Casas
- *Deeper Competency-Based Learning: Making Equitable, Student-Centered Sustainable Shifts* by Karin Hess, Rose Colby, and Daniel Joseph

The school will also use New Classrooms and Transcend's *Out of the Box Report's* 10 Leaps for 21st Century Learning as a framework to design a learner-centered and competency-based school that prepares all students to achieve their scholastic, personal, and professional goals.

Below shows how the 10 Leaps connect to Carolina Achieve's Four Roots (see attachment for more information on the 10 Leaps). Each of the 10 Leaps is listed under the Root with which they share the greatest connection.

Root: Strong Academic Foundation

Leap 1: High Expectations with Unlimited Opportunities

Carolina Achieve will set high expectations for all students regardless of their identity, background, ability, beliefs, or neurodiversity. They are going to meet the needs of all students. The school's Habits of Success will be woven into the very fabric of the school's programs, policies, practices, and procedures, serving as the foundation and guide for holding every student accountable to high expectations for academic and personal growth. Carolina Achieve has partnered with Uncharted Learning, a national leader in entrepreneurial education and professional development, to ensure that teachers receive the proper support around teaching and measuring the Habits of Success listed below:

Habits of Success (<https://aurora-institute.org/resource/habits-of-success-helping-students-develop-essential-skills-for-learning-work-and-life/#:~:text=These%20%E2%80%9Chabits%20of%20success%E2%80%9D%20include,%2C%20social%20awareness%2C%20and%20others.>)

- Purposeful learning and connections
- Teamwork and collaboration
- Resilience
- Accountability
- Critical and creative thinking
- Empathy

Space and time will help teachers uphold their high expectations. Flexible classrooms and a unique schedule design enable teachers to provide targeted instruction for individual students and small groups that provide scaffolding to ensure that all students receive both



enrichment and support. Teachers will also use the Data Wise Improvement Process to help drive instruction. The process helps create a culture of inquiry for teachers (see Leap 3 below). Key aspects of this program include instructional rounds, collaborative inquiry, data analysis, action planning, implementation, and monitoring. Teachers will use the data to make changes to the curriculum, instruction, and assessments in real time, rather than waiting to make the changes for the following year. This type of responsive educational program is effective in supporting the academic and personal growth of students by providing them with increased and targeted differentiation and personalized learning. Numerous national studies have shown that data-driven instruction can increase student academic achievement for all students.

Students need support in order to meet high expectations. This support comes in the form of Carolina Achieve's unique Student Success System. Carolina Achieve will have an interconnected advisory system that will be the foundation for student success inside and outside of the classroom. All students will be assigned a Success Coach. The Success Coach transforms the role of the homeroom or advisor into something more meaningful. This person will meet with students three times daily and serve as their guide throughout the year. Students will meet with their Success Coach to reflect on their academic and personal growth to develop their individualized learning profile and pathway, as to how it relates to their goals. The group of students assigned to one coach will be called the Student Success Team and they have the following goals:

- Develop relationships
- Build healthy practices
- Establish school norms, patterns, and culture
- Support executive function, reflection practices, and metacognition
- Matriculation commitment to academic and personal growth and achievement

Alamance Community School will guide best practices for high expectations for inclusion and equity around learning, ability, and neurodiversity differences.

Leap 3: Rigorous Learning

The Association for Supervision and Curriculum Development (ASCD) outlines that "rigorous teaching and learning involves setting high expectations while maintaining a balance among the complexity of the learning content (texts, concepts, etc.), cognitive engagement with that content (learning tasks), and a teacher's ability to make the content or tasks accessible to every student." Carolina Achieve will ensure that there is rigorous learning at the school by following the Learner-Centered Framework to ensure that its learning model is authentic, personalized, competency-based, inclusive, and equitable (see attachment for more information on learner-centered curriculum). The goal is to increase student agency and empowerment, connect learning to the real world, design learning experiences requiring students to use all the different levels of Bloom's Taxonomy and meet the needs and different entry points of the diverse student body. Carolina Achieve is committed to providing on-grade-level curriculum, instruction, and assessments to students as the primary course of study for all students with the necessary scaffolding and differentiation as needed. Teachers will then provide additional targeted support to help bridge gaps and support on-grade-level learning. These two interconnected instructional elements will enable all students to experience academic success on their own personal learning journey.

Curriculum

Carolina Achieve teachers will develop a strong academic foundation with a school-specific curriculum, instruction, and assessments. This curriculum builds on guidance from the following schools: Alamance Community School, Bridge Prep Charter School, and Building 21, and resources that are backed with verified reviews from the national leader in instructional materials, Edreports, and are industry leaders. The school will conduct curriculum reviews on a regular basis to ensure effectiveness and relevance.

The components of core subjects include the following:

- English Language Arts:
 - Standards - NC Course of Study and Common Core
 - Curriculum, Programs, and Resources:



- Amplify CKLA
- Amplify Foundations of Reading
- Science of Reading
- Orton Gillingham
- HillRap
- Mathematics:
 - Standards - NC Course of Study and Common Core
 - Curriculum, Programs, and Resources:
 - Illustrative Math
 - Amplify Demos
 - Teach One
- Science:
 - Standards - Next Generation Science Standards and NC Course of Study
 - Curriculum, Programs, and Resources:
 - Amplify Science
 - Project Lead the Way
 - Engineering is Elementary
- Social Studies:
 - Standards - C3 and North Carolina Course of Study
 - Materials - Primary resources

Instruction

Teachers at Carolina Achieve will implement best practices from the book, *The New Classroom Instruction that Works*, by Bryan Goodwin and Kristin Rouleau. As stated on the ASCD website, this book is “built on a more rigorous research base and updated to emphasize student diversity, equity, and inclusion, The New Classroom Instruction That Works offers a streamlined focus on the 14 instructional strategies proven to promote deep, meaningful, and lasting learning:

- Cognitive interest cues
- Student goal setting and monitoring
- Vocabulary instruction
- Strategy instruction and modeling
- Visualizations and concrete examples
- High-level questions and student explanations
- Guided initial application with formative feedback
- Peer-assisted consolidation of learning
- Retrieval practice
- Spaced and mixed independent practice
- Targeted support
- Cognitive writing
- Guided investigations
- Structured problem solving

These strategies—all of which are effective and complementary—are presented within a framework geared toward instructional planning and aligned with how the brain learns.

Students at Carolina Achieve will participate in these four types of instruction:

1. Whole group/Teacher-led: Less than 30 min/day
2. Small group/Teacher-led: Targeted support for students with similar abilities and skill levels - main instructional approach
3. Teams: Students will work on tasks or projects collaboratively while their teacher meets with another group - main instructional approach
4. Individual: Every student will meet with their teacher once a week during class and with their Success Coach daily to monitor progress

Teachers are expected to provide differentiation to meet the individual needs of all students (see attachment for more information on differentiated instruction). According to Carol Tomlinson, an expert in differentiation, “The aim of differentiating instruction is to



maximize the growth of all students by meeting them where they are." A teacher can differentiate through content, process, product, or environment, according to a student's readiness, interest, and learning profile. Differentiation helps increase achievement for all students by addressing diverse learning styles, catering to individual needs, promoting inclusivity, and enhancing student motivation.

Source: https://pdo.ascd.org/LMSCourses/PD11OC115M/media/DI-Intro_M1_Reading_What_Is_DI.pdf

Assessments

- Internal:
 - Types of Assessment:
 - The following assessment OF/FOR/AS learning table is a compilation of a wide variety of resources that goes a bit further than simple definitions (Chappuis et al., 2012; Fenwick & Parsons, 2009; McNamee)

Assessment	Of Learning	For Learning	As Learning
Type	Summative	Formative	Formative
What	Teachers determine the progress or application of knowledge or skills against a standard.	Involves formal and informal assessment activities as part of learning and to inform the planning of future learning.	Learners use formal and informal feedback and self-assessment to help them understand the next steps in learning.
Who	Teacher	Teacher & peers	Learner & peers
How	Formal assessments are used to collect evidence of student progress and may be used for achievement grading on grades.	Involves formal and informal assessment activities as part of learning and to inform the planning of future learning.	Learners use formal and informal feedback and self-assessment to help them understand the next steps in learning.
When	Periodic	Ongoing feedback	Continual reflection
Why	Reporting	Improve learning	Deeper learning and learning how to learn
Emphasis	Scoring and grades	Feedback, support, and collaboration	Collaboration, reflection, and informal feedback

- Competency-Based Education (aligning with Operation Polaris 2.0)
 - Students advance upon demonstrated mastery.
 - Competencies include explicit, measurable, transferable learning objectives that empower students.
 - Assessment is meaningful and a positive learning experience for students.
 - Students receive timely, differentiated support based on their individual learning needs.
 - Learning outcomes emphasize competencies that include the application and creation of knowledge and the development of essential skills and dispositions.
 - Mastery of competencies is tracked and validated outside of traditional time-based courses and credits. Students earn mastery credits when they complete their competency requirements (e.g., a body of work, portfolio system, evidence pieces, etc.).
 - Mastery is on a continuum of readiness which requires students to demonstrate proficiency in a competency multiple times in multiple ways
 - Carolina Achieve will have a platform accessible to students, educators, and caregivers to track progress toward mastery
 - Carolina Achieve educators will utilize resources from Building 21/Aurora Institute/Mastery Track/Mastery Transcript/Mastery Connect



(see Appendix B)

- All Carolina Achieve students will have a digital portfolio that will track their growth and achievement. Students will use the portfolios during meetings with their Success Coach or having a student-led conference with their caregivers midway through the marking period.
- Carolina Achieve will regularly host showcases and celebrations of student growth and achievement. Every student will pick an artifact from their portfolio to highlight in an end-of-marking marking period showcase. The artifact does not need to be complete but could demonstrate their progress toward mastering a skill.
- NWEA MAP Growth Report and NC Check-Ins - Carolina Achieve educators will use these assessments at regular intervals to track student progress toward state standards. The data will allow them to provide more targeted enrichment and reinforcement.
- External:
 - State Assessments - Carolina Achieve students will participate in all required state assessments.

Reflection and Accountability:

Teachers at Carolina Achieve will use Harvard's Data Wise Improvement Process to improve teaching and learning through evidence-based analysis. As stated on their website, "This 8-step process occurs in three phases. The "Prepare" phase involves creating and maintaining a culture in which staff members can collaborate effectively and use data responsibly. In the "Inquire" phase, educators use a wide range of data sources, including test data, student work, and classroom observations, so that they can define a very specific problem of practice that they are committed to solving. In the "Act" phase, teams articulate how they will learn and employ high-leverage strategies to address their problem, and how they will assess the extent to which the plan improved outcomes they care about. After educators assess the effectiveness of their actions, they can both identify needed adjustments to their plan and determine the focus for the next cycle of collaborative inquiry. The habits of mind that underlie the work include (1) a shared commitment to action, assessment, and adjustment, (2) intentional collaboration, and (3) a relentless focus on evidence."

Carolina Achieve wants to ensure that all students progress on their academic and personal learning journeys. Therefore, the school commits to helping all students progress through the standards and competencies in a timely fashion. The school will put together a set of checks and balances to ensure that all students who are not progressing in a timely manner are provided the additional support and services needed to experience academic success.

Leap 4: Relevance

As Carolina Achieve educators design the curriculum, they will take every opportunity to ensure that learning explores students' interests, is connected to their communities, and takes real problems in authentic contexts. Examples of this at Carolina Achieve will include:

- STUDIO (Based on Building 21 concept): This 6-12 week problem-based unit is designed to assess competencies often across multiple disciplines. It follows the Studio Cycle where students begin with a problem frame and culminate with an authentic implementation of their solution. Studios at Carolina Achieve will be based on community challenges. They will be developed in consultation with school partners to connect students with people in the greater community.
- 5th-grade Capstone and 8th-grade Capstone TEAMSHIP (in collaboration with District C): Students will work together to utilize their knowledge and experience gained at Carolina Achieve to solve a real-life problem in a specialized area in conjunction with a community partner. This capstone will take place at the end of the school year and combine work from multiple classes. The experience will culminate in a Pitch Night that invites students, educators, caregivers, community partners, and other guests. Students will pitch their plans to their community partners and receive authentic feedback.

Leap 10: Anytime, Anywhere Learning

Carolina Achieve will utilize the lessons that schools and educators learned during the pandemic. Learning can happen anywhere, and technology can be an indispensable resource and tool. The academic program will be dynamic and adaptive. Carolina Achieve will have a robust Learning Management System that will enable students and caregivers to access learning opportunities beyond the classroom walls. Best practices will align with the ISTE standards and follow recommendations from Common Sense Media. Students will be able to navigate the digital world as both citizens and learners. The school will provide classroom technology and a device program for students



(K-2 tablets, 3 - 8 laptops).

Root: Habits of Success

Leaps 8 and 9: Customization & Active Self-Direction

Carolina Achieve believes that young people must be the active drivers of their education. The academic program and schedule allow students to tackle challenges, receive feedback, and have a voice in their learning to develop agency and build on their prior knowledge. In order to do this students must master the competencies outlined in the Habits of Success:

- Purposeful learning and connections
- Teamwork and collaboration
- Resilience
- Accountability
- Critical and creative thinking
- Empathy

A developmentally appropriate rubric will be created for the Habits of Success so that students and teachers can reflect on where they are on their journey toward mastering these competencies.

Resources and support are provided throughout the day so that all learners can experience success through the following avenues:

- Individualized Learning Profile and Path (which will be based on Rand Infographic): The profile is created each year with the student and is updated regularly to show the student's strengths, weaknesses, preferences, and goals. This data supports the student's ability to self-reflect, set goals, advocate for needs, and monitor progress. The path helps teachers choose a variety of instructional approaches and curriculum materials to allow for student choice as students set and manage their personal academic goals. Curriculum materials can include online learning platforms that provide students with formative assessments and instruction to provide work at grade level and to bridge the gaps.
- Power Hour: A dedicated time at the end of each school day allows students to work independently, in small groups, or meet with a teacher. During this time, students work toward completing tasks and mastering skills based on their competency-based progression.

Root: Well-being

Leap 2: Whole-(Learner) Focus

Katie Martin's Learner-Centered framework will provide guidance in Carolina Achieve's pursuit of becoming a learner-centered school. This guiding document will help ensure that student experiences at school nurture the totality of cognitive, emotional, social, and physical factors that impact their learning, development, character, and overall health and well-being. As explained in the framework, Whole-(Learner) outcomes include agency, collaboration, and real-world problem-solving. Teachers will look for authentic ways to incorporate these outcomes into all aspects of the school, as stated in an excerpt below from the Learner-Centered Collaborative website.

- Agency
 - Learners set goals, initiate action, and persist through challenges by pursuing interests, building on strengths, and working purposefully to develop knowledge, skills, and dispositions critical for a changing world.
- Collaboration
 - By building empathy, respect, understanding, and connection with communities near and far, learners express comfort working with people similar to and different from themselves, can be relied upon, and engage productively with all.
- Real-world problem solving
 - Respectfully expressing curiosity about the past, present, and future, learners plan, apply skills and knowledge, and reflect often to carry out individual and collective action to solve problems that matter to them and their world.

Decisions need to be made every day in school, but in order for a school to remain learner-centered the decision-makers need to reflect on whether or not a proposed decision will align with Carolina Achieve's mission, vision, and values. Therefore, before making any



decisions, teachers will ask four questions:

1. Does this _____ meet the mission of our school?
2. Does this _____ enhance the student experience and align with the POL?
3. Does this _____ ensure inclusion and belonging?
4. Does this _____ attract more people to want to join or help our community?

If the answer is yes to all four, then the decision to the question will be yes. If there are any Nos, then a group must study the impact and report back to the committee.

Leaps 5 and 6: Affirmation of Self and Others and Social Consciousness & Action

Carolina Achieve will combine the CASEL Framework with elements of Responsive Classroom to develop its social and emotional curriculum. While Carolina Achieve will not utilize the curriculum and professional development directly from Responsive Classroom and instead engage with local experts in Responsive Classroom, the organization's mission of providing an evidence-based approach to education that focuses on the strong relationship between academic success and social-emotional learning, aligns with the school's mission, vision, and values. The school hopes to build a school culture and environment similar to the Responsive Classroom approach, where educators are empowered to create safe, joyful, and engaging learning communities where all students have a sense of belonging and feel significant.

In addition, students will participate in a daily morning meeting with their Success Teams and Success Coach. This time sets the tone for the day and is used for community building and teaching social and academic skills. It has four parts: greeting, sharing, an activity, and a message. Educators and students can use this time to help students develop a positive sense of self and a deep respect for other identities. We also embed character education in this time, and students can discuss and provide solutions to problems they encounter inside and outside the classroom.

Root: Home-School Partnership

Leap 7: Connection & Community

Relationships are at the heart of the Carolina Achieve community. Learners are deeply known, collaborate closely, and form meaningful relationships across lines of difference that nurture empathy, foster belonging, support well-being, and build social capital. We will build this through the following:

- Success Teams: Carolina Achieve will have an interconnected advisory system that will be the foundation for student success inside and outside of the classroom. All students will be assigned a Success Coach. This person will meet with students three times daily and serve as their guide throughout the year. The group of students assigned to one coach will be called the Student Success Team and they have the following goals:
 - Develop relationships
 - Build healthy practices
 - Establish school norms, patterns, and culture
 - Support executive function, reflection practices, and meta-cognition
 - Matriculation commitment to growth and achievement.
- Buddy Program: Younger and older students are paired together for various events and activities throughout the school year. Buddy events and activities help build school culture, provide leadership opportunities, and create an environment where students can learn valuable social and emotional skills from one another.
- Community Partnerships: Carolina Achieve is developing partnerships with local businesses, organizations, government agencies, and universities. These partnerships will set Carolina Achieve apart from the other regional charter schools. Partners will help with students'



projects, build community engagement, and act as resources as educators develop best practices for teaching and learning.

Carolina Achieve will regularly assess its programs and initiatives to ensure that they are aligned with the school's mission and vision. The school understands that its curriculum, instruction, and assessments need to be accessible to all students, including those from special populations, "at risk", and exceptional children. Therefore, the school will work with all students and families to provide the necessary differentiation, scaffolds, and supports needed for all students to continue to grow academically and personally.

Applicant Evidence :

 Out-of-the-Box-Full-Report.pdf	 Model_LC-Experiences-with-g... From Learner-Centered Collaborative	 Learner-Centered Framework... From Learner-Centered Collaborative	 Data Wise.jpg Data Wise School Improvement Process
Uploaded on 4/25/2023 by Tiffany Alrefae	Uploaded on 4/25/2023 by Tiffany Alrefae	Uploaded on 4/25/2023 by Tiffany Alrefae	Uploaded on 4/25/2023 by Tiffany Alrefae
 Studio.png From Building 21	 Screenshot 2023-01-20 6.43.28... From District C	 personalized learn.png From Rand	 CASEL Framework.png From CASEL
Uploaded on 4/25/2023 by Tiffany Alrefae	Uploaded on 4/25/2023 by Tiffany Alrefae	Uploaded on 4/25/2023 by Tiffany Alrefae	Uploaded on 4/25/2023 by Tiffany Alrefae
 Screenshot 2022-08-28 9.43.31... From Uncharted Learning	 DI-Intro_M1_Reading_What_Is_...		
Uploaded on 4/25/2023 by Tiffany Alrefae	Uploaded on 4/24/2023 by Tiffany Alrefae		

Q97. Will the proposed charter school serve a single-sex student population?

- Yes
- No

Q101. 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.

- Carolina Achieve will be a K-8 school, with grades K-5 in elementary school and 6 - 8 in middle school.
- The average class size will be between 20 - 25 students per section and 4 - 5 sections per grade when full enrollment has been achieved.
- Every K & 2 core classroom will have a teacher and an assistant teacher, with 3rd - 5th grade having a core teacher and sharing another group of assistant teachers.
- Each student will be assigned a Student Success Coach, who will be their advisor.
- Teachers will use a variety of classroom-based instructional methods, including direct instruction, station- rotation, small group, inquiry-based, and individual learning paths to meet the needs of all students and ensure growth.
- The school and classroom spaces' design will reflect an adaptable and multi-use community.
- The sounds you hear throughout the entire space will be organic and result from learning and discussion. There will be no bell to signify the passing of time.
- Furniture will be movable and provide a multitude of arrangements for both individual and group work, including a variety of flexible seating options.
- Classroom walls and hallways will be decorated with student learning and artwork to reflect growth and achievement.



Q102. 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.



Carolina Achieve's instructional plan and curriculum are intricately linked to its mission to be an inclusive school that ensures that all students are prepared to achieve their scholastic, personal, and professional goals. The school and its mission aim to provide all students, regardless of identity, background, beliefs, ability, or neurodiversity, in the Orange and Durham County areas with a high-quality, learner-centered, and competency-based curriculum. All of these goals directly align with and support the North Carolina Accountability Model because of the focus on student growth and achievement and increasing the rate of students who graduate by employing effective and high-qualified teachers, measuring academic progress and engagement, incorporating social and emotional programs, and providing all students with grade-level curriculum, instruction, and assessments.

National studies have shown that this type of instructional program and curriculum that emphasizes building skills and being able to apply them to new context leads to higher levels of student engagement, academic achievement, and high graduation rates, especially among students of color and from low income families. Currently, students from Orange and Durham Counties who are members of these groups, as well as students with disabilities, and English language learners, are not achieving grade-level proficiency or college and career readiness levels at the same rates as students who identify as White. Carolina Achieve will aim to exceed the local school report card rating and student proficiency rates for all groups.

Studies that Support this Curriculum and Instructional Plan

Rand Corporation - competency-based education programs led to higher levels of student engagement, academic achievement, and higher graduation rates for students of color and low-income students. The study examined four competency-based education schools across the United States and found that they were successful in closing achievement gaps between these student groups and their peers.

https://www.rand.org/pubs/research_reports/RR1365.html (https://www.rand.org/pubs/research_reports/RR1365.html)

National Governors Association - competency-based education can be a powerful tool for reducing achievement gaps. The report noted that students who struggle with traditional classroom settings may benefit from the flexibility and individualization provided by competency-based education programs.

https://www.nga.org/wp-content/uploads/2020/01/NGA_Report_on_Compentency-Based_Education-1.pdf (https://www.nga.org/wp-content/uploads/2020/01/NGA_Report_on_Compentency-Based_Education-1.pdf)

Center for American Progress - competency-based education had a positive impact on student outcomes for English Language Learners (ELLs) and students with disabilities. The study found that these students demonstrated greater academic growth in competency-based classrooms than in traditional classrooms.

<https://www.americanprogress.org/issues/education-k-12/reports/2015/06/22/115157/beyond-classroom-walls-the-promise-of-personalized-learning-for-students-with-disabilities-and-english-learners/> (<https://www.americanprogress.org/issues/education-k-12/reports/2015/06/22/115157/beyond-classroom-walls-the-promise-of-personalized-learning-for-students-with-disabilities-and-english-learners/>)

Center for Reinventing Public Education - competency-based education programs can improve outcomes for underperforming students. The report examined several LC-CBE schools and found that they were successful in engaging underperforming students and improving their academic performance.

<https://www.crpe.org/sites/default/files/crpe-BCS-mindset-final-2019.pdf> (<https://www.crpe.org/sites/default/files/crpe-BCS-mindset-final-2019.pdf>)



National Center for the Improvement of Educational Assessment - competency-based education programs can lead to higher levels of academic achievement for students with disabilities. The study found that students with disabilities who participated in competency-based education programs demonstrated greater academic growth than those who did not participate.

https://www.nciea.org/sites/default/files/publications/CBESupportsStudentsWithDisabilities_1.pdf (https://www.nciea.org/sites/default/files/publications/CBESupportsStudentsWithDisabilities_1.pdf)

National Education Association - social-emotional learning programs are particularly effective in closing achievement gaps for Black and Hispanic students. The report notes that these programs can help improve student outcomes in areas such as academic achievement, behavior, and social-emotional skills.

https://www.nea.org/assets/docs/PB11_Social-EmotionalLearning.pdf (https://www.nea.org/assets/docs/PB11_Social-EmotionalLearning.pdf)

New York Performance Standards Consortium (28 public high schools in New York City that use a performance-based assessment system) - students of color, low-income students, and English language learners outperformed their peers in traditional schools on state exams and graduation rates. In 2018, 95% of Consortium graduates were accepted to college.

https://performanceassessment.org/wp-content/uploads/2018/09/2018_ConsortiumSummaryBrief_FINAL.pdf (https://performanceassessment.org/wp-content/uploads/2018/09/2018_ConsortiumSummaryBrief_FINAL.pdf)

Highlander Institute - personalized learning led to higher academic achievement, improved attendance, and increased student engagement.

<https://highlanderinstitute.org/wp-content/uploads/2018/10/2018-HL-Blended-Learning-Research-Summary.pdf> (<https://highlanderinstitute.org/wp-content/uploads/2018/10/2018-HL-Blended-Learning-Research-Summary.pdf>)

Mastery Collaborative - students in mastery-based classrooms showed higher levels of engagement, critical thinking, and collaboration. Additionally, they found that Black and Hispanic students in mastery-based classrooms outperformed their peers in traditional classrooms on state exams.

https://masterycollaborative.org/wp-content/uploads/2018/04/MC-Full-Report_0418.pdf (https://masterycollaborative.org/wp-content/uploads/2018/04/MC-Full-Report_0418.pdf)

National Commission on Social, Emotional, and Academic Development - students who participate in social-emotional learning programs have higher academic achievement, better attendance, and fewer behavioral problems.

<https://www.aspeninstitute.org/publications/from-a-nation-at-risk-to-a-nation-at-hope/> (<https://www.aspeninstitute.org/publications/from-a-nation-at-risk-to-a-nation-at-hope/>)

American Institutes for Research - student-centered learning can lead to improved academic achievement, particularly for low-income and minority students. The study found that personalized learning environments can lead to a 27 percentile point increase in math



achievement and a 15 percentile point increase in reading achievement.

<https://www.air.org/sites/default/files/downloads/report/Student-Centered-Learning-Report.pdf> (<https://www.air.org/sites/default/files/downloads/report/Student-Centered-Learning-Report.pdf>)

Education Commission of the States - competency-based education can help students who have fallen behind to catch up to their peers. The study found that competency-based education can provide students with the opportunity to learn at their own pace, which can be particularly beneficial for students who struggle with traditional classroom instruction.

<https://www.ecs.org/wp-content/uploads/Competency-Based-Education.pdf> (<https://www.ecs.org/wp-content/uploads/Competency-Based-Education.pdf>)

Learning Policy Institute - providing students with a supportive and engaging learning environment can lead to improved academic outcomes. The Institute's research has shown that social-emotional learning programs can lead to a variety of positive outcomes, including improved academic achievement, better attendance, and reduced disciplinary incidents.

https://learningpolicyinstitute.org/sites/default/files/product-files/Social_Emotional_Learning_Brief_FULL.pdf (https://learningpolicyinstitute.org/sites/default/files/product-files/Social_Emotional_Learning_Brief_FULL.pdf)

Q103. 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.



Carolina Achieve's will utilize best practices in instructional strategies, including but not limited to differentiated instruction, varied group sizes (whole-class, small group, team, and individual), and inquiry-based learning. These instructional strategies, along with the ones outlined below, directly support a learner-centered, competency-based school that sets high expectations for all students and provides the necessary support to ensure their achievement and growth.

Teachers at Carolina Achieve will implement best practices from the book, *The New Classroom Instruction that Works*, by Bryan Goodwin and Kristin Rouleau. As stated on the ASCD website, this book is "built on a more rigorous research base and updated to emphasize student diversity, equity, and inclusion, *The New Classroom Instruction That Works* offers a streamlined focus on the 14 instructional strategies proven to promote deep, meaningful, and lasting learning. These strategies—all of which are effective and complementary—are presented within a framework geared toward instructional planning and aligned with how the brain learns. Below outlines how each of the 14 strategies will result in increased academic achievement for all students in elementary and middle school, including students from historically and persistently marginalized and excluded groups that are not being served adequately in traditional Orange and Durham County public schools.

- Cognitive interest cues: These cues, such as presenting surprising or intriguing information, can increase student engagement and motivation, which can lead to improved academic achievement. A study by Hidi and Renninger (2006) found that providing cognitive interest cues, such as highlighting interesting aspects of a topic, can increase students' interest and engagement, which can lead to improved academic achievement.

<https://www.tandfonline.com/doi/abs/10.1080/00405841.2014.918825> (<https://www.tandfonline.com/doi/abs/10.1080/00405841.2014.918825>)

<https://journals.sagepub.com/doi/10.1177/0022487110386387> (<https://journals.sagepub.com/doi/10.1177/0022487110386387>)

- Student goal setting and monitoring: When students set goals and monitor their progress, they take ownership of their learning and are more likely to achieve their goals. According to a meta-analysis by Hattie and Timperley (2007), goal setting and monitoring can have a significant positive effect on student achievement.

<https://journals.sagepub.com/doi/abs/10.3102/0034654319853038> (<https://journals.sagepub.com/doi/abs/10.3102/0034654319853038>)

https://www.tandfonline.com/doi/abs/10.1207/s15326985ep4102_4 (https://www.tandfonline.com/doi/abs/10.1207/s15326985ep4102_4)

- Vocabulary instruction: Explicit instruction of vocabulary can improve reading comprehension and academic achievement, especially for students from historically and persistently marginalized and excluded groups who may have limited vocabulary exposure. A study by McKeown et al. (1985) found that explicit vocabulary instruction improved students' reading comprehension.

<https://journals.sagepub.com/doi/abs/10.3102/00346543074001003> (<https://journals.sagepub.com/doi/abs/10.3102/00346543074001003>)

<https://www.tandfonline.com/doi/abs/10.1080/1047840X.2018.1436209> (<https://www.tandfonline.com/doi/abs/10.1080/1047840X.2018.1436209>)

- Strategy instruction and modeling: Explicit instruction and modeling of cognitive and metacognitive strategies, such as summarizing or self-questioning, can help students better understand and apply content knowledge. A meta-analysis by Swanson and Hoskyn (1998) found that teaching students specific learning strategies can improve academic achievement.

<https://www.tandfonline.com/doi/abs/10.1080/1047840X.2017.1380084> (<https://www.tandfonline.com/doi/abs/10.1080/1047840X.2017.1380084>)

<https://link.springer.com/article/10.1007/s11858-015-0728-6> (<https://link.springer.com/article/10.1007/s11858-015-0728-6>)

- Visualizations and concrete examples: Providing visualizations and concrete examples can help students better understand abstract concepts, especially for students who may struggle with abstract thinking. A study by Mayer and Sims (1994) found that using visualizations and concrete examples can improve students' understanding and retention of complex concepts.



<https://www.pnas.org/content/111/23/8237.short> (<https://www.pnas.org/content/111/23/8237.short>)

<https://www.tandfonline.com/doi/abs/10.1080/00986283.2019.1589999> (<https://www.tandfonline.com/doi/abs/10.1080/00986283.2019.1589999>)

- High-level questions and student explanations: Asking high-level questions and encouraging students to explain their thinking can deepen their understanding of content and improve academic achievement. According to a meta-analysis by Rosenshine (2012), asking high-level questions and encouraging students to explain their thinking can lead to improved academic achievement.

<https://www.tandfonline.com/doi/abs/10.1080/00405841.2017.1319593> (<https://www.tandfonline.com/doi/abs/10.1080/00405841.2017.1319593>)

<https://journals.sagepub.com/doi/10.3102/00346543074001011> (<https://journals.sagepub.com/doi/10.3102/00346543074001011>)

- Guided initial application with formative feedback: Providing guided practice and immediate feedback can help students better understand and apply new knowledge. A study by Black and Wiliam (1998) found that providing formative feedback during guided initial application can improve student achievement.

<https://www.sciencedirect.com/science/article/pii/S0959475215000422> (<https://www.sciencedirect.com/science/article/pii/S0959475215000422>)

<https://www.tandfonline.com/doi/abs/10.1080/19404158.2013.851540> (<https://www.tandfonline.com/doi/abs/10.1080/19404158.2013.851540>)

- Peer-assisted consolidation of learning: Peer-assisted learning, such as peer tutoring or collaborative learning, can help students consolidate their learning and deepen their understanding of content. According to a meta-analysis by Roseth et al. (2008), peer-assisted learning can lead to improved academic achievement.

<https://journals.sagepub.com/doi/abs/10.1177/001316448505500402> (<https://journals.sagepub.com/doi/abs/10.1177/001316448505500402>)

<https://www.tandfonline.com/doi/abs/10.1080/00220973.2017.1307784> (<https://www.tandfonline.com/doi/abs/10.1080/00220973.2017.1307784>)

- Retrieval practice: Retrieval practice, such as quizzing or recall exercises, can strengthen long-term memory and improve academic achievement. A study by Roediger and Karpicke (2006) found that retrieval practice, or recalling information from memory, can improve long-term retention and academic achievement.

<https://www.sciencedirect.com/science/article/pii/S2211368115000682> (<https://www.sciencedirect.com/science/article/pii/S2211368115000682>)

<https://psycnet.apa.org/record/2019-01447-001> (<https://psycnet.apa.org/record/2019-01447-001>)

- Spaced and mixed independent practice: Providing spaced and mixed independent practice can improve retention and transfer of learning, leading to improved academic achievement. A study by Cepeda et al. (2006) found that spaced and mixed independent practice can lead to improved academic achievement.

<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6277649/> (<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6277649/>)

<https://www.tandfonline.com/doi/abs/10.1080/02783193.2018.1517153> (<https://www.tandfonline.com/doi/abs/10.1080/02783193.2018.1517153>)

- Targeted support: Providing targeted support, such as additional instruction or resources, can help students who may struggle with certain concepts or skills. A study by Shih et al. (2015) found that providing targeted support, such as one-on-one tutoring, can improve academic achievement for students who are struggling.

<https://journals.sagepub.com/doi/abs/10.1177/001316448605500304> (<https://journals.sagepub.com/doi/abs/10.1177/001316448605500304>)



<https://journals.sagepub.com/doi/abs/10.3102/00346543074001020> (<https://journals.sagepub.com/doi/abs/10.3102/00346543074001020>)

- Cognitive writing: Encouraging students to write about their thinking processes and content knowledge can deepen their understanding and improve academic achievement. A study by Graham and Hebert (2010) found that teaching cognitive writing strategies, such as planning and revising, can improve students' writing achievement.

<https://journals.sagepub.com/doi/abs/10.3102/00346543074001038> (<https://journals.sagepub.com/doi/abs/10.3102/00346543074001038>)

<https://www.tandfonline.com/doi/abs/10.1080/1047840X.2013.767190> (<https://www.tandfonline.com/doi/abs/10.1080/1047840X.2013.767190>)

- Guided investigations: Guided investigations, such as inquiry-based learning, can help students develop critical thinking and problem-solving skills. According to a meta-analysis by Lawson et al. (2010), guided investigations can lead to improved academic achievement in science.

<https://www.tandfonline.com/doi/abs/10.1080/10508406.2016> (<https://www.tandfonline.com/doi/abs/10.1080/10508406.2016>)

- Structured problem-solving: Providing structured problem-solving opportunities can help students develop problem-solving skills and transfer learning to new situations. A study by VanLehn et al. (2005) found that teaching structured problem-solving can lead to improved academic achievement in mathematics.

<https://www.sciencedirect.com/science/article/pii/S0360131504001288> (<https://www.sciencedirect.com/science/article/pii/S0360131504001288>)

Q104. 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.

Carolina Achieve's proposed instructional plan and graduation requirements will ensure readiness to transition from grade to grade and to the next grade span upon program completion because of their focus on individual student academic progress and personal growth in order to build a strong academic foundation while setting high expectations for both learning and well-being. The learner-centered and competency-based instructional program focuses on the mastery of content and skills, rather than just memorization and test-taking. Through authentic and meaningful learning experiences, it promotes a growth mindset and emphasizes the value of effort, persistence, and hard work, as increases agency and engagement. The academic aspect of the program is balanced with a focus on well-being through carefully crafted social and emotional learning opportunities. Attention to their well-being and personal growth, as well as their academic achievement, enables students to develop the Habits of Success needed to achieve their scholastic, personal, and professional goals.

All students will receive a superior level of support from their Success Coach which is unprecedented in most schools, including monitoring academic and personal growth, and effective and frequent communication between the school and the student's family. This support ensures that students receive the individualized support that they need in order to achieve their academic and personal growth goals. Students and their Success Coaches meet multiple times a day to reflect on their progress and plan for the following class periods and school days. Success Coaches get to know their students both academically and personally, which goes above and beyond the responsibilities of a traditional homeroom teacher or advisor. The Student Success System can act like an early warning system to address the needs of students and provide support before more intensive interventions are needed. The relationships that are built through the Student Success System help to anchor the student, whether they are performing at-grade level or at-risk, as they work toward achieving competency-based based and grade level academic achievement, ultimately working toward 8th grade exit standards. The chances of students who are on-grade level or at-risk successfully meeting the requirements to graduate 8th grade dramatically increase when they feel connected to the school community and are invested in their own learning.

Q105. Describe in a brief narrative how the yearly academic calendar coincides with the tenets of the proposed mission and education plan.



Carolina Achieve will follow an extended traditional academic calendar. The extended calendar ensures that our students are meeting the required instructional hours for the school year and that teachers and staff are working the required number of days, as well as aligning with the Orange County major school break schedule. After the first year, Carolina Achieve will move to a year-round schedule. The initial hybrid schedule allows for students and educators to have a more traditional summer break before starting at Carolina Achieve. It also provides the opportunity for an extended on-boarding process for students, educators, and families during the first year to ensure the development of the school program and culture. Carolina Achieve's extended calendar best supports the learner-centered model. It will allow teachers and students the opportunity to utilize the designated days between each quarter to reflect on student academic and personal growth and achievement to plan and adjust the curriculum and individual learning pathways. The ability to reflect on growth and achievement and then incorporate that into the plan for the next quarter.

Q106. 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.

Carolina Achieve will operate on the same general schedule every day with some rotations for special classes and meetings. This type of schedule provides students, teachers, and parents with consistency. Elementary students, students with learning differences, students with different abilities, and neurodiverse students thrive academically and personally when they know what to expect and can prepare mentally and physically to meet those expectations.

As the school continues to grow, teachers and students will collaborate to make the changes necessary to ensure that the schedule is aligned with the Four Roots, is learner-centered, and meets the needs of the school's diverse student population.

School day: 8 am - 3:30 pm

Instructional Minutes/Day for core subjects:

K - 5

English Language Arts - 90 min

Mathematics - 90 min

Science - 30 min

Social Studies - 30 min

6 - 8

English Language Arts - 60 min

Mathematics - 60 min

Science - 60 min

Social Studies - 60 min

The Carolina Achieve Yearly Academic Calendar exceeds the minimum of 1,025 instructional hours.

Q107. Describe a typical day for a teacher and a student in the school's first year of operation.



A Day in the Life of a Carolina Achieve Student

7:45 am

The student arrives at school on the school bus and is greeted by some of their teachers and the Head of School outside of the school building. Once inside the school building the student walks through the hallways that are decorated with student learning. The student goes directly to their Success Team meeting room to drop off their backpack and get ready for the morning meeting. Their Success Coach greets them at the door. They quickly grab some breakfast that is available and chat with some of their friends before getting ready for the day.

8:00 am

Morning meeting sets the tone for the day and is a daily opportunity for a student to recommit to their academic and personal learning journey and goals set in the matriculation oath. Students gather in a circle in the center of the room. The teacher leads the students in the morning greeting and then gives students opportunities to share something with one another. Today, the student decides that they want to share that their team finally won a basketball game last night. The student knows that everyone will be excited for them because they know how hard the student and their team have worked to win. After everyone shares the students then work on an empathy activity in pairs. They are working on active listening strategies to help them on their academic and personal growth learning journeys. Before the morning meeting is over, the students brainstorm as a class why empathy, one of the school's Habits of Success is important in their daily lives and how being a better listener can help them achieve their goals.

8:30 am

The student gets out their work and prepares for small group instruction in math. They take a quick formative assessment that helps determine which small instruction group they will be a member of for the math block. The student participates in small group instruction with the teacher and then rotates to continue to work with their group without the teacher. For the third rotation, the student works independently to practice their skills. At the end of the class block, the student takes a check for understanding and turns it into their teacher.

10:00 am

The student heads outside for recess. This is a time for free play and the student has the opportunity to play on the playground, courts, or fields. The student wants to practice free throws so they head over to the courts to work with other members of their basketball team.

10:30 am

The student starts their literacy block in a small group with their teacher. The student starts out independently reading. After 20 minutes, the student then works with their peer conference partner to go over the editing checklist on the recent draft of their poetry. Then for the final 20 minutes, the student joins their small group to compare two different poems. At the end of their class block, the student completes a reflection on their poetry discussion.

11:30 am

The student has lunch with their Success Team. They are excited to continue the game of Scrabble the team started the day before and continue the conversation from earlier in the morning about empathy.

12:30 pm

The student has Studio. Currently, they are in the middle of a unit where they are working to solve the problem of invasive species in the



area that are killing indigenous species. The student and their team are trying to figure out a way to stop the invasive species from reproducing, so they are in the research phase. The teacher is reviewing the student team's email that they want to send to a local expert to ask for help and participate in a virtual field trip.

1:30 pm

The student goes to their enrichment class. Today's class is Art and they are working on self-portraits. Over the last few weeks, the students have been studying many different artists and then making self-portraits in the styles of various artists. They are studying Picasso right now and the students are using pastels to make their portraits.

2:30 pm

The student goes back to their Success Team meeting room for Power Hour. They take out their computer to review the meeting that they had with their Success Coach the other day and start working through their chart for that hour. The chart includes both individual times working on IXL and time for the student to work with their partner on a Studio project.

3:30 pm

The student packs up their backpack, says goodbye to their friends and Success Coach, and then walks down the hall to their bus. On the way out of the school, another teacher, that they do not have, gives them a high five because they hear that the student won their basketball game yesterday. The student gets on the bus and sits next to their friends as they head home.

A Day in the Life of a Carolina Achieve Teacher

7:30 am

The teacher arrives at school and checks in with their grade-level colleagues. They go over any plans for the day, including the new literacy groups based on the data and observations from the previous academic quarter. The teacher then heads to their classroom to greet students in their Success Team.

8:00 am

The teacher greets their Student Success Team and starts the morning meeting. During this time the teacher takes students through the process of greeting, sharing, activity, and connection to the Habits of Success.

8:30 am

The teacher begins the mathematics block. The class starts off with students taking a formative assessment that will guide the teacher in providing instruction for the day and determine which groups students will be in for small group work. After the mini-lesson, the teacher then rotates through working with small groups to support their learning. The assistant teacher is able to work with individual students who need targeted instruction and support.

10:00 am

The teacher has a break while the students are at recess. They are able to take a brief walk outside the school building or conduct personal business.



10:30 am

The teacher begins their literacy block with their students and the assistant teacher. After setting the students up for success by explaining the plan for the class period. The teacher then begins to work with the first small group of students using direct instruction and then rotates through each group throughout the period. While the teacher is working with small groups, the assistant teacher is able to offer targeted support to individual students. At the end of the class, the teacher brings all of the students together to reflect on their learning and prepare them for the next class period.

11:30 am

The teacher has lunch with their Student Success Team. During lunch, the teacher helps facilitate conversations and provides opportunities to practice Habits of Success. The teacher is able to identify and help students that may be struggling with mental health, interpersonal, or physical issues, as well as encourage positive interactions between students.

12:30 pm

The teacher starts the Studio class block. During this time students engage in real-world problem-solving connected to science and social studies. The students are in the middle of a unit and they are working in their teams to solve the problems. After the initial whole class lesson, the teacher then works with the different teams to provide support and guidance through the process.

1:30 pm

The teacher has a planning period. The time will be divided between two activities. The first will be time to review data with other teachers in the same grade level. They will use the Data Wise protocols to guide them through the process. After they review the data, the teacher will participate in instructional rounds, where they will visit another teacher's classroom to observe. The teacher will be providing the teacher that they observed with feedback following the "I see, I hear, I think, I wonder" protocol. On their way back to their classroom, they stop in the central hallway to chat with the Head of School, who working is at their standing desk, to chat about their student-led conference in the afternoon.

2:30 pm

The teacher has four 15-minute individual conferences with students in their Success Team. These conferences are to help students reflect on their learning and growth from the previous academic quarter and help them create a learning plan for the new academic quarter that they will present to their families at student-led conferences.

3:30 pm

After the teacher has helped their students get to their afternoon transportation or after-school activity, the teacher has a scheduled meeting with one of the students in the Success Team and that student's family. This meeting is a student-led conference to celebrate the student's growth over the last academic quarter and to set new goals for the next quarter. The student has worked with the teacher to prepare for the meeting, so the teacher is there to support and advocate for the plan that the student has designed. The Head of School stops by at the end of the meeting to say hi to everyone.

4:30 pm

The teacher packs up for the afternoon and walks out of the building with their colleagues.



Q108. Will this proposed school include a high school?

- Yes
- No

Q114. **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 Final.pdf

Uploaded on **4/27/2023** by
Lauren Watters

Q115. **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 Comments :

The Carolina Achieve Yearly Academic Calendar exceeds the minimum of 1,025 instructional hours.

Applicant Evidence :


Appendix D Final.pdf

Uploaded on **4/19/2023** by
Lauren Watters

Q116. **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 Final.pdf

Uploaded on **4/20/2023** by
Lauren Watters

9.2. Special Populations and "At-Risk" Students

Q117. 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.



Carolina Achieve's student intervention and prevention programs will encompass five characteristics that will be implemented from the moment a student enrolls at Carolina Achieve until they complete their studies. Collaborating with EC teachers and the Success Coaches, students and parents will ensure that the school provides the essential programs, strategies, and support required for academic and personal growth.

The first key characteristic involves formative assessment data collection and analysis to ensure that students are being taught at the appropriate level, demonstrating progress, and mastering concepts.

The second characteristic involves the use of common benchmark assessment programs, such as Building 21's competencies and continua frame and NWEA MAP to determine student growth and guide future instruction.

The third key characteristic focuses on having a clear identification process for student remediation.

The fourth key characteristic entails providing built-in additional instructional time for student remediation in literacy, math, and reading skills during Power Hour each day (see section 9.1).

The final key characteristic involves frequent monitoring and accountability for teacher instructional practices, as the school will implement the Data Wise Improvement Process.

Q118. 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.

Carolina Achieve board member, MaKayla Booker, has worked with children and individuals ranging from ages 2-20 years old with disabilities for over 7 years. In recent years, MaKayla has held a Registered Behavior Technician Licensure since 2018. Since then MaKayla has worked with various individuals on the Autism spectrum. While practicing Applied Behavior Analysis MaKayla has worked with clients who are non-verbal, highly aggressive, experiencing extremely maladaptive behaviors, and clients with a low tolerance for social interaction. As a behavioral therapist, MaKayla works to assist clients with increasing socially significant behaviors and improving skills by focusing on behavior change practices. In this scope of work, MaKayla not only focuses on just reducing maladaptive behaviors but also teaching and reinforcing skills that are needed for clients to live as independently as possible. MaKayla has over 5 years of experience in data collection and 3 years of experience conducting assessments and psychological testing, writing behavior plans including Behavior Intervention Plans (BIP), and providing educational support for developing Individual Education Plans (IEP), and 504 Plans for students with special needs.

Carolina Achieve also will be working with Bridge Prep Charter (NY) to navigate through the Ready to Open requirements and school planning. Bridge Prep exists so all students with language-based learning differences, such as dyslexia, and their families have a public school option that meets their needs within their community. The school will also consult local experts to ensure that the school is following best practices for special populations and is compliant with North Carolina requirements.

Q119. 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.**



Identification and Enrollment of English Language Learners:

Upon enrollment, parents will receive a Home Language Survey. If parents indicate that English is an additional language in the home, or if they answer yes to any of the determining questions, the student will be referred to the ELL liaison for testing. If a student has not been previously identified as ELL, the WIDA Access Placement Test (W-APT) will be administered. If a student has been previously identified as ELL, Carolina Achieve staff will provide appropriate instructional plans based on the student's proficiency level. The school will employ a system of checks to ensure that students are not misidentified.

Instructional Program:

Carolina Achieve will determine the appropriate means of instruction, modification, or accommodations for ELL students based on a review of the student's academic records, ELL placement tests, parent input, student input, student observations, and other relevant data. ELL students will be held accountable for achieving the same challenging English proficiency objectives and standards required of all other students. Amplify will provide teachers with ELL lesson plans to align with their students' individual needs. Additionally, Carolina Achieve will employ the necessary faculty and staff to ensure appropriate curricular materials and supplemental resources needed to help ELL learners become proficient in English are present in the classroom, such as Web-based programs like monolingual/bilingual dictionaries, grammar tools, audio support, and supplementary print coursework. Students are able to receive additional support within class periods and during Power Hour every afternoon.

Communication with Parents:

Carolina Achieve aims to communicate with parents in their primary language, to the extent possible, to ensure compliance with state and federal guidelines for ELL students and disseminate information properly. The Success Coach will be a parent's main point of contact at the school and the Success Coach will be provided with the resources needed to communicate effectively with all students' parents.

Exit Criteria:

Students who are determined to be fully English proficient based on ACCESS test results will continue to be monitored for a period of two years, as required by state regulations. Parents will be notified and kept informed of monitoring progress by the EC teachers and their child's Success Coach.

ELL Staffing:

Carolina Achieve will have a robust recruiting, hiring, and professional development process to ensure our teachers are equipped to serve our ELL students. The school aims to build partnerships with communities whose primary or secondary language is not English through local programs, local colleges, and universities, in order to hire support and expertise. Some of these resources will be at the school and others will rely on community partnerships with local organizations, such as El Centro Hispano.

Q120. 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.



Carolina Achieve recognizes that identifying gifted and talented students requires a comprehensive approach that considers various factors. This includes teacher recommendations, student portfolio work, parental input, and specialized testing.

Although Amplify provides access to challenging content for all students, Carolina Achieve understands that additional experiences may be necessary to ensure all students are met at their instructional levels. High-performing students will have access to individualization and differentiation to experience content at their instructional level. This will happen during the class periods and every day during Power Hour. Lessons will be differentiated based on students' needs and implemented accordingly.

The school is committed to ensuring that academically gifted students are properly served. Classroom teachers will collaborate with Success Coaches to provide differentiation and extended learning through personalized learning plans that will challenge these students in all areas. The school will take an individual approach to meet the needs of the gifted and talented students and hire the necessary faculty to ensure that each student reaches their maximum potential. The progress of these students will be measured through data from testing, as well as through portfolio work and anecdotal evidence.

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.

Q121. 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.

Upon enrollment, all students' records will be reviewed by Carolina Achieve's EC team to identify those who have previously been eligible for special education services or are protected under Section 504 of the Rehabilitation Act. This process ensures that students previously diagnosed with disabilities and eligible under Section 504 and/or Individual Education plans are identified. The EC team will contact the previous school in writing and by telephone to request the current IEP, all historical IEP records, and pertinent student information. If there are delays in receiving the requested IEP records, additional requests will be made, and a time will be scheduled for the EC teacher and/or head of school to pick up the files. The school head of school may email the district if additional delays occur.

Moreover, the school will conduct informal assessments, check-ins, and placement assessments at the beginning of each school year to identify newly enrolled students' academic levels. Carolina Achieve staff will also communicate with the previous school attended by special education students regarding special accommodations and follow through with previously written plans until Carolina Achieve is able to conduct its own evaluations of these students, adopt the most current IEP, or develop a new IEP, following the transfer provisions of NC 1504- 4.4(e) and (f).

Carolina Achieve will comply with all federal mandates of the Individuals with Disabilities Education Act and the regulations of the North Carolina Public School Law, Article 9, regarding special education and related services. To ensure record compliance, a compliance monitoring system will be developed and implemented, and the school head of school and EC teacher(s) will complete a compliance checklist for all records of students with disabilities. Corrective action will take place immediately for each record identified with noncompliance during the record review process. The verification of each correction will be the final action to ensure noncompliance is corrected. The 504 Coordinator at Carolina Achieve will oversee and monitor the 504 Accommodation plans compliance as required by Section 504 of the Rehabilitation Act of 1973.

Q122. Provide the process for identifying students who may be eligible for special education services as identified in the federal 'Child Find' mandate. Be sure to include how student evaluations and assessments will be completed. Include how the school will avoid misidentification of special education students.



Carolina Achieve will provide resources to help teachers, parents, and staff identify children with special needs, including brochures, posters, and letters available on the Public Schools of North Carolina Department of Public Instruction Project Child Find's website.

The Exceptional Children's (EC) team, led by the EC teacher, will use a problem-solving approach and review progress monitoring records to address the academic, behavioral, and developmental concerns of students. The team will document the data collected, monitor intervention results, and make data-based decisions. If evaluations are deemed necessary, the parent(s) will give initial evaluation consent, and the EC teacher will oversee the evaluation process, ensuring compliance with the 90-day timeline. North Carolina Department of Public Instruction forms will be used to document the evaluation and Individualized Education Plan (IEP). Confidential records will be kept in a locked file cabinet accessible only to relevant school personnel, with written documentation required for removing any records.

Carolina Achieve will implement a three-tiered approach to prevent the misidentification of students, following North Carolina's Multi-tiered System of Support and utilizing the school's Student Success System. If students are not showing progress through the approach, a team decision will be made for full evaluations and specialized instruction.

Q123. 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)**

Carolina Achieve will establish a system to monitor record compliance and ensure all records of students with disabilities are reviewed for compliance by the EC team using a compliance checklist. Immediate corrective action will be taken for any noncompliance found, with verification of correction being the final action. Additionally, all EC records will be audited at least once a year to ensure they contain signed informed consent for services, the most current prior written notice, documentation of initial consent to evaluate, the most recent parent invitation to the IEP meeting, and the most recent IEP/re-evaluation document.

Furthermore, contracted specialists will conduct annual audits of IEPs to evaluate the appropriateness of the present level of performance, IEP goals, student participation in statewide assessments, and IEP service time.

The Carolina Achieve 504 Coordinator will also monitor all 504 Accommodation plans for compliance with Section 504 of the Rehabilitation Act of 1973.

Carolina Achieve will train all staff in confidentiality and effective record keeping, work with prior schools to ensure records are complete and timely, and review and reflect on record-keeping processes annually.

All records will be kept in a separate, locked setting, marked as confidential, and not to leave the school building. Policies and procedures will be established for maintaining copies of records and filing records in compliance with current laws. The ultimate goal is for Carolina Achieve to achieve 100% compliance with all records.

Q124. 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.



Carolina Achieve is committed to providing all students with an inclusive education, including those with severe or multiple disabilities. The EC team will utilize various data collection methods, teacher observations, and parent input to identify appropriate accommodations and modifications that enable students to access the general education curriculum. Weekly meetings between the EC and general education teachers will be held to identify appropriate differentiated instructional methods for all EC students. Lessons will be designed to accommodate the needs of all learners, with a focus on aligning IEP goals with instruction and curriculum.

To comply with Federal and State regulations, Carolina Achieve will make several commitments, including open enrollment for all children, regardless of disability status; provision of assistive technology devices/services; placement in the least restrictive environment with an IEP team; obtaining parent consent for initial evaluations and reevaluations; and ensuring appropriate placement within 90 calendar days of referral.

Exceptional children will follow the same grade-level curriculum as their non-exceptional peers, with a focus on instructional needs. Additional educational opportunities will be provided for exceptional children, such as extended time, one-on-one teaching, highly qualified staff, extended school year programs, individualized instruction, tutoring, and small group instruction. The school will admit all students regardless of intellectual ability, measures of achievement or aptitude, athletic ability, disability, race, creed, gender, national origin, religion, or ancestry.

Each child with special needs will have an IEP team consisting of the parents, the child's Success Coach, a regular education teacher, a special education teacher, the child (if appropriate), a representative of the public agency, and other individuals as needed. The IEP will be implemented in the least restrictive environment unless the child's education cannot be accomplished satisfactorily, in which case the child may be removed from their regular educational environment. Carolina Achieve will continually strive to provide all students with a high-quality and exceptional education while adhering to all applicable laws and regulations.

Q125. 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?



Carolina Achieve will provide educational opportunities to students with disabilities in the least restrictive environment with the full continuum of alternative placements, as appropriate. The school anticipates that 10% of the student population will require EC services which will be planned for accordingly. However, the entire EC population will not need direct service delivery. The school aims to hire one Exceptional Children's teacher on staff, depending on school enrollment, based on every 15 or so students with disabilities, depending on the continuum of services required. In the event more support staff is needed, Carolina Achieve will advertise and hire highly qualified EC staff to support the needs of students. Carolina Achieve will utilize IDEA money as well as state and local funds to support these positions.

The EC teacher will be responsible for implementing IEPs and monitoring students' progress. Classrooms will be equipped with the necessary materials to ensure access to the curriculum.

Quarterly, the EC teacher will meet with the student's Success Coach and classroom teacher(s) to discuss progress and determine if a parental meeting is necessary. Yearly, parents, the EC teacher, the Success Coach, one regular education teacher, a school administrator, and an individual who can interpret any evaluation data will meet to review the student's IEP, and to make any necessary changes or recommendations. Parents may request an IEP meeting at any time.

The school will ensure that all students with disabilities have access to free and appropriate public education. Carolina Achieve will focus on their special education and related services needed in order to ensure that they acquire the best possible education and are being prepared for further education, employment, and independent living. The school will follow all federal and state laws and regulations relating to the education of students with disabilities. All staff will be educated as to the contents and implications of these laws through continuous professional learning opportunities. These professional learning opportunities will be identified and implemented by the school administration and EC staff utilizing feedback from staff surveys, teacher input, student assessment data, IEP goal data collection, and parent input.

The Exceptional Children's teacher will be responsible for monitoring the implementation of all IEPs. The EC teacher will work collaboratively with all teachers in weekly meetings to ensure the appropriate collaborative learning strategies are utilized in each lesson. Students will receive quarterly IEP progress reports from the EC teacher and all related service providers relevant to each individual student. These progress reports will also be stored in each student's IEP folder to ensure compliance and assist in future decision-making. The IEP team will meet at least once a year for each EC student to conduct an annual review meeting to update each student's IEP based on specific data and input from all IEP team members. Additional meetings will be scheduled as a student's needs change. As a student is identified, a transition meeting will take place to ensure that all accommodations are communicated to the relevant teachers.

Discipline of EC Students

Students with disabilities are protected by federal and state laws, and cannot be excluded from their educational program without following the proper procedures. It is crucial to address student behavior early on to prevent misbehavior and to provide appropriate behavioral intervention plans and goals through the IEP process.

In accordance with federal regulations, students with disabilities cannot be suspended from school for more than 10 days in a school year without following specific procedures. After day 10, services must be provided, and the IEP team must meet to determine if a manifestation determination has occurred.

Schools should prioritize intervening with student behavior in the school setting. Repeated problematic behavior should be addressed early through the IEP process. Teams should conduct a Functional Behavior Analysis (FBA) to analyze the behavior and develop a Behavior Intervention Plan (BIP) and/or behavioral goals. Suspension should always be a last resort and used sparingly, as it rarely improves behavior.

Change of Placement

If a student is removed for disciplinary reasons for more than 10 consecutive school days or subjected to a pattern of removals totaling



more than 10 school days in a school year, it constitutes a change in placement. When this occurs, the LEA must notify parents of the decision and provide due process as outlined in the Parent Handbook. Within 10 school days, a manifestation determination must be completed, and an FBA and BIP should be reviewed or created if necessary.

It is important to note that changes in special education placements are not the same as suspensions. Any change in special education placement must be documented on the IEP (DEC 4) through an amendment or a new IEP (re-evaluation), as well as on the DEC 5 (Prior Written Notice). When a special education placement changes through the IEP process (e.g., to modified day or homebound), the new placement is not considered a school removal and is not counted as a suspension.

If a student's behavior warrants a change in placement, the IEP team will consider appropriate options, such as separate to modified day, regular to homebound services, homebound services to regular, or separate to regular (when students are placed from a program back to the general education classroom). The same staffing process (DEC 5 and IEP addendum) will be required for the student to return to the original placement when appropriate.

Manifestation Determination

The IEP team responsible for the student must complete the manifestation determination within 10 school days of a change of placement resulting from removal. They should examine all pertinent information available, including the student's IEP, observations, and input from parents, to determine if the behavior was a result of the student's disability.

To reach a decision, the team should consider:

- Whether the conduct was caused by the student's disability
- If the LEA failed to implement the IEP, which resulted in the conduct

If it is determined that the behavior was not a manifestation of the disability or a result of the LEA's failure to implement the IEP, the school can apply the same disciplinary procedures as they would with any other student. However, if the behavior is a manifestation of the student's disability, the team must conduct a review of the student's behavior intervention plan (BIP) and make any necessary adjustments to prevent future incidents.

Day 11 Requirements

Starting from the 11th day of removal, it is mandatory for the school to provide services to the student. The type of service and who determines it depends on the contents of the IEP, whether there has been a change of placement for disciplinary reasons, and the results of any manifestation determination.

In case of a change of placement for disciplinary reasons, the school must take the following steps:

- Send the DEC5a, Parent Handbook, and Invitation on the day of the incident.
- Conduct a Manifestation Determination.

If the behavior is not a manifestation of the disability based on the Manifestation Determination, the student may be suspended similarly to a general education student. On the other hand, if the behavior is a manifestation of the disability, the student must be returned to the placement from which the student was removed, unless the parent and school agree to a change of placement.

Additionally, the school must conduct a Functional Behavioral Assessment (FBA) unless it is already completed (current IEP and current school year). If completed, it should be reviewed as needed (DPI recommends after about each 5th day of removal). Furthermore, the school must develop a Behavior Intervention Plan (BIP) designed to address the behavior violation. If the BIP has already been developed, it should be reviewed and modified as necessary to address the behavior (DPI recommends after about each 5th day of removal).

Weapons/Drugs/Serious Bodily Injury

When a student violates Carolina Achieve's school policies regarding weapons, drugs, or causes serious bodily harm, the school must follow the same 11-day procedure as with other disciplinary violations. However, if the manifestation determination shows a relationship



between the behavior and the student's disability, the head of school may remove the student to an alternative setting for up to 45 school days. If the behavior is not related to the disability, the student may be removed similarly to a non-disabled student. In either case, the IEP team must conduct a manifestation determination, FBA, BIP, and provide services as defined in the IEP. It is important to note that the standard for serious bodily injury is very high and clearly defined.

Functional Behavioral Assessment

To address behavior difficulties in students with special needs, Carolina Achieve must conduct a Functional Behavior Assessment (FBA) for all students. An FBA is required if there is a change in placement for disciplinary reasons. If an FBA has already been developed, it should be reviewed and modified as needed to address the behavior.

Carolina Achieve will take a proactive approach and conduct an FBA before the student reaches the 10th day of removal. If a disciplinary change in placement occurs and an FBA has already been completed, a new FBA is not necessary for each subsequent removal. However, the FBA should be reviewed regularly to ensure it remains relevant and effective.

Behavioral Intervention Plan

For students with special needs who have difficulties with behavior, it is necessary to develop a Behavior Intervention Plan (BIP), which is required if there is a change of placement for disciplinary reasons. If a BIP has already been developed, it should be reviewed and modified as needed to address the behavior.

Developing a BIP as part of the student's Individualized Education Program (IEP) is a practical way to address repetitive and inappropriate behavior. Even if the behavior is not deemed related to the disability, it is recommended to have a behavioral plan in place for any student with special needs who is struggling with behavior.

Q126. Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).

Carolina Achieve is committed to providing free and appropriate public education to all students, including those with disabilities. The Exceptional Children's program will be fully staffed to meet the needs of every child on campus. The school will ensure that all related services are available to students from the first day of instruction, and instructional resources and assistive technology devices are identified and ready for student use.

The school will train all staff on the federal requirements of IDEA and ensure they understand their responsibility to meet the needs of all children. Additionally, the school will also contract with related service providers to ensure that all students receive the services they need and that administrators and key staff are fully trained through the process.

Under IDEA, students with disabilities are educated alongside their non-disabled peers to the maximum extent appropriate. The school will prioritize ensuring that students spend as much time as possible in a general education classroom with their non-disabled peers, with the provision of supplementary aids and services as needed. These aids may include accommodations and modifications to the curriculum, changes in how content is presented, or alternative methods for measuring progress. Carolina Achieve will also provide direct services and support to the child, as well as training for staff who work with that student. The ultimate goal is to prepare all students, including those with disabilities, for further education, employment, and independent living.

Q127. Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents, and relevant staff.



At Carolina Achieve, the Exceptional Children's teacher will oversee the implementation of all IEPs and ensure that students receive quarterly progress reports and an annual review meeting. Additional meetings will be scheduled as needed based on a student's changing needs. When a student is identified, a transition meeting will take place to ensure that all accommodations are communicated to the relevant teachers.

Classrooms will be equipped with the necessary materials and assistive technology supports to ensure access to the curriculum. The EC staff will participate in weekly meetings to discuss progress, supports, and accommodations, and determine if a parental meeting is necessary to review any portion of a student's support (IEP). The IEP team, which includes parents, the EC teacher, the student's Success Coach, one regular education teacher, a school administrator, and an individual who can interpret any evaluation data, will meet at least once a year to review the student's IEP and make any necessary changes or recommendations. Parents may request an IEP meeting at any time.

To ensure effective collaboration and communication between EC, the Success Coach, and general education teachers, additional training and collaboration opportunities will be provided. As an organization, Carolina Achieve will regularly conduct internal and external audits and compliance checks to strengthen the processes and programming and ensure that they are meeting all relevant requirements and regulations.

Q128. Describe the proposed plan for providing related services and to have qualified staffing adequate for the anticipated special needs population.

Carolina Achieve will contract with qualified related service providers, including occupational therapists, physical therapists, and speech therapists, recognizing that not all of the projected 10% Exceptional Children population will require direct services. Additionally, the school will contract with a school psychologist to ensure expert analysis of all student evaluations. Each year, the school will evaluate the caseload and the effectiveness of the third-party providers, and make any necessary adjustments to ensure that all students are receiving appropriate services.

Collaboratively, the EC teacher will work with all related service providers to create a student support schedule, identify the appropriate location for providing pull-out support, establish lines of communication with parents, collect and enter data, schedule IEP meetings, and oversee the evaluation/re-evaluation process to ensure overall compliance. School administration will ensure that all EC teachers are highly qualified and possess the necessary teaching licensure to meet state requirements.

9.4. Student Performance Standards

Q129. Describe the student performance standards for the school as a whole.

Carolina Achieve will set high expectations for all students in the areas outlined in the mission statement, including but not limited to academic and personal growth and achievement. The students at Carolina Achieve will achieve proficiency rates that exceed the state and LEA's average in reading, math, and science. The school will use the following standards to guide curriculum development and as the basis to measure growth and achievement: North Carolina Standard Course of Study, Next Generation Science Standards, and College, Career, and Civic Life (C3) Framework for Social Studies Standards.

As noted in the goals section, Carolina Achieve will strive to always achieve B or better according to the NC Report Card. To achieve this the school will:

- Work toward maintaining a proficiency level of 70% and exceeding academic growth annually
- Outperform all surrounding traditional public schools by a minimum of 20% on the NC School Report Cards
- 90% percent of graduating eighth-grade students will be prepared to enter high school at the College and Career Ready Level in math and reading
- More than half of Carolina Achieve's graduating 8th graders will have received at least 1 high school credit before entering high school

Q130. 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.



Carolina Achieve will implement a number of evaluation tools and assessments, as stated in section 9.1.

NWEA Growth Reports

Carolina Achieve intends to leverage NWEA MAP testing to gain real-time data and insights. This will be achieved by using the different reports available to all stakeholders. Parents will receive three progress reports, one after the completion of each assessment, to track their child's progress and growth over time. Additionally, these reports will provide parents with a comparison of their child's performance to national norms and their peers at Carolina Achieve. The parents and students will review these reports with the student's Success Coach to create personalized education plans. Personalized education plans (PEPs) will be created based on the test results, and progress in relation to MAP and PEP goals will drive bi-annual teacher/parent conferences.

Daily formative assessments will be combined with NWEA MAP testing to monitor student progress. The resulting data will provide teachers with specific information that will be used to create lessons, develop small groups, and address any gaps in the student's education through the Data Wise School Improvement Process.

Grade-level teams will analyze the reports during their meeting time to review the Learning Continuum and various class reports, and to evaluate student growth. The Head of School will present two key reports to the Board - the District Summary Report and the Projected Proficiency Summary Report. The District Summary Report will provide an overview of the progress of the school as a whole, while the Projected Proficiency Summary Report will project how the students at Carolina Achieve will perform on the North Carolina End of Year State Assessments.

Alignment to North Carolina Testing Program

Carolina Achieve will follow the guidelines of the North Carolina Testing Program, including NC's Operation Polaris 2.0, NC EOGs/EOCs, and Read to Achieve tests. The school will use effective and standards-based teaching practices, including a combination of standardized and school-developed assessments. These assessments include NWEA growth reading and math assessments, NC Check-in in reading and math three times per year for grades K-8, and ongoing evaluations of student mastery on common grade-level standards. This approach enables the school to track student growth, provide early warning feedback, and adjust teaching methods based on student performance. Additionally, Carolina Achieve will incorporate math assessments and tasks available through NCDPI curriculum. To support competency-based learning and assessment, the school will use Building 21's competencies and continua as a framework (see attachment for an example of Building 21's competencies and continua).

Data Analysis and Evaluation of Assessment

The school's assessment system will also include formative, baseline, and summative evaluations. The data gathered from these assessments will be used to develop Personalized Learning Plans and Student Success Plans to ensure students are progressing toward mastering the required standards. They will analyze the data in a timely manner to determine action steps for student improvement and to make adjustments to school-wide initiatives using the Data Wise School Improvement Process (see attachment for more information).

Read of Achieve

Carolina Achieve will offer a summer reading camp for 3rd-grade students who do not pass the 3rd-grade reading EOG or alternate assessments and do not meet any of the good cause exemptions outlined by NC Read to Achieve. The school's assessment system is designed to provide a shared understanding of assessment tools and data, enabling informed instructional decisions and ensuring that learner needs are not overlooked or assessed ineffectively.

Portfolios:

Portfolios are collections of student work that demonstrate their learning and growth over time. Students will be required to assemble portfolios of their best work in each subject area throughout the year. Teachers will provide feedback and guidance on the selection of portfolio artifacts and the reflection process.



Learning Showcases:

Learning showcases are presentations or demonstrations of student learning that allow them to share their knowledge and skills with a broader audience. Students will be required to participate in periodic showcases where they present their work to their peers, teachers, and other members of the school community. This will help build presentation skills, communication skills, and confidence.

Applicant Evidence :

 Carolina Achieve Copy of Buil...	 ELA1 Read Critically.pdf	 ELA2.pdf	 ELA3.pdf
Uploaded on 4/28/2023 by Tiffany Alrefae	Uploaded on 4/28/2023 by Tiffany Alrefae	Uploaded on 4/28/2023 by Tiffany Alrefae	Uploaded on 4/28/2023 by Tiffany Alrefae
 ELA7.pdf	 eLA5.pdf	 ELA6.pdf	 ELA4.pdf
Uploaded on 4/28/2023 by Tiffany Alrefae	Uploaded on 4/28/2023 by Tiffany Alrefae	Uploaded on 4/28/2023 by Tiffany Alrefae	Uploaded on 4/28/2023 by Tiffany Alrefae
 Data Wise.jpg			
Uploaded on 4/28/2023 by Tiffany Alrefae			

Q131. 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.

Carolina Achieve will establish and review student promotion requirements annually, which will be communicated to parents. A student support process, overseen by the head of school, will determine promotion or retention based on various factors, including MAP Score growth, PEP goal attainment, staff recommendations, and attendance. In third grade, the school will follow Read to Achieve laws and use portfolio assessments to gather additional data. Exceptions to the grade level placement may occur if a child was previously homeschooled and their lottery-assigned grade level is not appropriate, in which case assessments will be conducted to ensure proper placement.

Students at risk or with disabilities will have individualized goals and plans that must be met to be promoted to the next grade level. Social promotion will not be permitted.

Promotion criteria will be communicated to parents at the beginning of each school year, and any potential retention will be discussed at the spring conference if a student is at risk. Parents will also be notified promptly if a student is not reading at grade level.

Upon graduation from eighth grade, Carolina Achieve expects students to have a comprehensive understanding of all core subjects, as well as the arts and music. Additionally, students will demonstrate a high level of proficiency in the school's Habits of Success and their practical application in daily life.

Q132. 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.



Carolina Achieve will adhere to North Carolina's Standard Course of Study, which includes exit standards for graduating 8th-grade students. These standards include demonstrating proficiency in reading, math, and science through North Carolina End-of-Grade (EOG) tests, meeting or exceeding grade-level expectations for social studies, and developing a digital portfolio that includes evidence of proficiency in key subject areas and the Habits of Success.

Carolina Achieve will have several plans and resources in place to support students at risk of dropping out or not meeting the exit standards. These include early warning systems to identify struggling students, individualized learning plans that set goals and track progress through the Student Success System, regular meetings of the Student Success Coaches, after-school programs, and mentoring programs.

At-risk students will be required to meet the minimum requirements outlined above, and they will have the opportunity to complete alternative assignments for credit recovery as deemed necessary by the head of school and other relevant staff. Carolina Achieve will utilize its Multi-Tiered System of Supports (MTSS) program to intervene for any student who falls behind or is at risk of not meeting graduation requirements. Individualized goals and plans will be developed in conjunction with the Student Success Coach for students who are at-risk or disabled to be promoted to the next grade, and there will be no social promotion.

9.5. School Culture and Discipline

Q133. 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.

Carolina Achieve will be a safe, healthy, and positive academic environment where all students and faculty can thrive academically, socially, emotionally, spiritually, and physically.

Grounded in its Four Roots (strong academic foundation, Habits of Success, well-being, and Home-School partnership), the school's programs, policies, and practices will enable all community members to be seen, heard, reflected, respected, supported, and valued.

The curriculum and programs will be learner-centered and learner-driven with an emphasis on inquiry, wellness, service, and inclusion in order to increase student agency and empowerment.

The school will prepare students for the challenges of the future by developing Habits of Success that encompass mind, character, service, and ethical leadership.

Every student will develop their abilities to think critically and creatively, empathize, and persevere through partnerships with both local and global communities.

Students and faculty will embrace opportunities that extend learning beyond the walls of the classroom in real-world experiences.

Every educator will build trust with students and parents through mutual respect, intentional actions, transparent communication, and clear expectations.

Through the Home-School Partnership, they will intentionally and consistently collaborate with students, parents, guardians, support staff, and community members to review, affirm, and adapt programs to ensure that they fulfill the mission of the school.

Educators will model behavior for their students inside and outside of the classroom by embracing inquiry, failure, change, and growth.

In order for this community to be built, administrators will intentionally make room in the curriculum and school day for students and educators to play, explore, rest, recover, and be creative.

Q134. 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.



Carolina Achieve's plan for creating a safe, healthy, and positive culture is multi-faceted, proactive, and adaptable. The goal is to create systems, policies, procedures, and practices that both reflect the people within the community and hold every person accountable for their participation and actions in creating a place that prioritizes academic and personal growth and achievement. The implementation starts with recruitment and will be ongoing throughout their time at the school. Every person is responsible for living the school's values and will receive support that enables them to focus on and achieve their goals, whether they are academic or personal. All systems, policies, procedures, and practices will be regularly reviewed to ensure that they are aligned with the mission of the school and that they are meeting the needs of everyone in the community. Reviews will be conducted both internally and externally to provide the best possible action steps for growth and inclusion.

Four areas will serve as the initial foundation of school culture. While the initial areas focus on school traditions, recruitment, enrollment, and support, as the school grows and changes, so will the plan to develop a safe, healthy, and positive culture.

School traditions - Year-round

Goal: Provide community members with shared experiences that build community, ignite school spirit, create a sense of belonging, develop a legacy, create structure and continuity, promote growth, and celebrate each other. The school will know the traditions are successful if they become part of the foundation and zeitgeist of the community.

1. House System -

1. Create a sense of belonging

2. Provide support from multiple grade levels

3. Instill school values, culture, and spirit

1. Purpose:

2. After enrollment, each student will be sorted into three houses: Blue, Gold, & Green

3. Each house will have students from K - 8 and teachers

4. House events will be scheduled throughout the year

5. Students will remain in the same house until 8th-grade graduation - siblings will belong to the same house to build a legacy

2. Matriculation

1. Formal documentation of the importance of the home-school partnership

2. Establishes each student's commitment to upholding Carolina Achieve's values and expectations

3. Serves as a reminder for students that they are a member of a larger community and it is their responsibility to respect differences, make a positive impact, and support one another

1. Purpose:

2. New students and families will take part in a ceremony prior to the start of the school year, which includes students and family members signing the matriculation oath

3. Students and families who enter the school throughout the year will have a smaller ceremony based on their start date

3. Convocation

1. Welcome the community back together

2. Reestablish community expectations

3. Set the tone for the school year with a specific theme

4. Opportunity to strengthen the home-school partnership

1. Purpose:

2. A ceremony followed by a gathering of students and families to start the school year

4. School meetings

1. Build school culture and traditions

2. Connect students with the mission of the school

3. Connect students to the greater community

4. Provide an opportunity for students and faculty to share their growth and passions with their peers and colleagues

5. Provide an opportunity to explore a specific topic as a community

1. Purpose:

2. Each week there will be a different variation of school meeting: whole school, grade level, house



Recruitment - Prior to Enrollment

Goal: Carolina Achieve seeks to recruit a school community of students, faculty, administration, and families that is reflective of West Triangle residents, including but not limited to identity, background, thought, and ability. The school will host information sessions, events, and focus groups to ensure that it understands the needs and wants of community members. Recruitment is the responsibility of every member of the community. The school will determine that recruitment is successful by meeting enrollment goals for diversity, having a waitlist of prospective students, and maintaining a collection of resumes for future employment opportunities.

1. Students and their families

1. Houses of worship
2. Community events
3. Arts and sports events
4. Online marketing
5. Library postings
6. Tours - meet and greets

1. Focus areas:

2. Teachers and Administration

1. Local hiring fairs
2. Connection with local colleges
1. UNC
2. Duke
3. NC Central - specifically Marathon Teaching Institute
4. Durham Tech
5. NC State

3. NC Association of Public Charter Schools

4. Center for Racial Equity in Education (CREED)

5. Teach for America (TFA NC)

6. Local civic organizations

1. Focus areas:

Onboarding - After Enrollment

Goal: Every person should feel welcome and supported in their new community. The goal of onboarding at Carolina Achieve will be to ensure that students, faculty and staff, and families understand the culture and expectations as they navigate the first few weeks and months at school. The school will measure the success of the onboarding process through multiple interviews and surveys with new community members. A successful onboarding program yields increased engagement in the school community, a clear sense of goals and the necessary support to help achieve them, and minimal disciplinary incidents. The data will be used to improve the onboarding process moving forward.

1. All community members, regardless of the start date

1. Receive a welcome package from the school
2. Access to a portal about policies, procedures, practices, and people
3. Orientation meetings with key stakeholders and groups
4. Onboarding review - an opportunity to help make onboarding better for future community members

2. Beginning of the school year

1. Family meetings
2. Playdates
3. Matriculation
4. Convocation
5. Orientation
6. Guide - an assigned student, faculty/staff, or family to help ease the transition (offered in year 2)

3. Midyear

1. Family meetings
2. Playdates
3. Matriculation
4. Orientation



5. Guide - an assigned student, faculty/staff, or family to help ease the transition
4. Other times
 1. Matriculation
 2. Orientation
 3. Guide - an assigned student, faculty/staff, or family to help ease the transition

Support

Goal: Carolina Achieve will develop systems and structures to ensure that all community members feel supported. Every person requires different support and needs change over time. Therefore, the systems and structures will be adaptable to provide the best possible assistance as community members work to achieve their academic, personal, and professional goals. Our hope is that every community member feels like they belong in our community. The quality and effectiveness of support will be measured internally and externally. A successful support program will boast high retention and low attrition rates.

1.
 1. All members of the community
 1. Affinity groups - Affinity groups are comprised of a group of people who share a common identity, interest, or experience. Research shows that a sense of belonging is key to students' happiness, academic achievement, success at school and beyond, and engagement in the community. This positive system of support allows community members to share unique experiences that they believe impact their lives. Groups will exist separately for students, faculty and administration, and families. They are optional, age-appropriate, and initiated by interest. The school encourages groups with diverse identities, experiences, and abilities and will oversee all meetings and actions to ensure that every group is upholding the school's mission, vision, and values. The school reserves the right to discontinue any group that et the mission, vision, and values or does not contribute to building a safe, healthy, and positive community for all.

2. Students

1. Student Success System

Carolina Achieve will have an interconnected advisory system that will be the foundation for student success inside and outside of the classroom. All students will be assigned a Success Coach. The Success Coach transforms the role of the homeroom or advisor into something more meaningful. This person will meet with students three times daily and serve as their guide throughout the year. The group of students assigned to one coach will be called the Student Success Team and they have the following goals:

- o Develop relationships
- o Build healthy practices
- o Establish school norms, patterns, and culture
- o Support executive function, reflection practices, and metacognition
- o Matriculation commitment to academic and personal growth and achievement

1. Buddy Program

Younger and older students are paired together for various events and activities throughout the school year. Buddy events and activities help build school culture, provide leadership opportunities, and create an environment where students can learn valuable social and emotional skills from one another. This person differs from the guides mentioned above. Guides are in the same grade and courses, whereas buddies are from different grades.

1. Faculty and Staff

1. Professional learning communities (PLC) - PLCs are opportunities for employees to collaborate on areas of their work and the school that enable them to grow personally or professionally, or help the school improve to better meet its mission.

2. Individual professional learning plans - Each employee will work with their supervisor to develop a learning plan that provides them with the training and support necessary to grow in their current roles and to attain their professional goals.

2. Families

1. Home-School Partnership - This partnership is a core element of the school and our Student Success System. A strong partnership between students, parents, and their teachers enables students to have a solid foundation for academic and personal success. Families will have a direct connection to their child's Success Coach, who will help guide them through their child's learning journey.

2. Home-School Partnership Collaboration Committee - This committee will function as the school's Parent-Teacher Association. This group will help foster communication and collaboration between the parents as a whole and the school. It is a voluntary organization that any parent or guardian can join that will support the academic program, well-being initiatives, and the creation of a safe, healthy, and positive school environment for all, including but not limited to fundraisers, hosting events, partnering on initiatives, and providing volunteers for events. Specific guidelines will be developed with school leadership to ensure that this group is aligned to and supports the



school's mission and vision.

Q135. 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.



Carolina Achieve will be a safe, healthy, and positive academic environment where all students and faculty can thrive academically, socially, emotionally, spiritually, and physically. Therefore, the community and culture will be built on a shared sense of values, clear expectations, and relationships and responsive to all of its members. This will result in engaged community members who have a strong sense of self and purpose and who are supported through both their triumphs and challenges.

An effective disciplinary system does not focus on simply punishing community members for failing to meet community expectations, instead, it provides...

- Clear expectations for culture and behavior
- Guidance that enables community members to reflect when their actions negatively impact themselves and others
- Consequences that align with their actions and are a means to learn from the situation
- Ability to restore and rebuild trust with the other members of the community
- A pathway to making better choices in the future

Carolina Achieve will ensure that the school is a safe, healthy, and positive community for all by:

- Being clear with expectations and agreements
- Reinforcing and championing actions that positively impact the community Maintaining student dignity and respect
- Balancing the needs of community members
- Taking appropriate action to ensure both physical and emotional safety
- Implementing values and guidelines drawn from Responsive Classroom principles and practices in K - 8th grade

While Carolina Achieve will not be a Responsive Classroom school, as the school develops its own ethos and guidelines, it will lean on the Responsive Classroom framework because its mission and vision align with that of the school. Teachers will be trained by local Responsive Classroom experts as a foundation for school expectations and classroom management. As stated on their website, "The Responsive Classroom approach to teaching is comprised of a set of well-designed practices intended to create safe, joyful, and engaging classrooms and school communities. The emphasis is on helping students develop their academic, social, and emotional skills in a learning environment that is developmentally responsive to their strengths and needs."

Response Classroom Guiding Principles:

- Principle 1 - Teaching social and emotional skills is as important as teaching academic content.
- Principle 2 - How we teach is as important as what we teach.
- Principle 3 - Great cognitive growth occurs through social interaction.
- Principle 4 - How we work together as adults to create a safe, joyful, and inclusive school environment is as important as our individual contribution or competence.
- Principle 5 - What we know and believe about our students—individually, culturally, and developmentally—informs our expectations, reactions, and attitudes about those students.
- Principle 6 - Partnering with families—knowing them and valuing their contributions—is as important as knowing the children we teach.

The following is a list and definitions of the offenses which may result in suspension or expulsion from school. The list is not exhaustive, and the school reserves the right to amend its handbook at any time. Students and families will receive the Student and Family Handbook upon enrollment at the school and will sign the matriculation oath agreeing to uphold the Carolina Achieve Community Agreements and Handbook. Community members will be notified of any changes.



- Repeated Misconduct: Repeated misconduct that tends to disrupt an orderly school environment, learning, extracurricular activities, or other related activities.
- Disrespect: Conduct or behavior toward a school employee, student, or adult that lacks regard, civility, politeness, and/or courteous consideration that goes beyond the bounds of acceptable student behavior.
- Fighting: Physical conduct between two or more students which is harmful or disruptive.
- Forgery: The making of a false or misleading written communication to a school staff member with either the intent to deceive the staff member or under circumstances that would reasonably be calculated to deceive the staff member.
- Gambling: An unlawful participation in games (or activities) of chance for money and/or other things of value.
- Insubordination/open defiance: Either verbal or non-verbal refusal to comply with school rules or directions from school staff.
- Intimidation/Threats: The verbal or physical threat to do harm or violence to other students(s) or to the property of another person.
- Stealing: Taking the property of another person or school without permission.
- Bullying: A bullying offense includes systematically and chronically being cruel to other students on or off school property that adversely impacts the educational environment at school for students or staff, including but not limited to in-person and cyberbullying.
- Dangerous/Unsafe Acts: Behaving in such a way that could reasonably cause physical injury to any person or property, with or without intention.
- Battery: Any actual and intentional pushing or striking of another student against the will of the other student.
- Leaving school without permission.
- Vandalism: The willful or malicious destruction, damage, or defacement of school property.
- Lewd, indecent, or offensive behavior: Any behavior offensive to common propriety or decency, including but not limited to, “mooning”, offensive touching, indecent exposure, possession, distribution, or display of obscene “hate” material, possession/display of electronic images or text, or similar behavior.
- Public Display of Affection (PDA): Any contact or suggestive contact that is in poor taste and shows disrespect for others as interpreted by school personnel.
- Academic Dishonesty: Willful or deliberate or unauthorized use of the work of another person for academic purposes, or unauthorized



use of notes or other material in any form of communication in the completion of an academic assignment or test.

- **Harassment:** Any threatening, insulting, dehumanizing gesture, use of data or computer software, or written, verbal, or physical conduct that places a Carolina Achieve student or school employee in reasonable fear of harm to their person or damage to their property has the effect of substantially interfering with a student's educational performance, opportunities, or benefits, and has the effect of substantially disrupting the orderly operation of the school.
- **Trespassing:** The unlawful and willful entry or attempted forcible entry of any school property or the personal property of students and school personnel.
- **Extortion:** The willful or malicious threat of harm, injury, or violence to the person, property, or reputation of another with the intent to obtain money, information, services, items of material worth, or to cause fear.
- **Firecrackers/Fireworks:** Unauthorized possession and/or igniting of fireworks or firecrackers on school property, at a school function, or extracurricular activity.
- **Smoking and Other Use of Tobacco Products:** The possession, use, distribution, or sale of tobacco and smoking products, including vape, on school property, at a school function, or extracurricular activity.
- **Gang-related conduct or behavior:** Any conduct or behavior that promotes gang activity, provokes violence or seriously disrupts the orderly operation of learning, any school activity, or transportation.
- **Sexual Harassment:** Any slur, innuendo, gesture, or other written, verbal, or physical contact reflecting on an individual's gender which has the purpose of creating an intimidating, hostile, or offensive educational environment.
- **Sexual Misconduct:** Any willful and/or deliberate act, behavior, or conduct intended to result in sexual gratification, any unsolicited sexual proposal or offensive touching of another person, or any act of indecent exposure.
- **Tampering with the school safety system or falsely calling 911:** The willful and/or malicious activation of a fire alarm, reporting of a fire, or making a false 911 emergency call from school or personal phones.
- **Drugs and Alcohol (distribution/sale/purchase/use/possession):** The transmission or distribution, buying or selling of any drug or contraband substance, or the selling of transmitting of any substance represented to be of said nature. The possession, use, or being under the influence of alcohol, illegal, or illicit drugs, or any other substance capable of modifying mood or behavior or the possession or use of any substance to be of said nature.
- **Threats to the School:** Any direct or indirect threat that may harm the school or may disrupt the function of the school campus or school-sponsored activity including, but not limited to threats made verbally or nonverbally by an act, through social media, or by text/phone.
- **Firearms and other weapons:** The possession, use, or control of any firearm or weapon (operable or inoperable, loaded or unloaded). State law requires that a student who brings a firearm onto school property be suspended for 365 days which may, in extraordinary



circumstances, be shortened on a case-by-case basis.”

Students will be granted due process rights, including the opportunity for a hearing before the Board, in accordance with the state law for suspensions and expulsions. While it may be necessary for students with disabilities to be suspended or expelled from the school, before those students can be suspended for more than 10 school days in a given school year, a manifestation determination meeting will be held by the IEP team to decide if the student's disability caused the misbehavior. The outcome may impact any further disciplinary action taken related to the student, as to ensure the student will not be denied FAPE per federal law.

9.6. Certify

Q136. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
- No

Q137. Explanation (optional):



10. Governance and Capacity

10.1. School Governing Body

Q138. Organization Street Address (if you have one)

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

Lawrence Road and US 70 Business - Hillsborough, NC

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.

Q139. 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 Nonpr...

Applicant Evidence :


CA Initial Members of the Non...

Uploaded on 4/17/2023 by john
oxaal

Q140. Describe the governance structure of the proposed charter school, including the governing board's functions, primary duties, roles, and responsibilities as it relates to overseeing the charter school. Include how the board will recruit, hire, and supervise the lead administrator.



The Board will have a minimum of 5 members and a maximum of 11 members. The Board will have the following officers: Chairman, Vice-Chairman, Treasurer, Secretary. All others on the board will be Members. The primary purpose of the board will be to monitor the operations and effectiveness of Carolina Achieve. The specific purpose of Carolina Achieve is exclusively to establish and govern charter schools under North Carolina Charter School legislation and to pursue the advancement of education and to engage in any and all lawful activities incidental to the foregoing purposes except as stated in the restrictions of the by-laws Section 4.

Prior to the submission of this application the primary purpose of the board has been to find a premises for the school's initial operation and for its final home within the budget constraints of a charter school. In addition the board has been responsible for reviewing the education plan proposed by the Head of School and to determine whether the school's efforts in that regard are meeting the needs of its target student population. Finally, the initial board has surveyed its skill sets to determine the missing skills necessary to operate a charter school focused on STEAM and Entrepreneurial Skills. Members have been added as these missing skills are identified.

Once the school is established, the board will ensure through appropriate oversight that tight financial controls are in place, that operations such as bussing, food, pre and post school hour activities, EC Student and so forth are running smoothly and finally that the students are meeting our goals for academic performance.

We understand that we, the Board of Directors, do not carry out management responsibilities. Our main responsibilities are (1) to ensure the school's academic program is successful, measured by both internal and external assessments; (2) the school's operational programs are faithful to the terms of its charter, including compliance with statutory and regulatory requirements; and, (3) the school is a viable organization, which includes, among other things, that it is financially solvent and has a competent professional staff.

Primary Duties: Our duties as a board member revolve around three words: care, loyalty and obedience. As stewards of the organization, we must exercise reasonable care when making decisions, understand the finances, participate in its governance, attend all board meetings, committee meetings, participate in decision-making and policy setting, while actively participating in risk assessment and strategic planning.

Our duty of Loyalty means we will never use information obtained as a member for personal gain, and will always act in the best interest of the organization by being aware of our conflict of interest policy; avoiding transactions which may result in personal financial gain.

Finally, our duty of Obedience ensures we will not act in a way that is inconsistent with the central goals of the organization. This means we will ensure the organization complies with all applicable laws and regulations and with its own internal documents and policies.

The DAA Board's Primary Role is to govern the charter school through "effective oversight" of the charter agreement, charter plan and ensure overall organizational health through effective policy making and development of the school leader.

Specifically:

- Establishing and Evaluating Student Outcomes.
- Establishing and monitoring management compliance with policies designed to maximize legal compliance and ethical behavior.
- Approving/terminating third party and employee contracts.
- Evaluating the head of school.
- Oversee and approve the use of operational finances.
- Establish and monitor organization's goals (focused on 10 year renewals).
- Developing the board's capacity to understand governance.

The board has hired Tiffany Alrefae, former Assistant Head of School at Orlando Math and Science to be Head of School (head administrator).

Q141. Describe the size, current and desired composition, powers, and duties of the governing board.



Carolina Achieve's Board founding board consists of 7 members. The board consists of members of the community with a wide range of backgrounds including: Charter School Management, EC Education, Corporate audit committee, the founding, growing and selling of more than 25 High Tech and Life Science Companies, the engineering of complex medical equipment, the running of large university departments, the assessment of the performance of private and governmental programs, the assessment of student performance, founding and running entrepreneurial programs for grade school age children, and community outreach. As we get toward our opening, we will add to the founding board to cover for any weaknesses that we perceive are necessary for the proper fulfillment of the duties of the governing board. Foremost among the additions will be parental representatives.

Tiffany Alrefae who will be Carolina Achieve's Head of School is also assisting in the development of the school. She will remain in this position until Carolina Achieve is granted its charter. At that point, she will become Carolina Achieve's Head of School.

The purpose of the board is not to run the school. Instead its purpose is to closely monitor the performance of the organization in its core mission of educating young children in the Triangle Area. The board will also approve the organization's goals and plans before those plans are undertaken. The board will closely monitor the financial activities of the School and insure that the school does not run a deficit. The board will constantly monitor the performance and abilities of the Head of School and the senior administrators. Finally, the board will direct processes for searches for replacements to retiring directors and the Head of School. The Board will participate in searches for Senior Administrators. The board is world class in a number of skill sets. It is anticipated that the Board will be close advisors on a range of issues confronting the Head of School and the Senior Staff.

Powers: Each board member has one vote. The board chair will vote to make or break a tie. No single board member or committee has more power than another. We will exercise the Board's power by making decisions by vote, and speaking with one voice based on that decision. The board will focus its decision making on the mission, vision, goals, head of school evaluation and supervision, and development of policy. The board will have final vote on the recommendations made by management on budgets, education planning, hiring, and student enrollment growth.

Q142. 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.



As mentioned above, the board has numerous qualifications to oversee the implementation of the school's design. We review these qualifications below:

Dr. Tom Nechyba:

PhD in Economics - University of Rochester

- Founding and Governing Board Member (for 5 years) of Durham Excelsior Academy
- Chairman of the Department of Economics at Duke University
- Specialist in the Economics of Charter Schools
- Parent of Charter School Students
- Has overseen all phases of Charter School leadership, governance, curriculum, instruction, performance management and parent/community engagement.

Mr. John Oxaal

BSE in Biomedical Engineering - Duke University. MBA - University of Chicago

- Founder of 6 Companies and lead investor in over 15 companies.
- General Partner Sevin Rosen Funds - Venture Capital Company
- Member or Chairman of over 10 Nominating and Governance Committees, 10 Audit Committees and 10 Compensation Committees
- Fluent in many technologies such as Digital Signal Processing, Silicon Photonics, Computer System Design, Ultrasound System Design, Telecommunication Systems and Genetics.
- Designed and lead the development of the first practical real-time 3D ultrasound system – now the standard of care for millions of cardiology and OB patients per day.
- This background will enable Mr. Oxaal to oversee school finances, assess school leadership, oversee school governance, get access to the entrepreneurial community, help motivate innovative entrepreneurial courses and activities and assess instruction in Math and Science.

Makayla Booker

Master of Science in Special Education with a Specialization in Behavioral issues from St Joseph's University.

- Special Education teacher
- Behavioral Therapist
- Founder of Wall Street Juniors in both Durham NC and Atlanta Ga. Wall St. Juniors teaches financial literacy to grade school children and fosters their entrepreneurial activity.
- Founding board member of a charter school in Atlanta

Dwyane Campbell

PhD in Education (Program Evaluation) University of Rochester

- Executive Director, Fuse Corps assigned to the City of Durham
- Manage Durham's Community Safety and Wellness Task Force.
- Expert in Open Meeting Laws.
- Emily K Center – Director of Post-Secondary Access. Increased the annual reach from 200 to 2,000 students
- Provided personal and virtual services to schools to remove barriers to college access
- Led all the evaluation efforts including randomized control trials.
- Lead Evaluator for a number of non-profits in the Triangle are including The United Way, Center for Health Promotion and Disease Prevention and Teen Health and Success Partnership.
- Dwayne's skills will be invaluable to help Carolina Achieve interface with minority communities, evaluate the success of Carolina Achieve's educational program, identify steps to improve our offerings, and to evaluate the performance of Carolina Achieve's senior staff. He will also ensure that we comply with general statutes such as Open Meeting Laws.

Jeff Clark



BS in Mechanical Engineering – Duke. MBA Duke Fuqua School

- Serial Entrepreneur and Venture Capitalist in the Triangle Area
- Served on 15 Public and Private Board of Directors many as Audit Committee Chair or Member
- Co-founded Aurora Funds who raised and invested more than \$250M in over 30 companies located in RTP, NC.
- Founded several hugely successful companies including Veritas Collaborative, Metabolon, and Matchwell in the Triangle area.
- Board Member for many local 501(c)(3)'s including Chairmanship of CED (Council for Entrepreneurial Development), Chairmanship of TROSA and Board/Executive Committee Member for Caring House
- Executive Director of Development and Alumni Affairs for Duke Medical Center, Associate Director and Director of External Affairs for the Duke Comprehensive Cancer Center and Assistant Dean and Director of External Affairs for the Pratt School of Engineering at Duke University.
- Jeff's skills as a businessman will enable him to effectively monitor the management of the School's physical and financial operations. His position as a leader in the Durham Business and Non Profit Communities will help Carolina Achieve coordinate with many partners important to its mission. His abilities as a fund raiser, as evidenced by his track record at Duke, will help Carolina Achieve develop a solid fund raising program.

Charles Lopez

MA Liberty University Graduate Program, Strategic Human Resources Cornell University

- Board Member, Board President, and Testing Specialist at SIATech Charter School Miami-Dade Fl.
- Developed curriculum directed towards at-risk students to help them pass ACT College test.
- Instructor, Internship Coordinator Miami Dade College School of Business
- Human Resources Professional for 10 years with a Professional Human Resources Certificate and a Certificate of Emergency Management from the Emergency Management Institute.
- Expertise in most areas of Human Resources including: Recruiting and Onboarding, Change/Transformation oversight, Data/Records management, Safety Management, Performance Management, Benefits and Compensation, Risk Mitigation, Coaching and Mentoring
- Bi Lingual Spanish/English
- Ran for NC State Assembly in District 50 (Orange Co) - narrowly lost.
- Human Resources Management is one of the most important aspects of running a charter school. Since Mr. Lopez both worked in a charter school for 5 years and was the Board President of a Charter School he is in a unique position to help Carolina Achieve manage one of its most important assets, its professional staff. In addition, having run for state office in North Carolina for Orange County, Mr. Lopez is deeply imbedded in the areas Latino community. He is helping Carolina Achieve design programs for outreach to the Latino community such as an after hours financial literacy course for parents and potentially a ESL course for parents so that they may more effectively communicate with Carolina Achieve's staff.

Tiffany Alrefae - Head of School.

BS – Boston University; MS – Pace University; Certificate in School Management Harvard University (11/23)

- Has Taught most subjects in most grades from K-12 over the last two decades.
- Taught in NYC public schools, international schools, US based Prep Schools and high-performance Charter Schools
- Dean of Students at Orlando Math and Science (a STEM magnet school which is the #1 ranked Charter School in Florida and in top 20 nationwide).
- Assistant Head of School
- Ms Alrefae's broad experience and success as a school teacher, Assistant Head of School, parent and Dean has given her the breath to take on the challenge of founding a charter school in NC. She has all the expertise necessary to drive the curriculum development, the course content and the student life at Carolina Achieve.

Q143. 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.**



1. The board has four members who have run, from the start-up phase, small companies and have been on the board of small and large businesses that span a broad range of industries and technologies. These experiences will enable the board to comprehend, evaluate and guide the operational success of the school. Two of the board members have broad experience in assessing student academic performance and organizational effectiveness. Two members have experience in teaching EC students and one has an advanced degree in Special Education. Finally, the board has a member who has run a large academic department at an elite university and two board members who have been board members of charter schools.
2. The board has two board members who are professionals in school and organizational assessment. They will lead the assessment process.

CA's governing board will assess whether the school is working towards its mission statement in the following ways:

1. Regularly reviewing and updating the mission statement: The mission statement needs to remain relevant and aligned with the school's goals and objectives.
2. Conducting regular evaluations: The board will conduct regular internal and external evaluations of the school's performance and progress towards its mission, including regular assessments of student achievement, teacher effectiveness, parent satisfaction and waiting lists. The board will utilize the NC Charter School Performance Framework to conduct internal evaluations and also apply for accreditation with Cognia, an external evaluator of schools, to ensure that the school is meeting both state and national standards.
3. Reviewing data and metrics: The board will regularly review its dashboard for data on student attendance, academic growth and achievement, social and emotional learning, diversity, and safety to gauge the school's effectiveness. When reviewing the data, it is important to not only look at mean and median data but also to do an analysis of the variance.
4. Engaging with stakeholders: The board will actively engage with stakeholders, such as teachers, parents, and students, and the public at large to gather feedback on the school's progress towards its mission through surveys and focus groups. This will help the board understand the strengths and weakness of the school's offerings.
5. Conducting regular self-assessments: The board will conduct regular self-assessments to assess its own effectiveness in supporting the school's mission. This help the board identify areas for improvement and take action to better support the school.
6. The board will evaluate Carolina Achieve's financial results quarterly to ensure that funds are managed appropriately. Part of this evaluation will be private meetings with auditors by the audit committee to determine whether there are any material deviations from standard financial practice and to see whether any fraud is evident.

By regularly evaluating and monitoring the school's progress towards its mission, the governing board can ensure that CA is working effectively towards its goals and providing the best possible education to its students.

Carolina Achieve's Head of school will be evaluated based on the progress towards the organizational goals, management of the school's budget, progress towards a successful charter renewal, and good standing with both the authorizer and community.

3. The founding board has 5 men and 2 women with a 43% minority representation. The governing board will initially have 5 men and 2 women with a 43% minority representation. Once classes have started, the board will strive to add one to two members who are current parents of students at Carolina Achieve. All board members believe that parents are one of the school's most important stakeholders. In addition, there will be a standing parental advisory committee to the board.

Q144. Explain the procedure by which the founding board members have been recruited and selected. If a position is vacant, how and on what timeline will new members be recruited and added to the board?



The first board member was John Oxaal. During the early founding period, Mr. Oxaal along with Tiffany Alrefae spoke with many members of the charter school community. This included Tom Miller of Leaders Building Leaders, many charter school leaders, and Rhonda Dillingham of the NC Charter School Association of Charter Schools. We also attended the National Conference for Charter Schools in Washington DC and the NC Alliance for Charter School's annual meeting. Based upon these many conversations, we developed a matrix of the skill sets necessary to start and run a charter school. We then recruited board members with the skills necessary to fill all of those needs.

The Nominating and Governance Committee shall be responsible for filling vacancies. The Committee will ensure that a succession plan for each board member as well as an updated skills matrix are in place with the goal of replacing the vacated seat with the same skill sets. The N & G committee will endeavor to replace unanticipated vacancies over the course of several months. Vacancies that are anticipated because of the end of a director's term will be filled at the end of the directors term to give the outgoing director time to mentor the new director.

One or two board seats will be recruited as soon as feasible after school starts. Those seats are for parents.

Q145. Describe the group's ties to and/or knowledge of the target community.



John Oxaal came to Durham in 1972 to attend Duke University. He subsequently worked at Duke University Medical Center on the development of the first 2D phased array ultrasound system in the Cardiac Catheterization Lab while living in Durham for 4 years. Although he spent much of the next 10 years in various cities around the country he maintained a residence in Durham. He and his wife Marjorie purchased a farm located in north west Durham Co and north east Orange Co. in 1987. He started Volumetric Medical Imaging in downtown Durham in 1992, which developed the world's first real-time 3D ultrasound system. Today, this is the standard of care for many conditions. In 1999, Mr. Oxaal began work for Sevin Rosen Funds, a multi-billion dollar Venture Capital Firm and invested in over 15 companies including companies in the Triangle Area. In 2015, Mr Oxaal became the Entrepreneur in Residence for the BME Department at Duke University. While in that role, he helped found Element Genomics, a gene editing company. Mr. Oxaal was a long time member of the Board of Visitors for the Pratt School of Engineering at Duke and a member of St. Matthews Episcopal Church in Hillsborough. In these roles John has become deeply imbedded in the Triangle Community in general and in the Triangle entrepreneurial community.

Dwayne Campbell is from Jamaica and moved, first, to Boston for school at Boston College and later to New York get his Ph.D. at The University of Rochester. He came to Durham in 2016 with his wife who is a local Physician. He began work here as an evaluator for the Center for Health Promotion and Disease Prevention in Chapel Hill. From there, he became the Director of Post Secondary Access at the Emily K Center in Durham. His program which provided College Access support to Durham Public School Students increased their annual reach from 157 to 2000 students annually. Since April of 2021, Dwayne has been an Executive Fellow with Fuse Corps assigned to the City of Durham. He manages Durham, NC's Community Safety and Wellness task force. In this position, he works extensively with Durham City Council Members, County Commissioners and Durham Public Safety. He is well connected with the Durham Community.

Jeff Clark came to Durham in 1974 to attend Duke University from Dallas Texas. He has been in Durham ever since. He was married to his wife Charlotte (a professor at Duke) here, raised two children here who went to Duke and worked at Duke for over 13 years. He was the Assistant Dean for External Affairs for Duke School of Engineering, Director of Development and Alumni affairs for the Duke Medical Center and Director of External Affairs for the Duke Cancer Center. After his work at Duke, Jeff embarked on a Venture Capital Career by co-founding Aurora Capital in 1994. Aurora provided early funding for over 30 companies in the Triangle area. Jeff has also been active in the non profit sector. He has been the Chairman of North Carolina's CED, Coalition for Entrepreneurial Development, one of the most successful Entrepreneurial Organizations nation wide. He has also been Chairman of the Board of TROSA on the Board and for 16 years.

Charles Lopez started his career in charter schools in Miami/Dade as an evaluator, board member and finally Board President of a charter school directed towards at risk children. He later modified his career to Human Resources and subsequently moved his family from the Miami area to Mebane in Orange Co in 2018. He has been in Human Resources the whole time he has been here most notably as a fractional Human Resources leader for small local companies. Mr. Lopez ran for the NC House in District 50 narrowly losing to Renee Price thus showing his appeal to the Orange Co. community. He is a great public speaker and has led panels for the North Carolina Charter School Alliance on strategies to attract Hispanic students.

Makayla Booker was born and raised in Durham. After leaving home at 16 years old MaKayla realized that she had far more potential than she had thought and began making lifestyle changes to help accomplish her goals. She Graduated from Georgia State University with a double major in Special Education and Human Learning and Development. Later she received her Master's degree in Science in Applied Behavioral Science. Her Master's thesis was "Welfare to Wealth: Using Behavioral Science to promote sustainable community Development and Decrease the Welfare Dependency Rate, Crime and Violence. In 2018 MaKayla founded very successful "Wall Street Juniors" an organization that serves as a wrap-around approach to community needs ranging from financial literacy, community engagement and youth development. She divides her time between Durham and Atlanta.

Thomas Nechyba, Professor of Economics, moved to Durham in 1999 to be an Associate Professor at Duke University specializing in the economics of education. He has chaired the Department of Economics at Duke. He has won a number of teaching awards and was the founding Director of Duke's Bass Connections Program on Education and Human Development. He has been involved in a number of partnerships with NC schools and communities and served as founding board Chair of DataWorks NC. He and his wife raised their children in Durham and he served as a founding and governing board member and parent at Excelsior Classical Academy, a Durham K-12 charter school launched in 2015.

Before moving to North Carolina in 2019, Anjanette Miller founded an educational advocacy center in Dallas, Texas. Started in 2000, the center worked to bridge higher education access for under-resourced youth through tutoring, counseling, workshops, and parent support programs. With a unique training program, the center built partnerships with local nonprofits, charter schools, and after-school programs to prepare staff tasked with SAT and/or ACT test preparation in an effort to share impactful methods for higher test scores in a more equitable and efficient manner. In Durham, Anjanette was the Executive Director of Audacity Labs, an after-school start-up



incubator for teens. Audacity has partners that include Amazon, Fidelity, Adobe and Durham Public Schools.

Q146. Outline the strategic board calendar detailing how often the board will meet according to the bylaws established.

The board will have a minimum of 8 scheduled regular meetings in compliance with NC State Education Policies per calendar year with the June meeting being the annual meeting. In addition, upon notice, the board may hold special meetings at times that are necessary. These meetings may be called by the Board Chair, the Vice-Chair or by a 2/3 majority of the members following all North Carolina Open Meeting Laws. Standing committees will meet between meetings for a more in depth analysis of the progress being made by the organization.

Q147. 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.



The existing board of Carolina Achieve is a founding board. Starting in the summer of 2023 and extending into the fall of 2023 we will be transitioning to a governing board. We will need to develop teamwork, trust, an operational cadence and a knowledge of each member's abilities. In other words, we are all "new" governing board members that require training even though we all have extensive board experience. The first effort in the furtherance of this goal has been to have regular board meetings. We have been holding these meetings since October of 2022. The second effort will be to engage in specific training exercises.

The Board of Carolina Achieve has already received training from their lawyer, Larry Robbins of Wyrick Robbins, on their duties as board members to the 501(c)(3). They have also had training from Sharpe Patel, LLC regarding the Audit process and procedures. Finally they have already received training from Acadia Northstar on both the services of their outsourced finance operation and on PowerSchool. During the summer of 2023, the founding board will begin transitioning to a governing board. As part of that process the board will get training from the board of West Triangle High School. West Triangle High School has 3 board members from the highly successful charter school, Research Triangle High School. In addition, the Board of Carolina Achieve has already calendared 5 day-long training sessions that will be given by the Office of Charter Schools in Raleigh. Three of these sessions will be in Raleigh in person and two will be on-line.

As we mature, Carolina Achieve will get new and/or replacement board members. The first of these will be parent members.

New board members will be assigned a mentor when they are elected to the board. That mentor will review the resource binder created by the founding board. The binder will include a copy of the charter application, the charter issued by the state, the board's bylaws and policy manual, a copy of the Open Meetings Laws, a copy of all charter and public school laws, the expectations of a board member, and a calendar of scheduled meetings. Most importantly, the outgoing board member will help the new board member understand the history of Carolina Achieve, the big decisions that it has faced, its culture, the details of particular operational areas, the goals of Carolina Achieve and its challenges.

One of the best avenues for recruitment for the Board will be the standing committees. These standing committees, in addition to being strong recruitment tools provide orientation for potential board members. Being on a committee provides the volunteer member an opportunity to better know the school's operations and personnel. In addition, volunteer members will become accustomed to the Board's vision, goals and practices.

Another strategy we will implement to improve our board performance will be the annual meeting. We will host a retreat for board members that will provide key information and training on the roles and responsibilities of a board member. In addition, this is the time that the board will cast vision, set the goals and priorities for the school year. This will enable board members to coalesce around the strategies and challenges for the upcoming year and board members will receive four additional hours of governance training annually.

To have a better understanding of the school's operations and initiatives, at each board meeting, we will ask the head of school to schedule 10-15 minute learning sessions from key members of the staff to educate the board on the pillars of the school's operations (ie. education plans, student discipline practices, hiring procedures, teacher development, food service, bussing, student assessment, exceptional children to name a few).

Additional Training Topics:

Financial

The school must deliver a high quality education within its budget. At each board meeting the budget will be reviewed as an equal partner of the educational assessment. The full budget will be reviewed and the details of a particular operational area will be reviewed at each meeting.

Roles and Responsibilities: This annual training will ensure our members understand that their role is to govern not to run the school. The board will review assessment techniques for various phases of the operations team that are team are meeting the needs of the students, staff and stakeholders.

Legal Compliance: This session will review our organization's most critical documents, federal, statutory and regulatory requirements. One of our founding board members, Dr. Dwayne Campbell is an expert in NC Open Meeting Laws. He is a FUSE Fellow and currently works with the Durham City Council and Durham Co. Board of Commissioners to ensure compliance with Open Meeting requirements.

Board members are expected to attend at least one conference per year directed towards the operation of Charter Schools. The board training and development timetable, topics and participation requirements are outlined as a draft Board Policy,



Carolina Achieve is undertaking one of the most serious and impactful jobs in our students lives. The board cannot be lax in this duty. Instead each member of the board must deliver the full measure of their talent. This talent cannot be accessed without a complete understanding of the full set of issues that we face and that will be reviewed in our training.

Q148. 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's conflict of interest policies are delineated in our By Laws. Section 4 states:

Directors of the Corporation shall exercise good faith in all transactions touching upon their duties to the Corporation and its property. In their dealings with and on behalf of the Corporation, directors are held to a strict rule of honest dealing. In addition to the conflicts of interest provisions hereof, the Company and the Board shall at all times comply with the requirements of Chapter 55A of the General Statutes of the State of North Carolina, as amended from time to time, with respect to conflicts of interest. In addition to the provisions herein related to Conflicts of Interest, the Board shall adopt a code of ethics and whistleblower policy for members of the Board, officers and employees to observe and practice high standards of business and personal ethics in the conduct of their duties and responsibilities.

Each director, before taking his position, shall disclose in writing to the Chair a list of all businesses or other organizations of which he or she is an officer, director, shareholder, member, owner or employee, or for which he acts as an agent and with which the Corporation has or might reasonably in the future enter into a relationship or a transaction in which the director would have conflicting interests.

If any matter should come before the Board or any of its committees in such a way to give rise to a conflict of interest, the affected director shall make known to the Board the potential conflict and shall answer any questions that might be asked of him. The Board shall determine whether or not a conflict exists. If the Board determines that a conflict does exist, the affected director shall be excluded from voting.

The affected director shall be counted in determining the quorum for the meeting except as provided herein. If the material facts of a transaction and the director's interest were disclosed or known to the Board or a committee of the Board and the Board or committee authorized, approved or ratified the transaction, a quorum is present if a majority of the directors who have no direct or indirect interest in the transaction voted to authorize, approve, or ratify the transaction. A majority of votes, whether or not present, that are entitled to be cast in a vote on a transaction where the material facts of the transaction and the director's interest were disclosed or known to the members of the Board entitled to vote constitutes a quorum; the members entitled to vote on such a transaction shall include all directors except (i) those directors with a direct or indirect interest in the transaction and (ii) those directors who have a material financial interest in another entity or are the general partners of another entity which is a party to the transaction. The minutes of the meeting shall reflect the existence of the conflict, the abstention from voting, and the quorum situation.

Any director may raise an issue as to whether another director's circumstances or situation renders his service on the Board in conflict with the best interests of the Corporation. In any such case, the Board shall determine if such a conflict exists, and what action, if any, should be taken.

Before any immediate family member, as defined in Section 115C-12.2 of the General Statutes of the State of North Carolina, as amended from time to time, of any member of the Board or any Company employee with supervisory authority shall be employed or engaged as an employee, independent contractor, or otherwise by the Board or the Company in any capacity, such proposed employment or engagement shall be (i) disclosed to the Board and (ii) approved by the Board in a duly called, open session meeting.

The foregoing section shall not be construed as preventing a director from briefly stating his position to the Board concerning the manner in which he has a possible conflict of interest or from answering pertinent questions of other directors concerning the matter because his knowledge may be of assistance to the Board.

Q149. Explain the decision-making processes the board will use to develop school policies.



All Board Members of Carolina Achieve have served on the Board of Directors of Commercial Enterprises or on significant nonprofits. Therefore, they have experienced a range of decision making styles and board management techniques. For Carolina Achieve, we will work together in a way that yields good decisions as follows:

In developing school policies, first, it is necessary that all board members express their opinions regarding important issues. Without this expression, differences cannot be resolved. In other words, constructive disagreement cannot be harnessed to develop more fully robust policies. In addition, it is impossible for the board to work together as a team if some members are harboring disagreements about important issues. That said, there will be times when not all board members agree on a policy and it will be necessary to implement a policy that is disagreed on. At these times we will use a policy of "disagree but commit". In other words, all directors will help implement the policy even though some disagree. When this happens, it will be necessary to review the policy more frequently to ascertain whether it should be changed.

For this to work, we will try to keep the board on the smaller side (7-9 directors) to give all members the time to speak up in detail. We will also spend time together outside of board meetings in order to develop the mutual trust and respect necessary for give and take. We will also assign an annual policy review to our Governance Committee that will consist of board members, legal counsel and members of the management team.

Secondly, The board will work with key stakeholders (parents, community members, lead administrator) to gain different perspectives with regard to school policies. Additionally, the board will reach out to other successful charter school boards to gain their perspective and wisdom with regards to school policies.

As with all the decisions made by the board, paramount is the fact that these policies support the mission and goals of Carolina Achieve

In developing school policies, initial recommendations will come from committees, the head of school and parents based on whether our policies are meeting our desired lawful purpose.

The process may be as follows:

- A need will be identified (anyone in the organization can begin this process);
- Data will be collected;
- Recommendations will be made ;
- Policy will be drafted;
- Policy will be introduced for stakeholder input;
- Policy will be presented to the board for discussion and later action; and
- Policy is embedded into the school's manual, disseminated, and communicated.

Q150. 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.



The Board may create advisory committees from time to time. The advisory committees shall be appointed by the Chair of the Board and approved by a majority of all directors in office. The advisory committee shall include one (1) or more directors. Advisory committees shall not exercise the authority of the Board and shall serve only in an advisory capacity.

The initial standing committees are: Executive, Audit, Nominating and Governance, Educational Assessment & Student Body Recruitment. Each Board member shall serve on at least on one (1) committee. Membership on the committees is not restricted to Board members except for the Executive Committee and any committee working on personnel issues. Each Committee shall establish a Charter, which must be approved by the Board, by which the committee operates and describes the duties of the committee.

The Audit Committee's duties include: helping the staff prepare an annual budget, meeting with our auditors quarterly to measure plan vs. actuals and to discuss significant accounting issues, meeting alone (i.e., without school administration) with the auditors annually to determine whether there are any significant weaknesses (such as non-segregation of duties) in our financial processes and whether there is any fraud detection, and reviewing major financial risks to the school. Unlike for profit corporations, the Audit Committee at CA will also be in charge of all aspects charitable giving campaigns. The Audit Committee shall have at least one member who is a Parent

The Nominating and Governance Committee will be in charge of determining the skill sets necessary to monitor the school in relation to the Charter, recruiting new board members to replace members who are stepping down, onboarding of new members, reviewing (on an annual basis) all governance documents and employee handbooks, ensuring that school is in compliance with all NC statutes such as NC Open Meeting Laws, insuring that a succession plan is in place for the Head of School and other key administrators, and lead the Board's annual self-evaluation process. The N&G Committee shall have at least one Parent and one CA administrator.

The Educational Assessment committee shall determine whether the school is succeeding in its core mission, which is to provide a top rate education to its students. Standardized tests will be used as will interviews with parents and site visits. Forensic testing will be used to determine the causes of any shortfalls and to help elucidate the most effective remedial actions. At least one Parent will be on the Educational Assessment committee.

The Student Body Recruitment Committee is responsible for nsuring that the school's recruitment efforts are on track both in terms of raw numbers of students and the student demographics. This committee will be especially important in the first years of operation. They will monitor the schools implementation of the weighted lottery, they will help with community outreach programs, they will review the school's digital media presence. The Student Body Recruitment Committee shall have at least one parent and one student on it.

The Executive Committee shall consult with the Head of School from time to time and provide formal feedback on operations. The Executive Committee with review, from time to time the School's strategic direction and make recommendations to the Board of Directors. The Executive Committee shall undertake a formal review of the Head of School on an annual basis. The Executive Committee shall also recommend compensation rates for the School Employees to the Board. The Executive Committee shall be composed of The Chairman, the vice-chairman, and other directors voted on by the board.

Finally, a Parent Teacher Association (PTA) will be established to support teachers and staff in their mission. The PTA will report to the Head of School.

Q151. Discuss the school's grievance process for parents and staff members.



Occasionally, issues may arise among members of the school community. If a parent has a grievance in regard to a teacher or other employee following steps should be taken as needed:

1. Discuss this problem with the teacher immediately.
2. If there is no resolution to the issue, communicate to the head of school.

This may result in an additional meeting with the teacher and Head of School.

3. If there is no resolution to the issue the parent may file a grievance by following the board's policy and grievance process.
4. The board or appointed committee will receive the grievance and determine the next steps.

If an employee has a concern or complaint, then the employee should follow the steps outlined below:

1. Complaints should be taken to the Head of School.
 2. A meeting should be scheduled with the Head of School to discuss the problem, concern, or question.
3. If the matter concerns the Head of School, or if the matter remains unresolved, then the grievance should be brought to the attention of the Chairman of the Board

If anyone in the community has a concern about wrong doing the following procedure for whistleblowers should be followed.

Carolina Achieve, Inc (the "School") is committed to operating practices with the highest possible standards of quality, delivered in an ethical and legal manner. CA's interactions with students, suppliers and others require trust, and all of CA's directors, officers and employees (herein referred to as "personnel") must maintain strict compliance with all applicable laws and regulations and must refrain from fraudulent, wrongful and improper conduct.

Carolina Achieve has adopted an Employee Handbook that establishes specific expectations regarding the behavior of its personnel and is committed to maintaining an effective internal control environment to detect and to prevent or deter improper activities. Effective internal controls can also ensure the accuracy of CA's financial reporting and related disclosures. However, even the best systems of internal controls cannot provide absolute safeguards against irregularities. Intentional and unintentional violations of laws, regulations, policies and procedures may occur, and Carolina Achieve has a responsibility to investigate and address allegations of suspected fraudulent, wrongful or improper activities.

This "Whistleblower Policy" serves to document the procedures CA will employ in addressing reports of suspected fraudulent, wrongful or improper conduct of School personnel, as well as suspected wrongdoing or complaints related to Carolina Achieve's accounting, internal controls, auditing or financial reporting matters. For purposes of this policy, an employee who reports alleged wrongdoing or improper conduct is referred to as a "whistleblower." CA's employees are encouraged to follow the guidelines provided by this policy related to reporting such conduct or complaints.

PROCEDURES

Allegations of Suspected Fraudulent, Wrongful, or Improper Conduct by Carolina Achieve's personnel are to be reported to The Head of School

-OR-

Allegations of Suspected Wrongdoing or Complaints perpetrated by the

President/CEO or relating to Carolina Achieve's accounting, internal controls, auditing or financial reporting matters are to be reported to Carolina Achieve's Audit Committee via mail to Carolina Achieve 20 Rountree Lane Durham, NC 27503, Attn: AUDIT COMMITTEE ONLY.

1. Any employee may report allegations of suspected fraudulent, wrongful or improper conduct, including allegations reported to employees by outside parties.
 1. Reports should be factual rather than speculative, and contain as much specific information as possible, including: name(s), dates, places and events; the employee's perception and why he/she suspects the fraudulent, wrongful or improper conduct, or wrongdoing in accounting, internal controls, auditing or financial reporting matters; and the desired actions the employee recommends.
 2. Any employee who suspects fraudulent, wrongful or improper conduct of School management or other School personnel is expected to immediately report such suspicions or allegations by notifying his/her/their immediate supervisor. If an employee suspects wrongdoing or improper conduct is being perpetrated by, or involves his/her/their immediate supervisor, or any other member of



management, the matter is to be reported to either the Head of School

3. In the event the suspected wrongdoing or improper conduct is being perpetrated by the Head of School, or involves complaints relating to accounting, internal controls, auditing or financial reporting matters, the matter is to be reported to the Chairperson of Carolina Achieves Audit Committee.

-OR-

Reports to the Audit Committee may be sent via a written report to

John Oxaal 20 Rountree Lane Bahama, NC 27503. Correspondence should be marked "Confidential - to be opened by the Carolina Achieve Audit Committee Chairperson Only."

1. Any employee who knowingly reports or makes false allegations of wrongful conduct or improprieties shall be subject to discipline, up to and including termination of employment.

2. Confidentiality of the whistleblower's identity, the nature of the report and the suspected person's identity is to be strictly maintained whenever possible.

ALLEGATIONS OR COMPLAINTS REPORTED TO MANAGEMENT

1. The person receiving the report should assess the allegations to determine whether they pertain to employee related matters, to internal fraud, to the Head of School, or to accounting, internal controls, auditing, or financial reporting matters.

2. Employee related matters are to be forwarded to the Head of School or the Assistant Head of School.

1. Internal fraud allegations are to be forwarded to the Chairperson of Carolina Achieve's Audit Committee for investigation.

2. Allegations pertaining to fraudulent, wrongful or improper conduct involving the Head of School or complaints relating to accounting, internal controls, auditing or financial reporting matters are to be forwarded to the Chairperson of Carolina Achieve's Audit Committee.

1. An investigation will be conducted, respecting the confidentiality of the whistleblower and the suspected party(ies) to the extent possible.

ALLEGATIONS OR COMPLAINTS REPORTED TO THE AUDIT COMMITTEE

1. The Audit Committee Chairman, or his or her designee, is responsible for overseeing the investigation of allegations pertaining to fraudulent, wrongful or improper conduct involving the Head of School, or complaints relating to accounting, internal controls, auditing or financial reporting matters. The Audit Committee has the responsibility to document and investigate all whistleblower allegations reported to the Committee or its Chairperson. Investigators will be designated by the Audit Committee Chairperson and can include the CFO, members of the Audit Committee, the President/CEO or an outside party.

2. Each report is to be investigated and reviewed at the next Audit Committee meeting. Access to files and reports is to be restricted.

3. A risk assessment of the allegation will be made to determine the risk to Carolina Achieve, and the priority/response times will be based on that level of risk.

4. In general, an investigation will only be conducted if the allegations are sufficiently specific and contain adequate corroborating evidence to warrant an investigation. The need for confidentiality of all participants in the investigation must be honored to the extent possible.

5. Investigators must be competent, trained, independent, unbiased, objective and ethical and must observe legal and professional standards.

6. If the identity of the whistleblower is known, to respect the privacy of the suspected party, only a general acknowledgment regarding the receipt of the allegations will be reported to the whistleblower.

INVESTIGATION OF SUSPECTED PARTY(IES)

1. The suspected party(ies) of a whistleblower investigation have the right to consult with a person or persons of their choice. This may involve representation, including legal representation.

2. The suspected party(ies) have a responsibility not to interfere with the investigation. They are not to withhold, tamper or destroy evidence or influence, coach or intimidate witnesses. Unless there are compelling reasons to the contrary, subjects should be given the opportunity to respond to material points of evidence contained in an investigation report.

REPORTING REQUIREMENTS OF A WHISTLEBLOWER INITIATED INVESTIGATION TO THE AUDIT COMMITTEE

1. At the conclusion of a whistleblower investigation, a written report that describes the findings of the investigation, including a summary of the evidence gathered and a conclusion as to whether or not the allegations are substantiated, is to be completed.

2. All whistleblower allegations will be reviewed by the Audit Committee semi-annually, and subsequently by the Board through the Audit Committee's minutes. At a minimum, the report should evidence the allegations received, the ranking of risk/impact on the organization, whether or not the allegations were determined to be substantiated, the turnaround times from reporting to investigating and



investigating to resolution, the allegation reporting avenues used (e.g., e-mail, telephone, etc.), and any outside parties involved.

3. Records of whistleblowing complaints, investigations and reports are to be retained for at least seven years, or longer periods of time as required by the law.

PROGRAM MONITORING

1. The Audit Committee is responsible for monitoring the effectiveness of and compliance with the Whistleblower Policy.
2. This Policy is to be reviewed at least annually by the Audit Committee and changes made as necessary.

NON-RETALIATION

No adverse personnel action will be taken against an employee of Carolina Achieve, nor will retaliation against such person be tolerated, for the disclosure of information the employee made in good faith believing that the complaint involved:

violation of any law, gross mismanagement, abuse of authority, fraudulent or dishonest conduct, breach of internal controls, and/or improper or fraudulent accounting, auditing or financial reporting.

No supervisor, manager or any other employee with authority to make or materially influence significant personnel decisions shall take an adverse personnel action against an employee or otherwise retaliate against an employee for disclosing alleged wrongful conduct or improprieties. Any employee found to have so violated this procedure shall be disciplined, up to and including termination of employment.

Complaints of alleged retaliation are to be directed to the person that the whistleblower complaint was first reported to, the Head of School or the Audit Committee

Q152. Attach as 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 Final.pdf

Uploaded on **4/26/2023** by
Lauren Watters

Q153. Attach as 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 Membe...



Applicant Evidence :


Appendix H_Final.pdf

Uploaded on **4/28/2023** by
Lauren Watters

Q154. Attach Appendix I For Each Board Member

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

PLEASE NOTE: A background check that does not meet the following requirements will be deemed incomplete and could jeopardize the submission status of your application.

- **Background check must include a Social Security Trace (which scans his/her SSN and lists every county/state of residence where that SSN has been used).**
- **Background check must include any additional aliases that have been used by the individual.**
- **Background check must include a completed county level check for any county returned in the Social Security Trace.**
- **Background check must include a completed nationwide check.**

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 50

Resources


Charter School Board Membe...

Applicant Evidence :


Appendix I Final.pdf

Uploaded on **4/26/2023** by
Lauren Watters

Q155. Attach as 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 Comments :

These By-Laws have been approved by the BOD of Carolina Achieve.

Applicant Evidence :


Appendix J Final.pdf

Uploaded on **4/19/2023** by
Lauren Watters

Q156. 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 Comments :

Carolina Achieve, Inc was originally incorporate as Durham Aspire Academy. We have attached those Articles of incorporation. We have also attached the amendment that changes the name to Carolina Achieve, Inc.

Applicant Evidence :


Appendix K Final.pdf

Uploaded on **4/19/2023** by
Lauren Watters

10.3. Staffing Plans, Hiring, and Management

Q157.**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 Template.xlsx

Applicant Evidence :


Staffing Chart Template.xlsx

Uploaded on **4/25/2023** by
Tiffany Alrefae

Q158.**Staffing Plans, Hiring, and Management** Explain the board's strategy for recruiting and retaining high-performing teachers.



The board and Head of School will collaborate to recruit, support, and retain high-performing teachers, with the Head of School being the lead on hiring teachers. Carolina Achieve will follow best practices for the recruitment, support, and retention of high-performing teachers.

Recruitment

- Clear job descriptions
- Thorough and thoughtful selection process: resume, interview with a diverse group of stakeholders, reference check, and teaching demonstration
- Competitive compensation packages and benefits
- Diverse candidate pool
 - Attending and hosting local hiring fairs
 - Online job boards
 - University partnerships
 - Duke
 - Durham Tech
 - North Carolina Central University - specifically Marathon Teaching Institute
 - North Carolina State University
 - University of North Carolina
 - Connecting with NC organizations
 - Ablr
 - Center for Racial Equity in Education
 - LatinexED
 - Teach for America
 - The New Teach Project
 - Internal teaching workshops

Onboarding

- Comprehensive orientation to introduce new faculty to people (students, faculty, staff, and families), culture, policies, practices, procedures, and programs
- Mentor program

Support and Retention

- Professional learning and development opportunities: training, workshops, conferences, etc.
- Mentoring programs for new hires and early career professionals
- Opportunities to join various school committees, professional learning communities, affinity groups, and feedback groups
- Advancement and leadership opportunities
- Timely and effective feedback and evaluations
- Assistant Teachers will serve as a built-in recruiting source for new teachers because they already know the school community, culture, and programs

Q159. 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.



Tiffany Alrefae has been selected as Carolina Achieve's Founding Head of School.

Founding School Experience

As a founding administrator and teacher at four schools, she led and participated in all aspects of opening a new school, including student and faculty recruitment, curriculum development, building school culture, and community outreach. Her work has centered around creating school environments that balance rigorous academics with well-being.

In Jordan, Ms. Alrefae was instrumental in developing a summer enrichment program for middle school students from underserved communities and helped them prepare academically, emotionally, and socially to enter high-performing high schools and colleges. The development of this program led to the creation of a new financial aid system that provided increased equity and access to students from historically and persistently marginalized and excluded communities. Today, these students attend the top universities worldwide, are employees at Fortune 500 companies, and have created their own companies and organizations that are industry leaders.

In New York, Ms. Alrefae structured the high school program to focus on community outreach and connecting students with local businesses, and organizations. She built programs that reimaged the daily schedule and enabled students to spend time in the community. Their work and projects in the community complemented the academic foundation that they were building and enabled them to directly practice the skills that they were learning.

In Virginia, Ms. Alrefae developed a middle school program that increased access to STEM courses and careers for students who were from historically and persistently marginalized and excluded communities. It required creating a rigorous curriculum that was data-driven and provided students with individual learning plans based on their NWEA MAP Growth reports. The school partnered with the National Institute for Health and has increased the number of students from the school who are now majoring in STEM fields and pursuing related careers.

In Doha, Ms. Alrefae transformed teaching and learning to increase teacher autonomy and student engagement. She spearheaded the school's introduction of the Advanced Placement and Pre-Advanced Placement curriculum, as well as the alignment with the elementary programs. Ms. Alrefae led her teachers to extend learning beyond the classroom. This resulted in multiple new programs and workspaces, including a Makers Space, environmental programs and a greenhouse, an aquaponics lab, Green School certification, and a redesign of the daily schedule to incorporate student internships.

Senior Administrator Experience at Established Schools

Ms. Alrefae significantly improved the student academic programs and well-being experience as a senior administrator at a wide range of established schools, from a 200-year-old boarding school to a leading K-12 IB World School to the #1 Charter School in Florida and Top 20 in the US.

In Massachusetts, Ms. Alrefae worked to develop interconnected well-being programs that reimaged the curriculum and associated programs at a 6 - 12 school. She partnered with local university professors to ensure that the new curriculum was both research-based and aligned with best practices. The updated curriculum introduced age-appropriate topics that extended beyond traditional health topics and focused on students developing healthy habits, lifestyles, choices, and relationships. An external team provided feedback that confirmed the changes increased student well-being and the sense that the school was a safe, healthy, and positive environment for all.

In Windermere, Ms. Alrefae led teachers and students to align all academic and well-being programs and initiatives around the school's mission, vision, and values. She created a dashboard that enabled administrators and teachers to proactively monitor the effectiveness of the programs and initiatives against the school's goals. The dashboard helped accelerated the decision-making process and enabled everyone to make more informed decisions that led to an increase in student academic achievement on the SAT, ACT, IB exams, and NWEA MAP Growth tests. Another outcome was to restructure the student report cards to reflect standards and competency-based learning.

In Orlando, Ms. Alrefae spearheaded the school's shift to restorative justice. The shift required training for parents, teachers, and students, people/program/policy/practice/procedure amendments, and a renewed focus on well-being. Through dashboards that Ms. Alrefae created, administrators and teachers were able to effectively address areas of concern and build capacity for the new programs. The school saw a 73% reduction in referrals, detentions, and suspensions, as compared to prior years, specifically for students who identified as Black, Hispanic, two or more races, and with disabilities. On the end-of-year survey, 88% of students said that they felt that the school was a safe, healthy, and positive environment for all, compared to the beginning of the year when it was 64%. 91% of the students also felt that they had at least one adult at school that they could speak with if they were having a problem.



Current Leadership Programs

Ms. Alrefae is currently enrolled in two leadership training programs: Certificate of School Management and Leadership at Harvard School of Education and Harvard Business School, and New Leaders: Envisioning New School Models Fellowship. These two programs are helping her to connect her experience founding schools on four different academic teams, with the necessary operations and financial experience needed to lead a public charter school. Both programs are creating a network of support for Ms. Alrefae. The Harvard certificate is an international program connecting her with teachers around the world and through the New Leaders Fellowship, Ms. Alrefae is working with the Stanford d.school and participating in visits to high-performing schools throughout the US. Her work at schools has included: curriculum alignment, implementation of competency-based education, using Data Wise to drive instruction, building DEI programs, and developing faculty professional learning systems. She has been involved in all aspects of the design, launch, and management of schools.

Comprehensive experience includes:

- 18 years
- K - 12th grade
- US (Florida, New York, Massachusetts, Virginia), Jordan, and Qatar
- School types: charter, for-profit, independent, traditional public
- Subjects taught: English language arts, ethics & philosophy, mathematics, science, social studies
- Founding administrator and faculty member at four schools
- Positions: Assistant Head of School, Upper School Principal (6 -12), Middle School Director (7-8), Acting Elementary School Director (PK3 - 5), Dean of Students, Dean of Operations, Director of Residential Life
- Experienced accreditation team member (NEASC, IB, FCIS, SAIS, Cognia/AdvancED)
- Training and certification: Data Wise, NWEA, Fountas and Pinnell, TCRWP, AP and IB administrator

Q160. 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.

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

Applicant Evidence :


Appendix O Final.pdf

Uploaded on **4/19/2023** by
Lauren Watters

Q161. Provide a description of the relationship that will exist between the charter school employees and the school’s board of directors.

All school employees report to the Head of School and the Head of School reports to the school’s Board of Directors. The Head of School acts as a conduit for information and decisions between the school’s employees and the Board of Directors. A faculty representative will be a non-voting member of the board, who reports on teacher issues, documents board proceedings, and informs school faculty of pertinent information and decisions.

Q162. Outline the board’s procedures for hiring and dismissing school personnel, including conducting criminal background checks.



Hiring Procedure

1. Head of School determines the need for a position with the school leadership team. The Head of School presents the need to the board for approval.
2. Head of School and school admin team advertise the position and collect applicants.
3. Admin team interviews applicants.
4. Acceptable candidates are advanced to an interview with the appropriate faculty department.
5. The admin team meets with the department to decide on the best candidate.
6. When the candidate accepts, the Head of School seeks board approval for the hire.
7. Criminal background check is performed as a part of the incoming HR documentation and the results are stored in the candidate's file.

Dismissal Procedure

1. The Head of School determines the need for the dismissal of an employee and may take short-term action (administrative leave, etc.).
2. The Head of School brings the issue to the board for discussion and approval of any action.

Q163. **Outline the school's proposed salary range and employment benefits for all levels of employment.**

Carolina Achieve will be competitive with local salaries and provide benefits comparable to schools in the Triangle.

Q164. **Provide the procedures for handling employee grievances and/or termination.**



If an employee has a concern or complaint, then the employee should follow the steps outlined below:

1. Complaints should be taken to the Head of School.
2. A meeting should be scheduled with the Head of School to discuss the problem, concern, or question.
3. If the matter concerns the Head of School, or if the matter remains unresolved, then the grievance should be brought to the attention of the Chairman of the Board

If anyone in the community has a concern about wrong doing the following procedure for whistleblowers should be followed.

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Carolina Achieve has adopted an Employee Handbook that establishes specific expectations regarding the behavior of its personnel and is committed to maintaining an effective internal control environment to detect and to prevent or deter improper activities. Effective internal controls can also ensure the accuracy of CA's financial reporting and related disclosures. However, even the best systems of internal controls cannot provide absolute safeguards against irregularities. Intentional and unintentional violations of laws, regulations, policies and procedures may occur, and Carolina Achieve has a responsibility to investigate and address allegations of suspected fraudulent, wrongful or improper activities.

This "Whistleblower Policy" serves to document the procedures CA will employ in addressing reports of suspected fraudulent, wrongful or improper conduct of School personnel, as well as suspected wrongdoing or complaints related to Carolina Achieve's accounting, internal controls, auditing or financial reporting matters. For purposes of this policy, an employee who reports alleged wrongdoing or improper conduct is referred to as a "whistleblower." CA's employees are encouraged to follow the guidelines provided by this policy related to reporting such conduct or complaints.

PROCEDURES

Allegations of Suspected Fraudulent, Wrongful, or Improper Conduct by Carolina Achieve's personnel are to be reported to The Head of School

-OR-

Allegations of Suspected Wrongdoing or Complaints perpetrated by the

President/CEO or relating to Carolina Achieve's accounting, internal controls, auditing or financial reporting matters are to be reported to Carolina Achieve's Audit Committee via mail to Carolina Achieve 20 Rountree Lane Durham, NC 27503, Attn: AUDIT COMMITTEE ONLY.

1. Any employee may report allegations of suspected fraudulent, wrongful or improper conduct, including allegations reported to employees by outside parties.
1. Reports should be factual rather than speculative, and contain as much specific information as possible, including: name(s), dates, places and events; the employee's perception and why he/she suspects the fraudulent, wrongful or improper conduct, or wrongdoing in accounting, internal controls, auditing or financial reporting matters; and the desired actions the employee recommends.
2. Any employee who suspects fraudulent, wrongful or improper conduct of School management or other School personnel is expected to immediately report such suspicions or allegations by notifying his/her/their immediate supervisor. If an employee suspects wrongdoing or improper conduct is being perpetrated by, or involves his/her/their immediate supervisor, or any other member of management, the matter is to be reported to either the Head of School
3. In the event the suspected wrongdoing or improper conduct is being perpetrated by the Head of School, or involves complaints relating to accounting, internal controls, auditing or financial reporting matters, the matter is to be reported to the Chairperson of Carolina Achieves Audit Committee.

-OR-

Reports to the Audit Committee may be sent via a written report to

John Oxaal 20 Rountree Lane Bahama, NC 27503. Correspondence should be marked "Confidential - to be opened by the Carolina Achieve Audit Committee Chairperson Only."



1. Any employee who knowingly reports or makes false allegations of wrongful conduct or improprieties shall be subject to discipline, up to and including termination of employment.
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ALLEGATIONS OR COMPLAINTS REPORTED TO MANAGEMENT

1. The person receiving the report should assess the allegations to determine whether they pertain to employee related matters, to internal fraud, to the Head of School, or to accounting, internal controls, auditing, or financial reporting matters.
 2. Employee related matters are to be forwarded to the Head of School or the Assistant Head of School.
1. Internal fraud allegations are to be forwarded to the Chairperson of Carolina Achieve's Audit Committee for investigation.
 2. Allegations pertaining to fraudulent, wrongful or improper conduct involving the Head of School or complaints relating to accounting, internal controls, auditing or financial reporting matters are to be forwarded to the Chairperson of Carolina Achieve's Audit Committee.
1. An investigation will be conducted, respecting the confidentiality of the whistleblower and the suspected party(ies) to the extent possible.

ALLEGATIONS OR COMPLAINTS REPORTED TO THE AUDIT COMMITTEE

1. The Audit Committee Chairman, or his or her designee, is responsible for overseeing the investigation of allegations pertaining to fraudulent, wrongful or improper conduct involving the Head of School, or complaints relating to accounting, internal controls, auditing or financial reporting matters. The Audit Committee has the responsibility to document and investigate all whistleblower allegations reported to the Committee or its Chairperson. Investigators will be designated by the Audit Committee Chairperson and can include the CFO, members of the Audit Committee, the President/CEO or an outside party.
2. Each report is to be investigated and reviewed at the next Audit Committee meeting. Access to files and reports is to be restricted.
3. A risk assessment of the allegation will be made to determine the risk to Carolina Achieve, and the priority/response times will be based on that level of risk.
4. In general, an investigation will only be conducted if the allegations are sufficiently specific and contain adequate corroborating evidence to warrant an investigation. The need for confidentiality of all participants in the investigation must be honored to the extent possible.
5. Investigators must be competent, trained, independent, unbiased, objective and ethical and must observe legal and professional standards.
6. If the identity of the whistleblower is known, to respect the privacy of the suspected party, only a general acknowledgment regarding the receipt of the allegations will be reported to the whistleblower.

INVESTIGATION OF SUSPECTED PARTY(IES)

1. The suspected party(ies) of a whistleblower investigation have the right to consult with a person or persons of their choice. This may involve representation, including legal representation.
2. The suspected party(ies) have a responsibility not to interfere with the investigation. They are not to withhold, tamper or destroy evidence or influence, coach or intimidate witnesses. Unless there are compelling reasons to the contrary, subjects should be given the opportunity to respond to material points of evidence contained in an investigation report.

REPORTING REQUIREMENTS OF A WHISTLEBLOWER INITIATED INVESTIGATION TO THE AUDIT COMMITTEE

1. At the conclusion of a whistleblower investigation, a written report that describes the findings of the investigation, including a summary of the evidence gathered and a conclusion as to whether or not the allegations are substantiated, is to be completed.
2. All whistleblower allegations will be reviewed by the Audit Committee semi-annually, and subsequently by the Board through the Audit Committee's minutes. At a minimum, the report should evidence the allegations received, the ranking of risk/impact on the organization, whether or not the allegations were determined to be substantiated, the turnaround times from reporting to investigating and investigating to resolution, the allegation reporting avenues used (e.g., e-mail, telephone, etc.), and any outside parties involved.
3. Records of whistleblowing complaints, investigations and reports are to be retained for at least seven years, or longer periods of time as required by the law.

PROGRAM MONITORING

1. The Audit Committee is responsible for monitoring the effectiveness of and compliance with the Whistleblower Policy.
2. This Policy is to be reviewed at least annually by the Audit Committee and changes made as necessary.

NON-RETALIATION



No adverse personnel action will be taken against an employee of Carolina Achieve, nor will retaliation against such person be tolerated, for the disclosure of information the employee made in good faith believing that the complaint involved:

violation of any law, gross mismanagement, abuse of authority, fraudulent or dishonest conduct, breach of internal controls, and/or improper or fraudulent accounting, auditing or financial reporting.

No supervisor, manager or any other employee with authority to make or materially influence significant personnel decisions shall take an adverse personnel action against an employee or otherwise retaliate against an employee for disclosing alleged wrongful conduct or improprieties. Any employee found to have so violated this procedure shall be disciplined, up to and including termination of employment.

Complaints of alleged retaliation are to be directed to the person that the whistleblower complaint was first reported to, the Head of School or the Audit Committee

Q165. Identify any positions that will have dual responsibilities and the funding source for each position.

Carolina Achieve will have a distributed leadership model where different people may take on leadership roles and dual responsibilities based on school needs and personal interest and experience. The ability to provide faculty and staff with these stipended opportunities will help increase retention and teacher morale.

Q166. 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.

Carolina Achieve will hire certified Special Education teachers. The target is for each teacher to have a caseload of approximately 20 students.

Prior to the school reaching full enrollment, core teachers will be used for English Language support, but as enrollment reaches full capacity, a full-time literacy/English Language specialist will be hired.

Personalized learning through Carolina Achieve's Student Success System and Power Hour supports differentiation for all students, including Academically Gifted students. Therefore, classroom teachers will be able to support gifted students at all times.

Q167. 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).



Head of School

- Master's degree in School Administration & Supervision or Education Leadership, or a Doctoral degree in an educational field, preferred, but not required
- Possess either a current Principal certification/license from the NC Department of Public Instruction or extensive related experience in similar roles at independent schools
- 3 years of experience as a school administrator
- Relevant teaching experience
- Effective communication and leadership skills

Duties:

- Overseeing the school's curriculum and educational program
- Maintaining a safe and secure learning environment
- Managing the day-to-day operations of the school
- Monitoring the school's finances
- Providing strategic planning to ensure advancement toward the school's mission
- Attend school events
- Any additional duties, as needed

Assistant Head of School

- Master's degree in School Administration, Curriculum and Instruction, or another field of education, preferred, but not required
- Relevant school leadership experience preferred, but not required
- Relevant teaching experience
- Effective communication and leadership skills

Duties:

- Supporting the Head of School in executing their duties
- Overseeing the academic programs
- Overseeing the faculty: guidance and evaluations
- Guiding school culture and student life
- Attend school events
- Any additional duties, as needed

Director of Operations

- Bachelor's degree from a four-year institution, preferred but not required
- Relevant experience in a similar position or in school operations, preferred but not required

Duties:

- Support the Head of School in executing their duties
- Overseeing school operations: finance, facilities, grounds, school resources, and other non-academic programs
- Overseeing operations staff
- Attend school events
- Any additional duties, as needed

Core Teachers

- Bachelor's degree from a four-year institution
- NCDPI certification in their content area and grade level is preferred, but not required or be working towards certification
- Prior teaching experience is preferred, but not required

Duties:

- Creating a positive learning environment for students
- Executing lesson plans that are consistent with the school's mission and aligned with the NC Standard Course of Study
- Participating in all professional development activities
- Evaluating student performance equitably
- Fulfilling the role of Student Success Coach, including but not limited to student advising and communicating effectively with all



stakeholders including parents, students, and administration

- Attend school events
- Any additional duties, as needed

Special/Elective Teachers

- Bachelor's degree from a four-year institution in their area of expertise
- NCDPI certification in their elective area, relevant experience, or working toward certification
- Prior teaching experience is preferred, but not required

Duties:

- Creating a positive learning environment for students
- Executing lesson plans that are consistent with the school's mission and aligned with the NC Standard Course of Study
- Participating in all professional development activities
- Evaluating student performance equitably
- Fulfilling the role of Student Success Coach, including but not limited to student advising and communicating effectively with all stakeholders including parents, students, and administration
- Attend school events
- Any additional duties, as needed

Exceptional Children (Special Education) Teachers

- Bachelor's degree from a four-year institution
- NCDPI certification in Special Education, **required**
- Prior teaching experience or in a similar role is preferred, but not required

Duties:

- Creating a positive learning environment for students
- Executing lesson plans that are consistent with the school's mission, aligned with the NC Standard Course of Study, and aligned to the student's Individualized Education Program (IEP)
- Participating in all professional development activities
- Evaluating student performance equitably
- Communicating effectively with all stakeholders including parents, students, and administration, ensuring that students with IEPs receive their services, ensuring that the school is in compliance with all federal and state regulations regarding students with disabilities, and providing support for Regular Education teachers in the classroom where appropriate.
- Fulfilling the role of Student Success Coach, including but not limited to student advising and communicating effectively with all stakeholders including parents, students, and administration
- Attend school events
- Any additional duties, as needed

Assistant Teacher

- Associates degree, required, Bachelor's degree, preferred
- Teaching or experience working with elementary students, preferred
- Proficient in the school-related software and online program and platforms

Duties:

- Support teachers in their duties
- Fulfilling the role of Student Success Coach, including but not limited to student advising and communicating effectively with all stakeholders including parents, students, and administration
- Attend school events
- Any additional duties, as needed

Exceptional Children Assistant Teacher

- Associates degree, required, Bachelor's degree, preferred
- Teaching or experience working with elementary students, preferred



- Proficient in the school-related software and online program and platforms

Duties:

- Support teachers in their duties
- Fulfilling the role of Student Success Coach, including but not limited to student advising and communicating effectively with all stakeholders including parents, students, and administration
- Attend school events
- Any additional duties, as needed

School Counselor

- Master's degree in counselor education from a four-year institution
- NCDPI certification is preferred, but not required
- Experience as school counselor or with students, preferred

Duties:

- Performing both proactive and responsive counseling services, including referrals for assistance
- Consulting and collaborating with parents, teachers, administration, and community agencies
- Attend school events
- Any additional duties, as needed

Operations Support Staff

- High School diploma or extensive relevant experience, required
- Organizational skills conducive to managing the front office
- Proficient in the school-related software and online program and platforms
- Customer service experience or similar, preferred

Duties:

- Main office manager
- Liaison between different stakeholders, including but not limited to students, faculty, staff, parents, visitors, and vendors
- Work with perform clerical tasks as deemed necessary by the school administration
- Attend school events
- Any additional duties, as needed

Tutor

- High School diploma or extensive relevant experience, required
- Teaching or experience working with elementary students, preferred
- Proficient in school-related software and online program and platforms

Duties:

- Provide target student support, as determined by school leaders
- Fulfilling the role of Student Success Coach, including but not limited to student advising and communicating effectively with all stakeholders including parents, students, and administration
- Attend school events
- Any additional duties, as needed

Substitute

- High School diploma or extensive relevant experience, required
- Teaching or experience working with elementary students, preferred
- Proficient in school-related software and online program and platforms

Duties:

- Provide coverage and duties, as assigned

10.4. Staff Evaluations and Professional Development



Q168. Identify the positions responsible for maintaining teacher license requirements and professional development.

The Head of School will be responsible for maintaining teacher license requirements and professional development until the Assistant Head of School starts in SY 2026 - 2027. At that time the Assistant Head of School will be responsible for those duties. The teachers will be required to maintain their licenses and professional development records.

Q169. 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.



The North Carolina Professional Teacher Standards will be used to evaluate teachers, with formal observations conducted using the North Carolina Educator Effectiveness system (NCEES) by school administration. At the start of the school year, teachers will rate their own performance using the rubric provided by the NC State Board of Education, and use this self-assessment to create a Professional Development plan (PDP) for personal growth. Teachers will participate in one of three observation cycles annually, Abbreviated, Comprehensive, or Standard, based on their experience level and certification status, with post-conferences held after each observation to identify strengths and areas for improvement.

Abbreviated:

- Teachers **NOT** in their renewal year
- More than 3 years of experience
- 2 formal observations
- Assessed based on 2 out of 5 NC Professional Teacher Standards

Standard:

- Teachers **CURRENTLY** in their renewal year
- More than 3 years of experience
- 3 formal observations
- Assessed based on all 5 NC Professional Teacher Standards

Comprehensive:

- Teachers with their initial license
- 0 - 3 years of experience
- 4 formal observations (3 administrators and 1 colleague)
- Assessed based on all 5 NC Professional Teacher Standards

Pre-conference will take place prior to formal observations. Teachers will have the opportunity to give the administrator a preview of the lesson and discuss what is going to be the administrator's focus of the observation.

Post-conferences will take place after all formal observations. Teachers and administrators will work together to identify strengths and areas of opportunity.

School leaders will meet with every teacher at the end of each school year to reflect on the year. They will discuss the teacher's overall evaluation, progress towards their PDP goals, any summer opportunities, and plan for the following year.

Additionally, teachers will have opportunities throughout the year to provide school administrators with feedback regarding areas including, but not limited to the evaluation process, school culture, and programs.

As the school progress, it will begin to incorporate more components of Leverage Leadership, Teach Like a Champion, and Building 21's competencies (see attached).

Beginning Teacher Mentor Program

Carolina Achieve will provide a comprehensive Beginning Teacher-Mentor program to support novice teachers.

Program features:

- Matched with mentor teacher(s), who will provide coaching, classroom observations, and training (mentors are veteran teachers who have received training and coaching)
 - Weekly meetings to discuss school policies, classroom management, effective instruction, and best practices
- Specific on-boarding program
- Monthly meetings as a cohort



- Observe best practices in other classrooms

All teachers, including beginning teachers, will engage in professional learning each week, where they will collaborate and receive mentorship from colleagues in their grade level or subject area. This model aims to give novice teachers the confidence and competence they need for effective teaching practices and higher retention rates among beginning teachers.

Applicant Evidence :


Carolina Achieve Copy of Buil...


Carolina Achieve Copy of Buil...

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Tiffany Alrefae

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Tiffany Alrefae

Q170. 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.

Professional development at Carolina Achieve supports the school's four roots: strong academic foundation, Habits of Success, well-being, and Home-School partnership. In order for it to be effective it must be on-going, collaborative, purposed, and connected to the school's education plan. Below are the core elements:

1. Strong academic foundation - developing rigorous units of study around competency-based education and opportunities for differentiation, understanding and implementation of Harvard's Data Wise School Improvement Process protocols, and identifying and addressing challenges and gaps in literacy and mathematics
2. Habits of Success - on-going learning to ensure that the Habits of Success are understood and embedded throughout the entire school program, certain sessions will be led by Uncharted Learning
3. Well-being - understanding and implementing the CASEL framework (A framework that creates a foundation for applying evidence-based social and emotional learning strategies to your community) across the education program
4. Home-School Partnership - Understanding and development of the Student Success System, building effective and transparent relationships with between the school, students, and families, how to provide effective feedback by developing language around student reflection and growth

There will also be opportunities for individualized professional growth with topics that are of interest or of need to teachers

Each of these elements supports the license renewal topic areas required for certified teachers in NC. Weekly professional development sessions, put together by school leadership and teacher leaders, will rotate through these elements. The instruction will be provided both internally and externally, as needed. There will be opportunities for teachers who are experts in a given area to lead the sessions. Sessions will be structured to meet the needs of the teachers. They will vary in size from whole-group to independent and type (whole school, grade-level, vertical) based on the goal of the session and each teacher's individual professional learning plan. The Head of School and later on the Assistant Head of School will keep track of professional learning and CEUs for teacher evaluation and certification.

Q171. 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.



Carolina Achieve will have an extended on-boarding program and process for the first cohort of teachers to build school culture and expectations, as well as ensure that teachers have an opportunity to immerse themselves in the four roots of the school: a strong academic foundation, Habits of Success, well-being, and the home-school partnership. This process will commence as soon as a teacher signs their contract. The extended onboarding process for the first cohort not only allows teachers to gain confidence in the school's program, policies, practices, and procedures, but it also allows them to be a part of creating these aspects of the school. Doing this will help to create a greater sense of teacher buy-in and ownership.

Prior to the first teacher workday:

- Read school foundational texts:
 - Evolving Education: A Switch to a Learner-Centered Paradigm by Katie Martin
 - The New Classroom Instruction that Works by Bryan Goodwin and Kristen Rouleau
 - Culturize: Every Student, Every Day Whatever it Takes by Jimmy Casas
 - Deeper Competency-Based Learning: Making Equitable, Student-Centered Sustainable Shifts by Karin Hess, Rose Colby, and Daniel Joseph
- Complete required training (as needed basis)
 - Google certification
 - Data Wise course completion
 - Other health and teaching requirements as requested by the school

Teacher workdays prior to the first day of school (10 days):

Strong Academic Foundation -

- Multiple session discussion and planning how to create a learner-centered and competency-based school. These sessions will be led by the Head of School, teacher leaders, and other experts. The school leadership and teachers will use the foundational texts, as well as other resources for the start of the conversation. Teachers will also set up their classrooms to align with best practices in these areas.
- Multiple sessions unpacking the curriculum to ensure the curriculum, instruction, and assessments are aligned, specifically focusing on literacy across the curriculum, the science of reading, differentiated instruction, and identifying and supporting students with both learning gaps and the need for learning leaps. These sessions will be led by the Head of School, teacher leaders, and other experts.
- Multiple sessions unpacking Data Wise to empower teachers to use data to identify their problem of practice and shift instruction to best meet the needs of their students. These sessions will be led by the Head of School, teacher leaders, and other experts.

Habits of Success -

- Multiple sessions with Uncharted Learning staff for the Entrepreneurship Across the Curriculum workshops. During these sessions, teachers will learn how to integrate entrepreneurial skills, mindsets, and behaviors throughout their units and lessons.

Well-being -

- Multiple sessions with local experts in CASEL framework and Responsive Classroom to introduce teachers to the CASEL framework and conduct workshops on best practices for morning meetings, classroom culture and management, inclusion and belonging, and social-emotional learning.
- Multiple sessions developing and understanding the Student Success System and the role of the Success Coach. These sessions will be led by the Head of School, teacher leaders, and other experts.

Home-School Partnership -

- Multiple sessions with teachers, students, and parents to collaborate on building the home-school partnership. These sessions will allow stakeholders an opportunity to design the program and create the foundation for an effective relationship that will positively



impact student learning and personal development. These sessions will be led by the Head of School.

Q172. 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.

The school will have 29 professional development days throughout the school year.

Prior to the first day of school - 10 days

After Q1 in October - 4 days

Additional days in November - 2 days

After Q2 in December - 5 days

After Winter break - 1 day

Additional day in Feb - 1 day

After Q3 in March - 2 days

After the last day of school - 3 days

Teachers will also have scheduled planning time with their colleagues throughout the week and one afternoon a week where the entire faculty and staff meet up after school. The school has budgeted for a number of assistant teachers, as well as a tutor and substitute teacher, to provide additional support for the teachers and students. These individuals can provide coverage so that teachers are able to visit each other's classes and attend meetings on an as-needed basis.

Teachers will be required to complete some training prior to their first day of work, on an as-needed basis, as outlined in their employment contract. This training may include but is not limited to technology certification, academic program certification, and first aid training.

The 10 days prior to the start of school serve as an opportunity for teachers to participate in the onboarding process; culture building; development and training for curriculum, policies, practices, and program; preparation for the year; and student orientation.

After each quarter, faculty will have the opportunity to reflect and collaborate with their colleagues. During this time, teachers will be able to update Student Success Individual learning pathways, regroup students, prepare for the next units of study, and complete training. This time is critical because it allows teachers to be responsive to student needs and development, which enables them to provide effective instruction and differentiation for every student.

In January, after Winter Break and before the start of Q3, all students and teachers will participate in an intersession. This break from normal classes provides teachers and students with multiple opportunities for enrichment and reinforcement in preparation for the second half of the school year. Teachers will utilize part of the December planning days to prepare for the intersession period.

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.

Q173. 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)).



All of Carolina Achieve's inclusive and non-discriminatory marketing plans and strategies will center around communicating the school's unique mission to help all students achieve their scholastic, personal, and professional goals through its four roots: a strong academic foundation, Habits of Success, well-being, and home-school partnership. The marketing language will be inviting and informative, highlighting the breadth of resources available to expand access to all students through the implementation of busing and the free and reduced lunch program.

Based on the feasibility study and educational needs in the area, marketing will focus on attracting a diverse school community from people primarily residing in Orange and Durham Counties but know that students from other counties will also be interested in applying for the lottery. The school hopes to attract a diverse population that mirrors the combined demographics of Orange, Durham, and the surrounding counties, including but not limited to, identity, background, thought, ability, and neurodiversity.

The school is working with Media Integrations and community partners to ensure that marketing and recruitment reflect the racial/ethnic and demographic composition of the Orange and Durham counties. This plan includes, but is not limited to:

Digital Presence - provide relevant information and target families with school-aged children

- Website - accessible in multiple languages
- Social media platforms - ability to like and share content
- Online surveys - available in English and Spanish
- Mailing list - receive information and events

Network Connections

- Personal networks of the Board of Directors and school leadership
 - Word of mouth campaign
 - Distribute marketing materials
 - Host recruitment events and information sessions

Grassroots Marketing and Community Events

- Informational tables at local community gathering places and events
- Connecting with businesses, organizations, and people at workshops, conferences, and meetings

Print Material - community areas and organizations, including preschools and childcare centers

- Signage
- Brochures and flyers to distribute throughout the community

Media

- Advertising in the local newspapers and print media
- Participate in information spotlights on local podcasts and news channels

Carolina Achieve will follow all admissions requirements as outlined in G.S. 115C-218.45, with specific attention to G.S.115C-218.45(e):



Except as otherwise provided by law or the mission of the school as set out in the charter, the school shall not limit admission to students on the basis of intellectual ability, measures of achievement or aptitude, athletic ability, or disability. A charter school shall not limit admission to students on the basis of race, creed, national origin, religion, or ancestry. A charter school whose mission is single-sex education may limit admission on the basis of sex. Within one year after the charter school begins operation, the charter school shall make efforts for the population of the school to reasonably reflect the racial and ethnic composition of the general population residing within the local school administrative unit in which the school is located or the racial and ethnic composition of the special population that the school seeks to serve residing within the local school administrative unit in which the school is located. The school shall be subject to any court-ordered desegregation plan in effect for the local school administrative unit.

Q174. Describe how parents and other members of the community will be informed about the school.



Carolina Achieve has taken the necessary steps to begin to inform parents and other members of the community about the school, including hiring Media Integrations. Media Integrations is a Raleigh, North Carolina-based branding and marketing strategies firm. They highlight the unique aspects of each client by devising and implementing comprehensive messaging that gets the right information in front of the right prospects, using the most effective marketing methods in each unique circumstance. To date, they have helped Carolina Achieve create its logo, website, newsletter, and initial community outreach opportunities. As we move forward, Media Integrations will work closely with Carolina Achieve to develop a specific strategic plan and timeline for recruiting students, families, and employees, and initiating community outreach with synergistic partners such as government officials, business owners/operators, entrepreneurs, and area organizations with a focus on youth and families.

Parents and other members of the community will be informed about the school in a variety of ways, including, but not limited to:

- Informational meetings (in-person and virtual)
- Website (accessible in multiple languages)
- Social media campaigns (Facebook, Instagram, LinkedIn, and Twitter)
- Direct marketing and advertising campaigns
- Individual conversations
- Informational booths at local events
- Open houses (when the school facility is completed)
- Carolina Achieve Supporter events (homes, businesses, etc)
- Engagement and presentations involving youth-oriented organizations such as Boys & Girls Clubs, Head Start programs, youth sports leagues, Parks & Recreation departments, before/after programs, preschools, and childcare centers
- Places of Worship
- Business/community service organization presentations (Chambers of Commerce, business networking groups, virtual office/co-working facilities, Rotary, Kiwanis, and Lions Club)

In the summer of 2023, Carolina Achieve will begin a campaign to recruit students and teachers, utilizing the methods detailed above. This campaign will be supported by the recruitment efforts of West Triangle High School, the other school that will be located on the same property.

During this timeframe, Carolina Achieve will also initiate an “entrepreneurial outreach” campaign, by familiarizing themselves with business leaders throughout their service area. They will begin an intentional process of introducing their school, as well as their entrepreneurial focus and the emphasis on the Habits of Success concept. In this process, they will begin to develop relationships with the area’s largest employers of all types, as well as local businesses that are independently owned & operated, and the organizations that support business growth in Orange and Durham Counties, such as community colleges, economic development offices, chambers of commerce and downtown business associations.

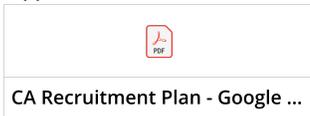
By implementing this innovative step, Carolina Achieve will accomplish two significant objectives. First, will be an increase in general awareness, affinity, and enthusiasm for their school and its overriding concept. Second, will be developing a database of local business owners and operators who will ultimately have a presence at the school and will participate in helping the students see the Habits of Success in real-life settings.

Q175. 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.

See attachment



Applicant Evidence :



Uploaded on **4/27/2023** by
Tiffany Alrefae

Q176. 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.

Carolina Achieve believes that the target population for the school are families that want to ensure that their children attend an inclusive school that develops a strong academic foundation, builds entrepreneurial skills, mindsets, and behaviors, prioritizes well-being, and establishes an effective partnership between the home and school. The school will be in a diverse area between Orange and Durham counties, where the students from the following groups are not being adequately served in traditional public schools based on the most recent and historical NC state assessments. These groups include, but are not limited to students from low-income families, academically low-achieving students, students with disabilities, English language learners, and other students at-risk of academic failure. Many of these students also qualify for free and reduced lunch, therefore the school's participation in the weighted lottery, as well as providing busing should help attract these students and their families.

The school leadership, board, advocates, and marketing team plans to spend the next fifteen months marketing the school and gathering support and potential families for enrollment throughout neighborhoods, community centers, and houses of worship in Orange and Durham counties to ensure that we meet our enrollment goal and weighted lottery target. These places and communities include, but are not limited to, Heritage Apartments, Gateway Village Apartments, Cadence at Cates Creek, Crescent Magnolia, Eno Haven Apartments, Durham Housing Authority sites, Orange County Community Center, Chapel Hill Community Center, and Durham Communities Centers.

The school is working to partner with local organizations, such as El Centro Hispano, Wall Street Juniors, Bull City Alphas, and others to ensure that students from all backgrounds, identities, thoughts, and abilities know about the school and the enrollment and lottery process. The website is already accessible in multiple languages and the application, as well as other print material, will be available in English and Spanish.

Q177. What established community organizations would you target for marketing and recruitment?



- Places of worship
- Hillsborough Community Center
- Chapel Hill Community Center
- Local libraries: Chapel Hill, Durham, Hillsborough
- Orange County Sportsplex
- Wall Street Juniors
- Echo NC
- El Centro Hispano
- Boys and Girls Club Durham and Orange Counties
- YMCA
- Orange County 4H
- Poof
- Bull City Alphas
- Thomas Mentor Leadership Academy
- Local preschools and daycare centers (including Head Start)
- Affordable housing locations
- Kidzu Museum
- Museum of Life and Science
- Local sports clubs, including but not limited to Triangle United, Rainbow Soccer, NCFC, and Soccer.com
- Local parent resource guides

10.6. Parent and Community Involvement

Q178. Describe how you will communicate with and engage parents and community members from the time that the school is approved through opening.



Carolina Achieve is using Transcend's Model of Community Engagement (see attachment) to proactive connect and communicate with parents and community members. This model helps schools engage with stakeholders in four important ways: informing, consulting, collaborating, and involving.

Inform

Carolina Achieve wants to provide and engage parents and community members through clear, transparent, and effective communication methods, including direct (newsletters and parent portal) and indirect (social media and town fliers). Parents and community members who are interested in the school can sign-up to be on our mailing list. The mailing list members will receive newsletters, as well as other pertinent and timely information about the school. There will also be an opportunity for parents and other community members to sign-up for text alerts. Information will be distributed in English and Spanish. Parents will have access to a Parent Portal once their child has enrolled in the school. The portal will provide targeted and timely information that parents who are new to the school will need to know.

Consult

Over the last eighteen months, members of Carolina Achieve's board and the founding head of school have conducted focus groups and interviews with various community members to understand student, community, and family needs (See Appendix A). The information gained from these in-person and virtual sessions and through the multi-lingual surveys has helped the founders make valuable decisions, such as busing, lunch programs, and academic focuses.

Collaborate

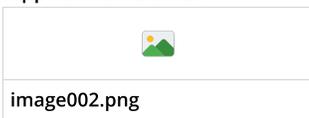
The school is working with a number of local and national advisors to ensure that the programs, practices, policies, procedures, and people are aligned with the mission and vision of the school. Currently, these advisors are acting as a design team to help launch the school. When the school opens the school will continue to evaluate its advisors and partnerships and the role that they play in ensuring that every student is prepared to achieve their scholastic, personal, and professional goals.

Involve

Carolina Achieve knows that it must be responsive to the needs of all of the stakeholders. The school will look for opportunities to continue to involve them and include their ideas as the school grows. Viable ideas will be vetted to determine whether or not they align with the mission and vision. If they align, then the next steps will be put into action.

When the school opens, Carolina Achieve will continue to use all four ways of engagement to connect with stakeholders.

Applicant Evidence :



Uploaded on **4/25/2023** by
Tiffany Alrefae

Q179. 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.



Carolina Achieve knows that parent and caregiver engagement in the life of their child and school is key to student academic success and personal growth. Therefore, Carolina Achieve will work to build trusting relationships and partnerships with all families through one of its Four Roots, Home-School Partnership. This process begins with recruitment and extends all the way through when a child graduates in eighth grade. The school will work to establish clear and transparent expectations and communication with all families, including that all members of the school community must contribute to creating a safe, healthy, and positive school environment for everyone. There will be various opportunities to volunteer at the school including, but not limited to, a Home-School Partnership committee (similar to a Parent-Teacher Association - PTA), volunteer positions (lunch/office/classroom aide), and school events. As part of the Student Success System, every student will be assigned a Success Coach (one of their teachers). The educator acts as a super advisor who is the parent's main point of contact at the school regarding their child. Parents will be strongly encouraged to attend all student-led conferences, learning showcases, and conferences. The school will also provide opportunities for parents to provide feedback throughout the school year. We know that English will not be the first or even second language for some families, so we will work to provide communication in multiple languages, including Spanish, and recruit teachers, staff, and families to help with translation and interpretation, as needed.

Q180.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.

Carolina Achieve will provide parents with opportunities to learn more about Carolina Achieve's culture, people, policies, programs, and practices throughout the year. These sessions will be offered both in-person or virtually, depending on the topic, interest, or time of year. They allow parents the chance to connect with school personnel, as well as learn more about specific programs, opportunities, and events.

In addition, school personnel will work with the PTA and community organizations to provide adult education opportunities and community initiatives that may include, but are not limited to English language courses, financial literacy, and wellness programs. Offering these services and programs will help to strengthen the school's ties to the local Orange County and greater Triangle communities.

10.7. Admissions Policy

Q181.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

Q182.Please provide the following: 1) A thorough explanation of how the specific mission of the school, as set forth in the application, requires the utilization of the weighted or limited lottery



Carolina Achieve wants to provide equitable access to a high-quality education that is founded on its four roots of a strong academic foundation, Habits of Success, well-being, and a Home-School partnership, to all students in the Triangle community. Access to a school built on these four roots has the ability to increase a student's ability to achieve their academic, personal, and professional goals, and ultimately have a positive impact on the greater community. The school plans to use a 50% weight for Educationally Disadvantaged students for each equivalent grade level to ensure equitable access. Carolina Achieve will follow the Educationally Disadvantaged status as outlined by the North Carolina Department of Public Instruction. The North Carolina Department of Public Instruction is at time of application defining Economically Disadvantaged status as: Any student identified by a Public School Unit (PSU), meeting the criteria of Directly Certified, Categorically Eligible, or a method consistent with state or federal guidance for financial assistance regardless of participation or eligibility in the National School Lunch Program (NSLP).

Q183.2) A thorough description of the processes and procedures the applicant intends to use to effectuate the lottery.

Carolina Achieve school leaders will work to identify the number of Educationally Disadvantaged (ED) seats available in each program, class, grade level, or building in order to balance students admitted across total seats available and school resources with an overall school target for free and reduced lunch enrollment of 20% of available seats per grade level, for each enrollment period.

Parents and guardians will have the opportunity to complete an optional form, separate from their lottery application, where they can offer information to determine if a student is eligible for Educationally Disadvantaged status. This supplemental form will ask applicants to consent to the verification of eligibility by Carolina Achieve staff and will request no information other than that required to establish eligibility status. The information provided will not be retained for any purpose other than to provide the auditability of the lottery's integrity.

As mentioned above, Carolina Achieve will follow the Educationally Disadvantaged status as outlined by the North Carolina Department of Public Instruction. The North Carolina Department of Public Instruction is defining Economically Disadvantaged status as: Any student identified by a Public School Unit (PSU), meeting the criteria of Directly Certified, Categorically Eligible, or a method consistent with state or federal guidance for financial assistance regardless of participation or eligibility in the National School Lunch Program (NSLP).

Q184.3) The underlying research, pedagogical, educational, psychometric, and legal, that supports the request and the procedures the applicant is requesting.

Carolina Achieve wants its school community to reflect the greater Triangle community. In order to do so, the school is requesting a weighted lottery because it will help remove barriers from Educationally Disadvantaged Students, which include subgroups of students that might be under-resourced compared to community members who are not Educationally Disadvantaged or belong to groups that have been historically and persistently marginalized and excluded from educational opportunities. The school's Student Success System will use proven methods to ensure that all students learning, emotional, and physical needs are both met and used to create attainable academic, personal, and professional goals in tandem with Home-School partnership. Carolina Achieve believes and research supports that diversity in identity, background, thought, and ability enhances the community and leads to a greater sense of belonging, an increased achievement for all, and a stronger sense of empathy. These three characteristics drastically increase the chances of a student's ability to achieve their academic, personal, and professional goals.

Q185. 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.



Starting in May 2023, the school will begin the next phase of its informational campaign to gain increased interest in the school. Media Integrations, the school's marketing firm, will lead this campaign and utilize various methods to create public awareness for the proposed school. Methods may include but are not limited to, mailing lists, social media, newspapers, radio, houses of worship, preschool and daycare centers, and community recreation facilities. Community meetings and open houses prior to the beginning of the admissions and enrollment process will share Carolina Achieve's mission, vision, and values with interested parents and community members and inform the public of the enrollment period.

Following the preliminary approval of the charter, the marketing campaign will add the tentative open enrollment period. This period will begin in February 2024 (or as permitted after SBE approval) and will tentatively run through April 15, 2024 at 5:00 P.M. Prospective families will be able to fill out Carolina Achieve's application both online and in print form, in both English and Spanish. Once the enrollment period closes, the school will hold an enrollment lottery in accordance with NCGS 115C-238.29F(g)(6).

Carolina Achieve's application will require families to submit basic information: Parent/guardians' names and contact information (address, phone number, and email); Student's name, birthdate, and projected grade level. To be considered for the 50% weight for the lottery, any student who qualifies for economically disadvantaged will qualify to be placed in the weighted lottery - students can complete the economically disadvantaged form during admissions.

Upon SBE approval, the school will set a date for the lottery. Parents and guardians who completed their enrollment within the enrollment period will be notified of the date and time of the lottery. This date will be no more than three weeks from the close of the enrollment period and will only include the names from the enrollment period noted above.

The lottery will be open to the public and names will be decided by a computerized randomization system in accordance with policies adopted in the North Carolina Charter Schools Act and by the State Board of Education. The parent or guardian of a student whose name has been chosen will have ten business days, at 5:00 pm, to officially respond to their child(ren)'s acceptance of admission.

As set forth in NCGS 115C-238.29F(g)(5a), Carolina Achieve will comply with the following:

- For every year of operation, children of the active board members and full-time staff members will receive priority admission, up to 15% of the total enrollment;
- Multiple birth siblings will be entered into the lottery as one surname, and should that surname be chosen in the lottery, all will receive admission;
- After the first year of operation, siblings of current students will receive priority admission;
- Siblings of students who have completed the highest grade level offered by that school and who were enrolled in at least four grade levels offered by the charter school or, if less than four grades are offered, in the maximum number of grades offered by the charter school.

Based on the current waiting lists at other local charter schools in Orange and Durham Counties, we anticipate developing a waitlist of students. If an enrolled student withdraws at any point prior to or during the school year, the next name on the waiting list will be offered a seat and that student's parents or guardians will be given one business day to respond. The Director of Operations will develop a process to maintain effective student records and transfer documentation in a timely manner. If parents or guardians decide their student will transfer schools, they should immediately notify the school. School personnel at Carolina Achieve will provide verification of the withdrawal in a letter addressed to the parents or guardians. Once the letter is submitted, that seat will be open and if applicable, the waitlist will be used.

If a student is transferring into Carolina Achieve, records will be requested from their previous school once a completed application is on file and enrollment paperwork has been completed.

10.8. Certify

Q186. **This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.**

- Yes
 No

Q187. **Explanation (optional):**





11. Operations

11.1. Transportation Plan

Q188. 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

Carolina Achieve is focused on enrolling a student body that reflects the socio economic makeup of the Triangle area. A key component of that effort is the provision of bussing. To that end, our working assumption is that 50% of our students will require bussing. We will evaluate student clusters and routes that make this most efficient. We will use software solutions to aid us in the route designs. That said, since we don't know exactly where our students will come from, we cannot say with any certainty what the exact costs will be.

We have estimated costs in year 1 with the following assumptions.

Three busses will be required for the 200 students assumed to need bussing. Each bus will travel 100 miles per day and gets 8mpg. Bus Capacity is 50 students per bus. Drivers will be contracted at \$30/hour. The Bus cost is \$5,000 each if purchased used (currently there are a lot on the market at that price). Therefore:

Driver Cost (3):	\$42,500
Diesel:	26,000
Bus Cost	15,000
Total	83,500

We are assuming a total cost of \$100,000 for bussing. This leaves \$16,500 for License Title and fees or a new bus in case one needs repair.

For the budgeting purposes, we note that with 200 students requiring bussing, our total bussing cost is \$100,000. This is \$500 per bussed student per year.

For breakeven analytics (fewer students) and for scaling to more students, we use this \$500 per student per year to figure the cost of busing at both higher and lower student populations. We have looked at busing costs for schools around the country and in NC. This \$500/student is in line with costs elsewhere.

11.2. School Lunch Plan

Q189. 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.

Like transportation, free and reduced lunch is crucial to attracting a student body that is representative of the economic distribution of the Triangle. For example, Durham Co has 13% of its citizens living below the poverty line and Orange Co has 12%. In addition, students will forget their lunch at home from time to time. We will insure that they are fed as well.

Carolina Achieve will contract with an authorized caterer for the NSLP. There are at least 3 in the area. We estimate that 20% of our students will qualify for free and reduced meals costing us \$5.50 per day per qualifying student. In addition, we will have 50% of our operation's director's time and benefits to administer the NSLP services. In our budget for this application, we are anticipating Fund 5 revenues of 80% of the \$5.50 food costs. So, the net cost of the program is \$58,000 in year 1. This scales as the number of students increase.

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

Q190. 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 Template...

Applicant Evidence :

CA - CSAB app Insurance Cove...

Uploaded on 3/11/2023 by john
oxaal

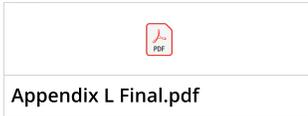
Q191. Attach Appendix L: Insurance Quotes

• 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 :



Uploaded on **4/19/2023** by
Lauren Watters

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.

Q192. **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

Q193. **Provide a detailed start-up plan for the proposed school, specifying tasks, timelines, and responsible individuals (including compensation for those individuals, if applicable).**



Carolina Achieve began formal board meetings October of 2023. Key issues discussed/resolved have been, election of additional board members, adoption of by-laws, identification of the head of school, our location, our mission, outreach to minority communities, student recruiting, and the harmonization of our offering with parent input. If all goes well, Carolina Achieve will be granted its charter in January of 2024. This leaves insufficient time to be Ready to Open by August of 2024. Therefore, the Board and Head of School for Carolina Achieve will begin our Ready to Open Process in May of 2023, after our application is in.

First and foremost, we have to get our board up to as high a level as possible. Carolina Achieve has a super high-quality board. However, not everyone on the board is an old hand at Charter Schools. We recognize that we need training and team development. So we will participate in NC DPI's "Professional Development Program" beginning in September of 2023. In addition, we will seek governance and legal experts to provide additional professional development while relying on mentors we have identified to ensure we are making sustainable and mission focused long term decisions.

Second, Part of the opening effort is breaking down the RTO process into individual "to dos". Much if not most of the requirements for the December 2023 RTO report have been done. We have sourced vendors and have had preliminary conversations regarding many of the operational issues such as National School Lunch Program, Bussing, before and after school care, accounting, finance and insurance. As soon as we get our charter we will choose vendors and push on the long lead items. We will talk about some of the specifics of these efforts below.

Before doing that, however, we need to discuss the two issues that are less well defined and less in our control, the recruitment of students and staff.

Marketing and Student/Staff Recruiting is an ongoing process. Carolina Achieve already has a well-developed web site (Carolina-achieve.org), marketing basics such as logo and color scheme, on-line presence and an active parent engagement process (see the attached flier). This effort will continue to ramp into the fall with meetings at Churches, Preschools and Community Events. If our Charter is granted in January of 2024, we will go full blast with our web presence and student outreach. Ultimately, it is our goal to obtain 150% applicants per grade level to ensure we are 100% enrolled on day one.

Later in the summer of 2023, Carolina Achieve will broaden this effort to include teachers and professional staff. The effectiveness of the school will be significantly enhanced by inputs from these groups. Moreover, we need to be in a "pre-recruiting" phase in order to attract the best professionals. We will begin interviewing interested staff in the Fall of 2023 and working with recruiting web sites.

Some specifics on key issues are given below.

A key hire in this efforts is an Operations Director. We will begin an informal process to identify candidates for this job in the fall of 2023.

Our contracted builder, Hubrich will break ground in the Summer of 2023 for WTHS. We will monitor the progress on this effort closely. If, it looks like our facility will be delayed we will activate our Facility Plan B for modular structures in the Spring of 2024. Hubrich has implemented this plan in the past.

We anticipate providing busses. Once we begin gathering prospective enrollment information it will allow us to begin looking at potential cluster stops and bus routes.

We have identified two entities who provide before and after care at reasonable costs. We will begin the interviewing process with them over the summer of 2023.

Q194. 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.



The biggest challenge facing the Board was the recruitment of our Head of School. The success of our efforts (like the success of most operations) depends most heavily on the leadership. Great Leaders attract and inspire great team mates. In Tiffany Alrefae, we think that we have attracted just such a leader. She has huge energy and bandwidth. She is a natural leader. She has a 20-year teaching and administrative career that spans from NYC Public Schools to Private Schools in Jordan to Public Charter Schools in Orlando. She has two start-up schools to her credit. She has taught most subjects in most grades from K-12. We discuss her throughout this application. With our help, she will create a school that is a model for success in educating our children.

The second biggest challenge in starting a Charter School is the location. We spent about 9 months searching for a location. The positive side of the search is that we began to understand good locations (in terms of site characteristics such as traffic, drainage, utility availability, cost to transform a building into a school, financing possibilities, and location) from not so good locations. Finally, we found our site on Lawrence Road as discussed.

The third biggest challenge for us is the sheer magnitude of the effort. We have to start and manage a complicated enterprise directed towards one of the most important imperatives of society, the education of our children. Accomplishing this large task requires three elements: knowledge, planning and organization. These are discussed below:

Knowledge

We are learning and gaining knowledge from a variety of sources. First, Tom Miller and Lauren Waters at Leaders Building Leaders are helping us to understand what we have to do and directing us towards other sources for more detailed information. They will continue to help us after the application process. Second, Kathy Davies of Acadia Northstar is helping us with Budgets and financial projections. Acadia will be our in school accountant and interface to the student information portal once school starts. Third Bob Bedi of Media Integrations has helped us greatly with marketing material generation, and outreach. We will continue to use them as well. Fourth, we are working with Insurance People to develop our insurance program. We will continue with them also. Fifth, we are working with Emerge Consulting Group to understand our technology infrastructure needs and the technology needs of our students.

We have spoken with the Heads of School many charters in the area and around the country. They have been unfailingly helpful and generous with their time. This feedback is invaluable. We will also lean on the board of West Triangle High School who has agreed to mentor us. The North Carolina Charter School Alliance has been quite helpful as has been the National Alliance. We will continue with them as well.

Planning and Organization

On the planning and organization side, in early May, we will develop a detailed plan based upon the checklist in the "Ready to Open Framework". We will divide the tasks up and put individual board members in charge of overseeing the execution of them. Many of the items on that checklist have already been done or are in progress. Moreover, we have studied this checklist and think that it is well within our abilities to get them all done and tested within the timelines of the RTO process.

To date, Carolina Achieve has raised \$205,000. We will raise a similar amount in 2023. In addition to that, we have applied for grants that are in excess of \$310,000. We will continue to apply for grants at the current rate. We understand that getting grant monies is uncertain but we also understand that the more that we work on this effort, the greater our chances of receiving some. Finally, we will be raising money. Jeff Clark, who spent 10 years raising money for Duke, Duke Cancer Center and Duke University Medical Center will lead these efforts.

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.

Q195. 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.

Hubrich Construction has purchased an 80 acre parcel on Lawrence Road in Eastern Orange Co. near the Durham Co line. This parcel will have on it: West Triangle High School (a replicate of Research Triangle High School) who have had their charter approved, Carolina Achieve, and approximately 40 acres for playing fields for the town of Hillsborough. A preliminary site plan is attached. Also attached is a letter from Hubrich discussing our relationship. Traffic studies have been completed. Utility connections to the parcel have been approved. In May, final approval from the Orange County Commissioners is expected. The construction of the High School will begin in the summer of 2023. The occupation date will be July of 2024.

Carolina Achieve has two options, first co occupy WTHS as discussed below. Second, prepare the site designated for Carolina Achieve to accept modular structures and use them. With the Help of Acadia Northstar and Hubrich Construction, we have evaluated both options financially. Both sites work financially at our target student population and at a population of 300 students.

Option 1, WTHS

The High School building will not be fully occupied for the first two years. Carolina Achieve is in discussions with WTHS to occupy parts of the first floor of the High School Building. It has 36,000 sq. ft. of educational space plus an attached gymnasium and cafeteria. This will make a nice temporary home for CA.

In the summer of 2025 (year 2), CA plans to begin construction of CA's permanent facility. The construction cost estimate is \$275/sq ft. This number sounds high. For example Discovery, which is 14 miles or so away cost \$195/sq ft. to build about 4 years ago. However, inflation in construction costs is severe. Given that, it is best to make conservative assumptions at this time and begin the value engineering efforts up front. Assuming \$275/sq ft, CA can have a 900 student school building constructed for \$13.5M. At 7% interest and a term of 35 years (see below) this would cost CA about \$1.2M per year.

Given the current state of the municipal bond market for charter schools, Carolina Achieve has been advised by Specialized Public Finance (over 50 charter school clients), Inc. that it can raise money for its permanent home on the property in the spring of 2025 assuming we successfully recruit students in the 2024/2025 school year. This would give Hubrich time to build Carolina Achieve's permanent home by the beginning of the 2026 school year.

Option 2

Modular structures have a much shorter lead time. After we get our charter, we can decide in January/February of 2024 to go the Modular route and still be ready to open in August. The economics of the modulars are well known. About \$250k of modular site work per 200 student unit (for electric switches, outdoor housings, sewer hook ups etc.) is necessary. Site prep, Modular set-up and rental costs will also have to be paid. The site prep work (grading, roads, pick up/drop off lanes, sewer lines and so forth) is work that must also be done for our permanent building.

The transition to the permanent building is the same as Option 1.

Hubrich has completed 33 schools in North and South Carolina. This number includes 4 schools in our immediate area, Falls Lake Charter, Eno River Charter, Discovery Charter and Voyager Academy. They are well aware of the Orange County and NC requirements for traffic engineering, zoning, fire, health and certificates for occupancy.

Q196. 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.



Carolina Achieve is working with Hubrich Contracting to secure both short and long-term facilities, see Appendix __. Hubrich Contracting owns property in Orange County, NC, and that is where both short and long-term facilities will be located. When the long-term facility has been completed, students and teachers will only need to move to a different building on the same property. Both locations will ensure that students and teachers are provided with the necessary spaces and resources needed to have a safe, healthy, and positive learning environment, and where all school operations can happen successfully.

Short-term - There are two options, on the same property, for the short-term facility. The number and type of classrooms will support the projected enrollment for the first three years of operation.

1. The first option is that West Triangle High School has agreed to lease us the first floor of their building for 2 years, until our long-term facility is completed. Carolina Achieve will operate on the first floor and have use of classroom spaces and common areas that support working with the number of students outlined for the first three years and our mission.
2. The second option would be to install modular classrooms on the same site in a different location on the property. Hubrich Contracting works with a number of providers and will execute memorandums with them to provide temporary facilities if needed.

Long-term - The facility designed by Hubrich Contracting will support the mission of the school, number of classrooms and total square footage for total enrollment when at full capacity - 900 students, and enable teachers to offer programs and instruction that are learner-centered. The spaces will be both flexible and multi-use. This type of learning environment supports the four roots of the school in the following ways:

Strong academic foundation - The ability to use classroom and common space in many different ways enables teachers to be responsive to every student's learning needs and the curriculum, instruction, and assessment. These spaces will encourage collaboration through the flexible room and seating options that enable students to learn as a whole group, in small teams, and individually. They will also promote a sense of community, as the school will gather in many different forms throughout the year to build school culture and enhance the classroom experience.

Habits of Success - The Habits of Success require that students are given opportunities to work independently from their teacher and sometimes their other classmates. Spaces will be designed to support this growth through designated areas, but also allow for developmentally appropriate oversight by the teachers to guide them when necessary.

Well-being - Students learn best when they are in a school environment that is safe, healthy, and positive. This means that they feel seen, heard, reflected, respected, supported, and valued. In order to achieve the previous statements, the students need to have opportunities for both connection and reflection. The multipurpose and flexible spaces enable students and teachers to change the space based on the intended use and outcome.

Home-School Partnership - The Home-School Partnership is an integral part of our school with the ability to be the catalyst for student academic success and personal growth. All of this starts with the Student Success System. The layout of the school will enable Success Team to meet every morning and at lunch, and then provide opportunities for small group work and individual conferences between each student and their advisor in the afternoons. It will also promote effective student-led conferences with students' families.

Q197. 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.



Carolina Achieve will work directly with Hubrich Contracting in the design of the long-term facility. Hubrich Contracting is a leader in designing charter school facilities and will provide its expertise as the plans for the facility are being developed. The school leadership and board members will also continue to conduct school (public, charter, private) visits at other schools with similar age groups and missions to ensure that Carolina Achieve's long-term facility both meets the mission of the school and is up-to-date on the best practices for facility design related to optimal student learning and personal growth. The school design will include all the facilities needed in order for the successful implementation and operation of its program, including but not limited to spaces that will be used for enhancing and complementing its programs in literacy, mathematics, science, social studies, Exceptional Children, world languages, fine and performing arts, physical education, entrepreneurship, community meetings, and common areas. In order to ensure that the teachers, staff, and families are supported, the school will designate areas including, but not limited to the main office, faculty workspace, meeting space, and supplies/storage.

Q198. 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.

Carolina Achieve will pay rent to West Triangle High School in year 1 and year 2. We have not finalized and memorialized a price per foot yet. For option 2, the cost (not including the site prep – which is recouped for the permanent building) is \$340,000 for 400 students, which is approximately 8% of revenue.

Carolina Achieve had to work really hard to find a place at all. Carolina Achieve either visited or reviewed all commercial buildings in the area that were on the market. Most of the buildings in the desirable locations including ones that had housed schools before were not interested in having a school move in. For example, we contacted the owners of the building that Kestrel Heights school occupied (would have been perfect). They informed us that the best use of the building and land at this time are for corporate office space and in particular mixed wet lab space/office space for biotech companies.

The lowest cost buildings were \$18 per foot NNN (triple net – meaning that utilities, taxes and so forth are not included in the base rate and would be paid by CA). Moreover, estimates of the cost to modify buildings large enough to accommodate 600 students were in the \$1M range. Before work could commence, expensive and time consuming traffic studies would have to be done and re zoning hearings would have to be held. This would add a year to the project. And, 600 students is 30% fewer than CA would like to have.

We also looked at a building that housed the upper grades for Healthy Starts Academy. This school was unavailable until 2025, would only house 250 students and was approximately double the cost per foot.

We also looked for land that could serve first as a place for modular structures and then as a site for our permanent school. We spent about 5 months on this track. We could not find land that was large enough and low cost enough that also drained well and had access to sewer and water in Durham Co. We had the help of a great commercial real-estate broker in this effort.

If the board of Carolina Achieve decided that it wanted to open another school at some time in the future, our approach may be different. If our first effort is successful, we would have access to the municipal bond market prior to opening our school rather than opening with limited financing, proving our success, raising money and then building our permanent facility.

Q199. 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.

Our contingency plan is Option 2 mentioned above. Many things could push out the availability of WTHS to us or the construction of our permanent home. We will have to make a decision that is well within the lead time of modular structure construction if the WTHS schedule pushes out. If we are forced to pursue plan 2, there will be little or no constraints on our educational offerings. The most immediate impact would be the loss of large indoor gathering spaces and there will be constraints upon our meal program. That said, many schools have begun their history in modular structures and have been quite successful.

Q200. Describe the board's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.



No one on the board has managed the construction of a Charter School. Tom Nechyba's school, Excelsior Academy got really lucky and was able to purchase a beautiful building – the former world headquarters of the Liggett Group. However, they did do extensive modifications over the years. Charles Lopez's school in Miami/Dade was built prior to his arrival.

That said, John Oxaal and Jeff Clark have collectively been on the boards of 30 companies who grow and move often. Many times this involves a building or renovation process that is monitored by the board. In addition, John and Jeff are on the board of a charity that is doing a 7 Million dollar building project. As a CEO, John Oxaal has been involved in two companies that had to extensively renovate a building. Finally, John Oxaal co-owns a residential real-estate company that buys, renovates and rents out single family homes. He has become quite familiar with local codes and contractors.

However, schools are different than offices or single family homes. The safety, traffic, health, drainage (due to the large amount of impermeable surface), and utility issues to name a few require up front thought and monitoring. WTHS will be primarily responsible for this activity for our first home. CA will work with WTHS to ensure that any special needs of our students (especially the kindergarten and first graders) are met. CA will work the problem by forming a small committee of the founding board to monitor the planning and the progress. This committee will involve an outside expert. CA will also form a small committee of the board to work with the architect and builder (Hubrich) for our permanent building.

11.7. Certify

Q201.I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
- No

Q202.Explanation (optional):



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.

Q203. **If applicable, attach as Appendix M: Revenue Assurances. Assurances are needed to confirm the commitment of any additional sources of revenue.**

Not Applicable

Q204. **Attach as Appendix N: Proposed Budget for Year 1 through Year 5** [Click here to access and download the Budget Template. \(https://www.dpi.nc.gov/copy-charter-application-budget-template-012023xlsx/download?attachment\)](https://www.dpi.nc.gov/copy-charter-application-budget-template-012023xlsx/download?attachment)

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

Applicant Comments :

- 1) The \$100,000 for busses in year 1 is the total cost of bussing assuming 50% of our students require bussing and the total cost is \$500/student/year. The justification for this cost per student is discussed in the Transportation section.
- 2) The \$60,000 for Child Nutrition is the net amount of our total costs including emergency meals and the Fund 5 reimbursements. We are assuming 20% of our students will need \$5.50/day in child nutrition funds.
- 3) We will have Acadia Northstar as an outsourced financial service provider. Conversations with them has led us to budget a full time clerical position for their support

Applicant Evidence :



Charter Application Budget Te...

Uploaded on **4/25/2023** by **john oxaal**

12.2. Budget Narrative

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

Q205. **How was the student enrollment number projected?**



Carolina Achieve plans to start with 100 students each in Kindergarten and 1st grade. 2nd, 3rd, Fourth and 5th grades will have 50 students each for a total of 400 students. The reason for 100 each in K and 1 is twofold.

First, it is easier to recruit students at that level since they haven't established relationships with a school or with students and teachers at a school.

Second, we have decided that we would prefer to overweight the earlier years because we will not be getting students who have already begun to slip behind grade level. We want to have grades 2-5 because it will make it an easier decision for families with more than one child to enroll all of their children at the same school. The reason that we are not taking more students in 2,3,4 and 5 is that we anticipate a higher degree of remedial learning. That said, our school day will have up to 3.5 hours per day devoted to reading and math. This focus will help bring students who are behind up to speed and it will allow students who are at grade level to accelerate.

Q206. Provide an explanation as to why you believe there is a demand for the school that will meet this enrollment projection.



There are four major reasons to support Carolina Achieve’s enrollment projection: overcrowding at local elementary and middle schools, low proficiency rates for students from groups that have been historically and persistently marginalized and excluded, an increase in population due to families moving to the area, and waitlists at local charter schools. (See attached feasibility study)

Overcrowding at Local Elementary and Middle Schools

Overcrowding is a significant issue in many local schools in Orange and Durham Counties. Many classrooms are filled beyond their intended capacity. This can negatively impact the quality of education, as teachers may not have enough time to give individual attention to students or have access to enough resources to provide a well-rounded curriculum. The local school districts are trying to help solve this problem as well as make the current schools more inclusive by redistricting, but this will cause thousands of students to need to transfer schools after starting kindergarten at their assigned schools. As a result, families are likely to look for alternative options, such as a new school, that can provide a better learning environment for their children.

Below are examples from the North Carolina Department of Public Instruction for the 2020-2021 school year:

School	County	Rating	Capacity	Enrollment
Efland Cheeks	Orange	C	502	561
River Park	Orange	D	455	522
Creekside	Durham	D	686	782
Hope Valley Elementary	Durham	D	575	602

While both counties are working to address this issue, they cannot build schools or redistrict areas fast enough to address the increase in population. The goal of redistricting is to increase equity and access, while also redistributing enrollment throughout the county. However, redistricting will also cause unrest for students and families, as over 2000 students will need to leave their current school to attend one in another neighborhood. When parents have the option of choosing between crowded classrooms with limited individual focus on their children, or a school with lower class sizes and a more personalized teaching approach, the choice is self-evident. (See Orange County Capacity and Long Range Report attachments)

Low Proficiency Rates

Students who belong to groups that have been historically and persistently marginalized and excluded are currently not meeting proficiency standards set forth by the state board of education for mathematics, reading, and science in grades K-8 based on the Local Educational Agency’s state report card for Orange County, Chapel Hill-Carrboro, and Durham County. These groups include Black students, Hispanic students, students who identify as two or more races, economically disadvantaged students, English learners, and students with disabilities.

The proficiency numbers found on the Local Educational Agencies of Orange, Chapel Hill-Carrboro, and Durham County’s state report cards for the students who identify as being in one of the groups listed above, report that less than 20% of them are considered to be “College and Career Ready” by the state. Students are “College and Career Ready” if they earn a 4 or 5 on the end-of-grade or end-of-course exam by demonstrating a thorough understanding of grade-level standards.

Based on conversations with families who have students that identify with at least one of these groups, they want an additional school choice option for their children. They have indicated that they are more likely to sign up for a charter school lottery or apply for financial aid at a local private school because they feel that their children’s needs are not being met in their current schools, as indicated by the low proficiency rates. They know that as the local population continues to increase there will be fewer options for their children to enroll



at both charter and private schools. (see Appendix A)

LEA	Orange County		Durham County	
	Not Proficient	Grade-Level Proficient, but not College and Career Ready	Not Proficient	Grade-Level Proficient, but not College and Career Ready
2021 - 2022 Proficiency Levels				
Mathematics (EOG 3 - 8)				
White	54%	15%	59%	17%
Black	38%	16%	23%	17%
Hispanic	73%	14%	70%	17%
Two or more races	72%	14%	67%	17%
Economically Disadvantaged	57%	18%	54%	12%
English learners	72%	13%	72%	16%
Students with Disabilities	87%	9%	81%	12%
Reading (EOG 3 - 8)	88%	6%	83%	10%
White	57%	15%	58%	17 %
Black	41%	17%	21%	16%
Hispanic	74%	13%	66%	18%
Two or more races	77%	12%	70%	15%
Economically Disadvantaged	55%	14%	46%	17%
	77%	11%	72%	16%



English Learners	94%	-	88%	9%
Students with Disabilities	89%	6%	84%	9%
Science (EOG 5 & 8)	39%	9%	36 %	12 %
White	23%	9%	10%	6%
Black	56%	9%	43%	14%
Hispanic	48%	11%	43%	13%
Two or more races	37%	-	29%	11%
Economically Disadvantaged	52%	11%	46%	13%
English learners	69%	11%	64%	13%
Students with Disabilities	79%	7%	70%	10%

Population Increase

Orange County and Hillsborough, NC, have experienced significant population growth in recent years. North Carolina continues to attract families to the area due to job opportunities, a lower cost of living, and a better quality of life. According to the U.S. Census Bureau, the population of Orange County, NC, increased by 10.9% between 2010 and 2020, reaching a total population of 149,860. The town of Hillsborough, which is located in Orange County, also experienced a population growth rate of 13.6% during this same period, reaching a total population of 7,560. During the next ten years, both Orange and Durham Counties are going to continue to grow. With Orange seeing a 13.5% increase and Durham seeing an 8.3% increase. This significant population growth has led to an increase in the number of school-aged children in the area, placing a strain on existing schools' resources. While Carolina Achieve will not solve this problem entirely, it will be a key part of the solution for both counties, where there are also extensive waiting lists for existing charter schools.

Waiting Lists at Local Charter Schools

According to the North Carolina Department of Public Instruction's latest available data for the 2021-2022 school year, there were over 7,500 students on charter school waiting lists in Durham County, NC, and over 1,800 students on charter school waiting lists in Orange County, NC. Currently, almost 800 students have applied to The Expedition School for less than 10 vacant enrollments and 1800 students have applied for less than 30 vacant enrollments in Kindergarten at Woods Charter. While most charter schools have designated sibling preference into their lottery weights, many schools cannot honor sibling preference due to the high number of siblings that apply to the school each year. Few if any of these students are taken off the waiting list and matriculate to the school. Instead, they must enter the lottery again the next year and hope that a spot opens up in their grade level.



Based on these numbers and discussions with local parents, charter schools have become a highly sought-after alternative to traditional public schools that are over-enrolled or not meeting the needs of their students; as well as costly private schools where the tuition is far above what middle and economically disadvantaged families can afford to pay for their children. Conversations with these parents in information sessions and through survey data have shown that these parents are frustrated with their limited options and want a school that will prepare their children for both college and career.

<https://www.dailytarheel.com/article/2023/02/city-ocs-boe-0206> (<https://www.dailytarheel.com/article/2023/02/city-ocs-boe-0206>)

<https://www.orangecountyfirst.com/Page/162> (<https://www.orangecountyfirst.com/Page/162>) (4th paragraph - School transfers)

Applicant Evidence :

	
OrangeCountyCapacity.pdf	Long Range Report .Final 5.22....

Uploaded on **4/23/2023** by
Tiffany Alrefae

Uploaded on **4/23/2023** by
Tiffany Alrefae

Q207. Provide the break-even point of student enrollment.

We have done various sensitivity analyses to determine our breakeven as a function of the student population. As one can see from the budget, we have a solid surplus at our target year one population of 400 students. Most of our expenses scale as a function of the number of students. So, at 300 students we are still profitable.

Number of Students	400	300
Revenue	\$4,629,000	\$3,493,000
Expenses	\$4,000,440	\$3, 473,000

Q208. Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.

Most of the expenses (staff, food, bussing, supplies, and capital expenses - capex) in our school are variable. The variability is a function of the number of students. Therefore, we will be able to scale our expenses down if we have fewer students.

The above breakeven (at 300 students) analysis above does not consider several factors that would enable us to get to a much lower breakeven point if our student recruitment effort fell way short. The analysis above assumes the most expensive facility option for 400 students. This option assumes that we are in modular structures rather than West Triangle High School. One of the benefits of modular structures is that they make the structure costs variable as a function of the number of students. The capital budget for desk, chairs and so forth was not done as a function of the number of students. If we had far fewer than the budgeted 400 students we would not have to buy furniture for that many students. By working on our costs in this manner as well as scaling the teaching staff to the number of students we can drive the breakeven point much lower without jeopardizing the core mission of our school.

Q209. 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 Board will aggressively pursue grants and donations. Tiffany Alerefae has already written two grants for a total of over \$300k. We are actively watching for other opportunities to arise.

Jeff Clark and John Oxaal are veteran non-profit board members including: TROSA, NC Council for Entrepreneurial Development, Duke's Pratt School Board of Visitors, Caring House and Grace Cathedral. As such, they are veteran fund raisers for non-profit causes. In particular, Jeff Clark was a professional fund raiser for Duke University for over 10 years. He eventually held the position of Executive Director for External Affairs at Duke University Medical Center, the senior fund raiser for a multi-billion dollar organization. We will aggressively pursue donor funds for our school as well. This will enable us to further improve our educational offerings for our students.

That said, the budget presented here does not incorporate either grant or donor funds. In other words, we will be able to complete our mission using the standard charter school funding mechanisms. This is important because we want to show that we can scale this offering to the benefit of students across the state.

Q210. Provide the student to teacher ratio that the budget is built on.

Grades K-2 will have one teacher and one TA per classroom of 22 students.

Grades 3-5 will have one teacher per classroom 22 students.

Q211. Describe the board's individual and collective qualifications and capacity for implementing the financial plan successfully.



John Oxaal, a University of Chicago MBA, has had a 40-year career in start-up businesses. He was an early employee of Weitek who had their IPO in 1987. He was a founder and CEO of Durham based Volumetrics Medical Imaging in 1992. Volumetrics survived for 3 years before it received any financing by relying on grants from the National Institutes of Health and the National Science Foundation. It went on to successfully produce the first real-time 3D ultrasound imaging system, establish it as the standard of care for cardiac patients and have a successful exit. After that, Mr. Oxaal became a partner at Sevin Rosen Funds a Palo Alto/Dallas based venture capital fund. Mr. Oxaal was a founder/CEO of Ethertronics which has a very successful exit and Luxtera who was purchased for \$660M by Cisco. Mr. Oxaal founded and was the CEO of Duke spinout Element Genomics in Durham who was purchased by UCB, a large Pharma company. In addition, Mr. Oxaal funded an additional 12 small high-tech/life science companies many of which are in existence today. He still serves on the Board of Directors of 4 companies that he has been with since the start-up stage. Mr. Oxaal is often on the audit committee of these companies and understands private and public accounting practices.

All small companies have the same financial problems as start-up schools. The revenue for small companies is small which necessitates investment constrained to the areas that have the greatest marginal return. Moreover, the revenue can vary hugely from quarter to quarter for reasons often beyond the control of management. This often necessitates unpleasant choices that need to be made relatively quickly in order to maintain the viability of the business and mission. Schools have similar problems. Mr. Oxaal's skills and experience as an entrepreneur will enable him to guide the Board and the staff to focus on the things that matter in order to provide a great service to our students through our start-up process.

Similarly, since 1994, board member Jeff Clark has been an entrepreneur/investor. He started Aurora Funds, a RTP based venture capital fund in 1994. For nearly 20 years Aurora led investments in over 25 start-up companies and was quite successful in doing it. He was a Co-founder and Board Chair of the Veritas Collaborative which is a specialty hospital for the treatment of eating disorders in Durham, which is now spreading across the country. He was a co-founder and Board Chair of Matchwell which had a quite successful exit. He is on the board of several other companies, which have been start-ups. So, Mr. Clark also has the experience of bringing a start-up operation into existence and growing into something great.

Tiffany Alerefae is the Head of School. She has the experience of founded two successful Schools, Gems Academy in Qatar and King Abdullah Academy in Herndon Va. She has also been a founding teacher at Lemman Manhattan School in New York City.

CA's board members have also successfully started non-profits. Makayla Booker started Wall Street Juniors in Durham and she has started her own successful vending machine company.

Anjanette Miller founded an educational advocacy center in Dallas to bridge higher education access for under-resourced youth. She also was the Executive Director of Audacity Labs an after school club teaching entrepreneurial skills to youth in Durham.

In short, Carolina Achieve's Board and Head of School have all "walked the start-up walk". We all know the intimidation of walking into an empty space without anything in it except for the founding idea in our heads. We have all navigated the ups and downs of the start-up. These shared experiences will enable us to navigate as a team the challenges in front of us at Carolina Achieve.

Q212. 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.

Charter Schools are required by law to accommodate EC students with an IEP. To meet that need, Carolina Achieve will provide two EC teachers in year 1 and an EC TA. The state and the federal government provide funds to help defray the excess costs. In the case that CA has a student or students who are very high need, the cost will have to be borne through our budget surplus. Our survey of charter school administrators has shown that high needs EC students often have this effect.

Q213. 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.



We have selected Acadia Northstar as our financial partner. While few of the CA board have experience as an operator on the finance side of a charter school, Acadia has significant experience in this endeavor. We have become comfortable in their knowledge through their help in the development of our budget but we think they will be even a more valuable partner in the development of the school. CA will have an admin who will work with Northstar. Our basic process will be:

1. All invoices are collected on a weekly basis
2. A package of invoices and supporting materials is approved by the Head of School
3. Acadia Codes the invoices and enters them into our accounting system, which is mandated by the state.
4. Acadia prepares the checks (this can be on-line or paper)
5. The Head of School approves the checks
6. Acadia sends the checks but makes sure that the money requested from all sources is spent within the 3 day limit
7. On a monthly basis Acadia (a different person within Acadia from the one who wrote the check) will reconcile all invoices to the budget and payment.
8. On an annual basis Acadia will send a reconciliation report to the state
9. On an annual basis our Auditor will perform an audit that includes testing of the 3-day rule.

We are interviewing several auditors at this time to become our auditor.

At this time, payroll is done by ADT. ADT has a nationwide charter school practice and is pretty good at it. Benefits ha been handled by McKessen. These decisions are open to revision as we get closer to opening.

Jeff Clark will lead our Audit Committee. He has been the Audit Committee Chair for many private and some public companies. He has the requisite ability to evaluate management decisions and with the whole committee recommend approval to the board.

Q214. 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.

Student accounting will also be done by Acadia using the PowerSchool software.

As mentioned above, CA will start with 2 EC teachers and 1 EC TA. In addition, CA will subcontract OT and PT services for EC students, Psychological Counseling and Speech Therapy.

Custodial Services will also be subcontracted as will Landscaping, Bus Drivers (and maybe busses), and Nutritional Services.

Decisions regarding vendors in these areas will be made by CA staff, discussed with the appropriate committee of the board and then recommended by the committee to the board. For example, staff will study the custodial problem to determine the scope of our need, network with other local charter schools to determine the local vendors, interview the vendors against the scope that was developed, and based upon recommendations, cost and congruence with our scope make a recommendation to the Operations Committee of the Board. If the Operations Committee agrees with the recommendation, they will present it to the Board for final approval.

Q215. Explain how the budget aligns with the school's mission, curricular offerings, transportation plans, and facility needs.

CA's mission is to provide our students a rigorous math, science and reading education over laid by entrepreneurial studies. All the necessary Teachers, Teacher Assistants, curriculum, and staff are included in the budget. Carolina Achieve wants to provide this education for the students of Durham and Orange Counties. For that reason, CA will use a weighted lottery. We anticipate that we have 20% or so of our students to qualify for free and reduced lunch. Moreover, we anticipate that we will need bussing for 50% of our students. For those reasons we have included large budgets for school lunch and transportation. We expect that we will have around 12% of our population composed of EC students. We have budget for EC teachers, OC, PT, Psychological Services, Speech Therapy, and Teaching assistants. We expect that our incoming 2 -5 classes will have some number of students that are not to grade level. So, we have budgeted extra time in the school day for remedial efforts. We have also budgeted 3 additional TAs to support this effort. Finally, as soon as we can afford it, we will hire a social worker to help students navigate difficult situations.

Q216. What percentage of expenditures will be the school's goal for a general fund balance? Describe how the school



will develop the fund balance.

Although we have tried to be conservative on every issue, the budget shows significant surpluses. That is not a bad thing at this point. There will be expenses (like the possibility of unexpectedly high needs student(s) mentioned above) that are unknowable at this time. By having a surplus in the planning stage, we will be able to handle those expenses without having to make difficult trade offs.

Most of our funds will be directed towards the provision of an increasingly enriched experience for our students. Adding organized athletics, for example, is high on our list. That said, unexpected expenses crop up. For that reason, we will push to maintain a surplus every year. We think that 60 school days of the upcoming year's budget is a good number for the surplus at the end of a given year. Given the uncertainties in year 1 and the construction of our permanent school for year 3, it is unlikely that we will meet this goal until year 4 or so. Finally, an endowment would help cushion us against unforeseen problems. In year 4 or 5, we will begin thinking about raising funds for this.

Q217. Provide a description of proposed financing structure. Include financing of facilities, other asset financing, and leases.

Our Option 1 facilities plan will require no financing in year 1 and year 2. Recall from the answers above that we will be leasing unused space from WTHS whose building is projected to be ready by the 2024 school year. Therefore, we will be able to meet all of our cash needs from the funds received from federal, state and local entities based upon our ADM.

As described in the facilities section, in the spring of year 1, we will be in a position (given the current state of the municipal finance market) to obtain financing for our permanent facility. This will be ready for occupancy in year 3.

If for some reason, Option 1 does not obtain, our contractor will improve the land he owns adjacent to WTHS for the purposes of a charter school. He will lease this land to us at a market rate and we will install modular structures. In the Spring of year 1, we will obtain financing for our permanent facility in the same way that we are planning for Option 1.

Q218. 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.

No. That said, we will be looking aggressively for all of the above beginning in the summer of 2023. If we fail in that search, we have the budget for it.

12.3. Financial Compliance

Q219. How will the school ensure adequate internal controls, including segregation of duties, safeguarding of assets, accurate and adequate record keeping?



Carolina Achieve will receive significant funds from Federal, State and Local sources. In addition, Carolina Achieve hopes to attract financial donations from benefactors. All of these groups demand that we are faithful stewards of their resources. Financial Compliance is a set of processes and controls that ensure that we are.

Internal controls start with a process that, to the extent possible in a small operation, ensures the segregation of duties for normal day to day financial operations. That means that different people execute different duties in the processes of ordering materials (and services), paying bills and maintaining records. In addition, the finance system must be organized so that individuals can only access the parts of the system for which they have authorization. We will be working with Acadia Northstar to implement this system. For example, process that we have worked out with them to pay bills is given below.

1. All invoices are collected on a weekly basis by a CA office clerk.
2. The package of invoices and supporting materials is approved by the Head of School.
3. A staff member at Acadia codes the invoices and enters them into our accounting system, in compliance with the Uniform Chart of Accounts.
4. Acadia prepares the checks (this can be on-line or paper)
5. The Head of School approves the checks using a separate access and password from the clerk who prepared the invoice package and the Acadia staff member who prepared the checks.
6. Acadia sends the checks but makes sure that the money requested from all sources is spent within the 3 day limit
7. On a monthly basis Acadia (a different person within Acadia from the one who wrote the check) will reconcile all invoices to the budget and payment.
8. On an annual basis Acadia will send a reconciliation report to the state
9. On an annual basis our Auditor will perform an audit that includes testing of the 3-day rule.

Similar processes must be put in place for other financial activities such as issuing Purchase Orders or engaging in contracts.

In addition to having sound processes the Board must be aware of the financial condition of the School. On a monthly basis the Board will receive the following:

- Income Statement
- Balance Sheet
- Cash Flow Statement
- Enrollment
- Budget vs. Actual Results

From these reports the board will be able to discern good and bad trends and will be able to help the staff to make appropriate responses.

We expect the first year to be especially challenging and we will be working with a completely new team. So, during the first year our Audit committee will meet with our Auditors on a quarterly basis to review the following:

- Processes for reporting student enrollment
- Compliance with the 3-day rule
- Compliance with other state and federal mandated reporting requirements such as NSLP.
- Significant Deficiencies and/or Material Weaknesses in our financial processes and remediation efforts

The Audit Committee will report the results of this meeting to the Board Quarterly. After year 1, CA will evaluate whether this can be done on an annual basis.



Q220. Provide any known or possible related party transactions (relationship, description of transaction, and estimated dollars involved).

We have no related party transactions. Moreover, our legal council has met with the board to discuss governance issues. Related party transactions was a focus of that meeting. We will also train staff on the related party transaction issue.

Q221. 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.

Jacob Allen of Sharpe Patel PLLC gave a lecture to the board on all items required for a charter school Audit and 990 preparations. One of Sharpe Patel's practices is auditing private and public charter schools. We have not chosen an auditor yet. However, Sharpe Patel is on CA's proposed list of Audit Service Providers.

The attached list shows other alternatives.

Applicant Evidence :


CA AUDITOR LIST 2022 0630[2]...

Uploaded on 3/24/2023 by john
oxaal

12.4. Certify

Q222. I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
 No

Q223. Explanation (optional):

N/A



13. Other Forms

Q224. 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 Required Sign...

Applicant Evidence :


Carolina Achieve_Charter Sch...

Uploaded on **4/25/2023** by
Lauren Watters



14. Third-party Application Preparation

Q225. Was this application prepared with the assistance of a third-party person or group?

- Yes
 No

Q226. Give the name of the third-party person or group:

Answer:

As discussed in previous answers, the board and the staff of Carolina Achieve wrote this application. We did have help from numerous individuals and groups including:

Tom Miller - Leaders Building Leaders

Acadia Northstar - Kathy Davies - Budgetary

Media Integrations - Bob Bedi - Marketing

Olivia at Emerge Consulting - IT Infrastructure

Steve Griffin - Insurance

Hubrich Construction - Facility

Q227. Fees provided to the third-party person or group:



Answer:

Leaders Being Leaders - \$7,500

Media Integrations - \$3,000

None of these fees are reflected in the budget. Instead they were paid out of Carolina Achieve's start-up funds.

After Carolina Achieve begins operations Media Integrations will support us with ongoing marketing activities directed towards student and faculty recruitment and raising the profile of the school to the donor population. The first year's budget for this effort is \$30,000.

Carolina Achieve will use Acadia Northstar for ongoing activities related to budgets, accounting and Power School. The cost for both activities is approximately \$140/student in the ADM per year.

Carolina Achieve has received valuable advice from Insurancepeople and Emerge Consulting directed towards the understanding of our insurance needs and handling our IT infrastructure. Carolina Achieve will spend money on these efforts but we have not chosen the vendors yet.

The application has been written entirely by Carolina Achieve staff and board members.

Leaders Being Leaders has helped with reviewing and commenting on the application and insuring that it is high-quality, compliant and mission and research based. While there is no requirement, we will likely use LBL for board development work in the future.

Media Integrations has helped develop our marketing materials and questionnaires for market research purposes. We have surveyed parents and stakeholders. Media Integrations also helped with branding as well as adding to our web site. They have also helped us in community outreach. We will continue to use Media Integrations to help with marketing activities especially student recruitment and community engagement once school starts.

Acadia Northstar has helped us understand budgets for charter schools, reimbursements from various governmental entities, and staff salary levels. We will continue to use Acadia Northstar for financial, student and staff reporting once school starts.

Hubrich Contracting has helped us to understand our options for both temporary and permanent locations, the statutes that govern school development and the financing of public charter schools. Subject to the negotiation of a satisfactory contract, we will use Hubrich to build our permanent school.



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 28, 2023, at 5:00 pm EDT** for Fast Track and Accelerated applications, and **April 28, 2023, at 5:00 pm EDT** for traditional timeline applications. Payments will be accepted in the form of a certified check. Cash is not accepted.

Q228.***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 28, 2023, at 5:00 pm EDT for Fast Track and Accelerated applicants, and April 28, 2023, 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


2023 Payment Form Final.pdf



16. Signature page

Q229. [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


Signature Page.docx

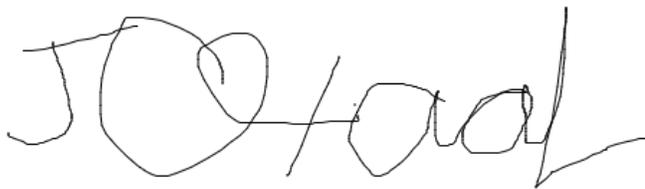
Applicant Evidence :


20230414_125337.PDF

Uploaded on **4/14/2023** by **john
oxaal**

Q230. [Please digitally sign your application here](#)

Signature



Final Status

Reject Approve

Approver Comments

10 Leaps for Twenty-First-Century Learning

Industrial Paradigm

Unequal Expectations & Opportunities

The expectations and opportunities learners experience are determined at a young age and are modest for most, high for some, and disproportionately low for others, too often based on factors connected to a learner's identity and background.

Narrow Focus

Learners engage in experiences focused primarily on the cognitive dimension of learning.

Rote Activities

Learners engage in memorizing and recalling a broad array of content and are assessed primarily on their ability to recall and explain this information.

Irrelevance

Learning is disconnected from young people's interests and goals, as well as the real professional, personal, and societal challenges and endeavors they encounter in life.

Assimilation & Marginalization

Learners from marginalized groups—such as people of color, LGBTQ learners, those living in poverty, multilingual learners, those with a disability, and others—are pushed to either conform to the dominant culture or risk alienation.

Reinforcement of the Status Quo

Learners' experiences are situated within societal structures related to race, class, gender, sexual orientation, ability, and more that are implicitly accepted, directly perpetuated, or studied in ways that do not motivate massive change efforts.

Isolation

Building strong relationships is not prioritized; learners and adults work together in the same space, but often without knowing one another deeply, and teaching and learning approaches prioritize independent work and competition.

Inflexible Systems

Learners experience rigid structures and policies that batch those of the same age together and engage them in the same content through the same activities at the same pace—holding some learners back from more advanced content and activities and leaving others behind.

Passive Compliance

Learners are expected to passively absorb the knowledge, skills, mindsets, and behaviors modeled and taught by adults and are pushed to comply with rules and routines developed for them through extrinsic rewards and punitive consequences.

Siloed Schooling

Learning is largely confined to school—a physical space with a fixed schedule and teachers who take on all, or most of, the responsibility for educating students—and learning outside of school is far more available to those with substantial economic and social capital.

Student-Centered Paradigm

High Expectations with Unlimited Opportunities

All learners experience high expectations and have equitable access to many opportunities, enabling them to progress toward their aspirations for themselves, their families, and the community—regardless of the time and support needed.

Whole-Child Focus

Learners engage in experiences that nurture the totality of cognitive, emotional, social, and physical factors that impact their learning, development, character, and overall health and well-being.

Rigorous Learning

Learners use critical thinking skills to make deep meaning of diverse, complex ideas and are assessed on their ability to apply, analyze, and use their knowledge in creative ways across contexts

Relevance

Learning explores young peoples' interests and goals, is connected to their communities, and enables them to understand and tackle real problems in authentic contexts.

Affirmation of Self & Others

Each learner develops a unique, positive sense of self and purpose as well as a deep respect for the identities of others; these diverse identities are celebrated, nurtured, and leveraged in meaningful and anti-oppressive ways to support everyone's learning.

Social Consciousness & Action

Learners critically examine social problems and work toward a more just world; they develop the knowledge, skills, and mindsets needed to continue taking anti-oppressive actions that disrupt and dismantle racism and other inequities.

Connection & Community

The environment is relationship-rich: learners are deeply known and respected by a variety of adults and peers; collaborate closely; and form meaningful relationships across lines of difference that nurture empathy, foster belonging, support well-being, and build social capital.

Customization

The focus, pace, and sequence of learning, as well as the resources and supports provided, are tailored to each learner's identity, prior knowledge, development, way of learning, and life experiences, ensuring that all learners have what they need to be successful and those who need more receive more.

Active Self-Direction

Young people are active drivers of their learning; they grapple directly with concepts while receiving adult and peer guidance and support; they have a voice in decisions about how and what they learn, so that the process grows agency and meaningfully builds on their interests and prior knowledge.

Anytime, Anywhere Learning

Learning can happen anywhere and at any time for all learners with teachers, families, community members, and other important figures in a young person's life all playing important educational roles.



March 10, 2023

Ms. Ashley Baquero
Director
Office of Charter Schools
6307 Mail Service Center
Raleigh, NC 27699-6307

Re: Carolina Achieve

Dear Ms. Baquero and Members of the Charter School Advisory Board,

I'm writing a letter for support for Carolina Achieve. Hubrich Contracting, Inc. and Carolina Achieve have been discussing a partnership for development and construction of a new charter school. Hubrich Contracting, Inc. would be the developer/contractor for the new charter school located in Orange County, North Carolina and will provide financial support for design, programming, project management and construction. Hubrich Contracting, Inc. has successfully completed 33 projects in North Carolina and South Carolina. We began discussions in December 2022, and Hubrich Contracting, Inc. and Carolina Achieve have been discussing and reviewing finance structures a potential site for the development of this new charter school. Given all the complexities with zoning, traffic, and land availability, Hubrich has been engaged and visited numerous sites in Durham County and Orange, NC. Hubrich-offered insight as to positives and negatives of the different sites to help provide guidance and are in the process of securing the land between Hillsborough and Durham in Orange County. We have been reviewing potential project budgets and the project is realistic given other charter school projects we have been involved with in the past.

Please do not hesitate to call me if you have any further questions. 919-697-5571

Sincerely,

A handwritten signature in blue ink, appearing to read "Steve Hubrich", with a long horizontal flourish extending to the right.

Steve Hubrich
President
Hubrich Contracting, Inc.



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

CAROLINA ACHIEVE, INC.

the original of which was filed in this office on the 3rd day of March, 2023.



Scan to verify online.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 3rd day of March, 2023.

Elaine F. Marshall

Secretary of State

SOSID: 2305798
Date Filed: 3/3/2023 1:06:00 PM
Elaine F. Marshall
North Carolina Secretary of State
C2023 055 02569

ARTICLES OF AMENDMENT
TO
ARTICLES OF INCORPORATION
OF
DURHAM ASPIRE ACADEMY, INC.

Pursuant to Section 55A-10-05 of the North Carolina General Statutes, the undersigned non-profit corporation does hereby submit these Articles of Amendment for the purposes of amending its Articles of Incorporation.

1. The name of the non-profit corporation is Durham Aspire Academy, Inc.
2. The Articles of Incorporation are hereby amended as follows:

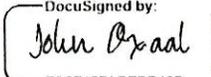
The current text of Item 1 is hereby deleted in its entirety and amended and restated to read as follows:

The name of the corporation is Carolina Achieve, Inc. (hereinafter, the "*Corporation*").

3. The date of adoption of the amendment was February 22, 2023.
4. The amendment was approved by a sufficient vote of the board of directors of the Corporation. Member approval was not required because the Corporation has no members.
5. These Articles of Amendment will be effective upon filing.

This the 22nd day of February 2023.

DURHAM ASPIRE ACADEMY, INC.

By: 
F6C7157A0EFD848B
John Oxaal, Director

Signature Page

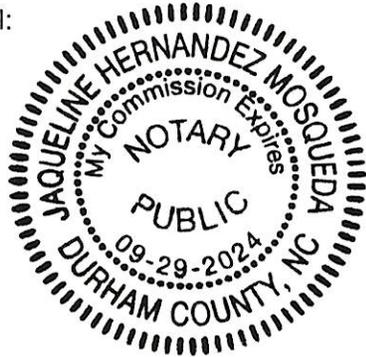
The foregoing application is submitted on behalf of insert name of board of directors for the proposed school. The undersigned has read the application and hereby declares that the information contained in it is true and accurate to the best of his/her information and belief. The undersigned further 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: John Oxaal
Board Position: Chairman
Signature: [Signature]
Date: 4/6/23

Sworn to and subscribed before me this 6th day of April, 2023.

Notary Public: [Signature]
My commission expires: 09/29, 2024.

Official Seal:



Appendix A: Evidence of Parent/Community Support

Carolina Achieve





Evidence of Parent and Community Support

Carolina Achieve (CA) has been consistently educating the community on the mission and vision of CA, the value CA will bring to their community, gathering data in regards to support and enrollment interest, and fostering relationships and support with community partners.

Carolina Achieve has attended and hosted numerous community events and has begun to establish relationships and partnerships. Enclosed you will find a summary of events both attended and hosted, our prospective family interest survey and signed petitions of support data, a comprehensive list of stakeholder meetings, conferences, and guiding conversations that have occurred, as well as letters of support and a feasibility study (prepared by Media Integrations).

Carolina Achieve Events

Below is a sample of the most recent events. Advertisements of these events and future events can be found on the school website and social media platforms.

- Website: <https://carolina-achieve.org/events/>
- Facebook: <https://www.facebook.com/carolinaachieve>
- Instagram: <https://www.instagram.com/carolina.achieve/>
- Twitter: <https://twitter.com/CarolinaAchieve>

CA will continue to promote and foster community partnerships and support beyond charter application submission. As our supporters are able to explain the mission and vision of CA, we feel confident we will be able to gain an even stronger foothold within the community.

Events:

<u>Date</u>	<u>Event</u>	<u>Location</u>
December 5	Information Session	Bahama
March 11	Eno River Farmers Market	Hillsborough
March 25	Easter Egg Hunt	Hillsborough



March 25	Dive for Gold	Chapel Hill
March 28	Focus Group	Chapel Hill Public Library
March 30	Information Session	Say Wear Boutique Hillsborough
April 1	26th Annual First Lady's Walk and Health Fair	North Carolina Central University Durham
April 13	Virtual Parent Information Session	Zoom
April 15	Kick Off to Opportunities	Circle 93 and APlus Test Prep
April 17	Virtual Parent Information Session	Zoom

Carolina Achieve Summary of Interest Survey Data and Petition Data

CA gathered interest data from 161 prospective families which represent 242 students via a survey. Of those 161 families we connected with 74 future students in early childhood, 83 school age students, and 85 students who are older than 4th grade. CA will continue to gather enrollment interest from prospective families beyond application submission.

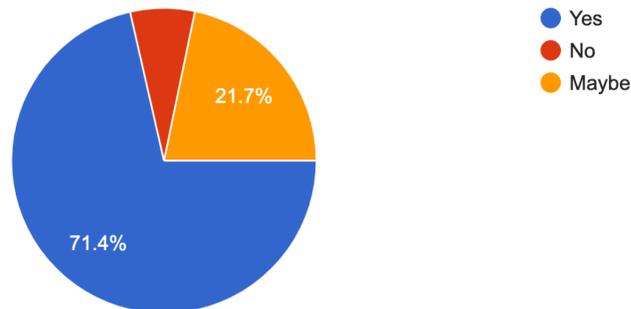
In addition to having prospective families complete our interest survey, we also asked community members to sign a petition to show their support for CA. At time of application submission, we have gathered 43 signatures.



Grade Currently In:	Number of Prospective Students
Child Care/ PreK	74
K	21
1st	18
2nd	13
3rd	18
4th	13
Other	85

Will a NEW public charter school that prepares ALL students for higher education (college) and the workforce (career) add value to your community?

161 responses



When asked, “Why do you think a new charter school will add value to your community?” parents' top choices were as demonstrated below.

Will provide parents and students with expanded school choice.	122 Parents
Will allow students currently on a waitlist at other charter schools to attend a charter	99 Parents



school.	
Will create new professional opportunities for teachers.	82 Parents
Will improve and increase student learning opportunities.	95 Parents
Will widen the pipeline for a more diverse range of students to attend higher education.	90 Parents

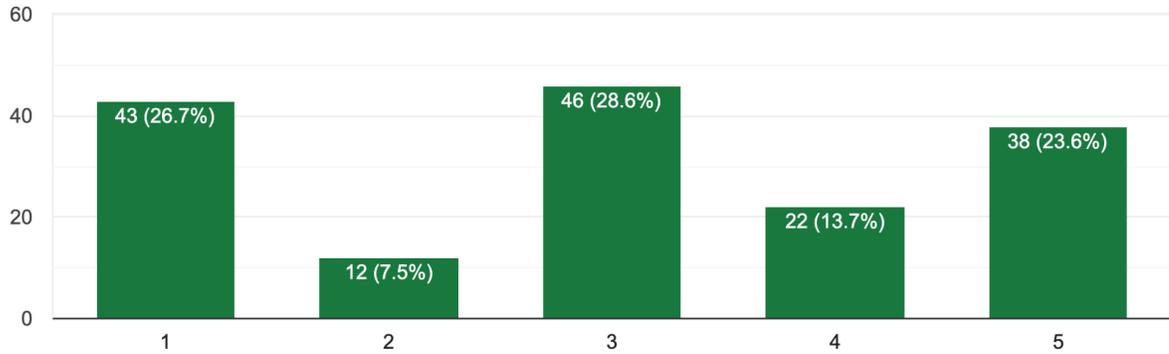
When asked, “Which of the following are important to you regarding your child’s education?” parents' top choices were as demonstrated below.

Challenging academics	123 Parents
Support from highly-trained teachers throughout the educational program	121 Parents
Learning environment that prepares ALL students for success in higher education and workforce	112 Parents
Opportunities for project and profession-based learning	101 Parents



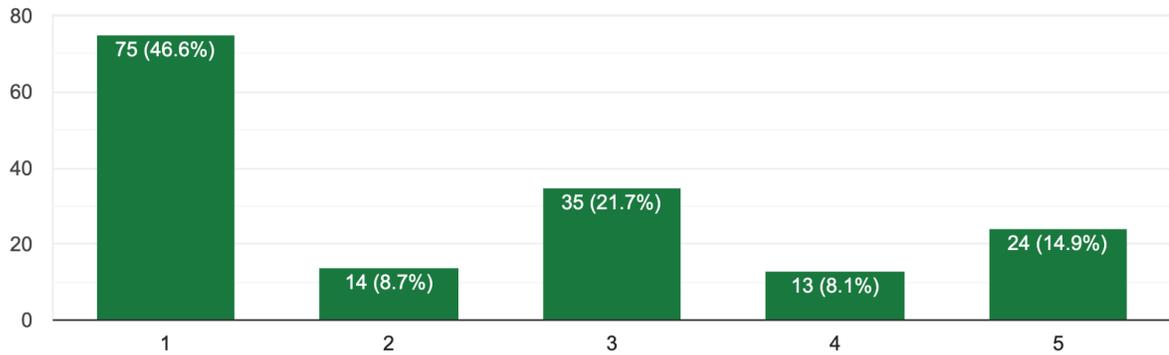
How important is busing/transportation to you with regards to sending your children to school?

161 responses



How important is BEFORE CARE to you with regards to sending your children to school?

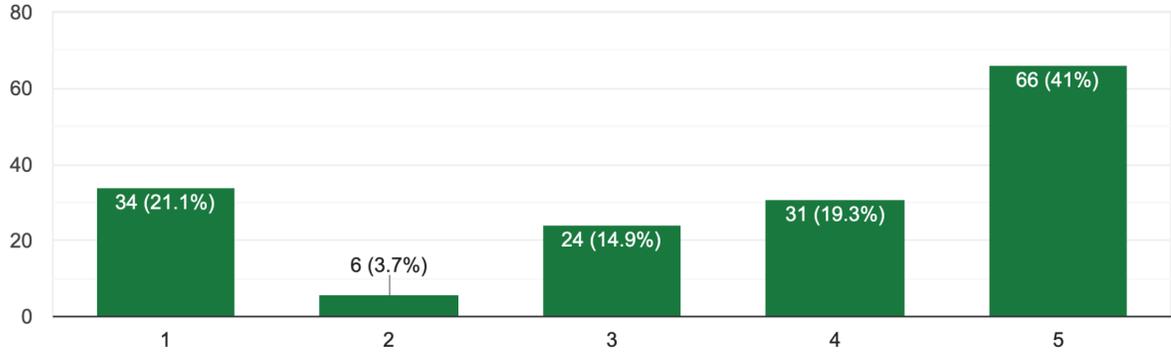
161 responses





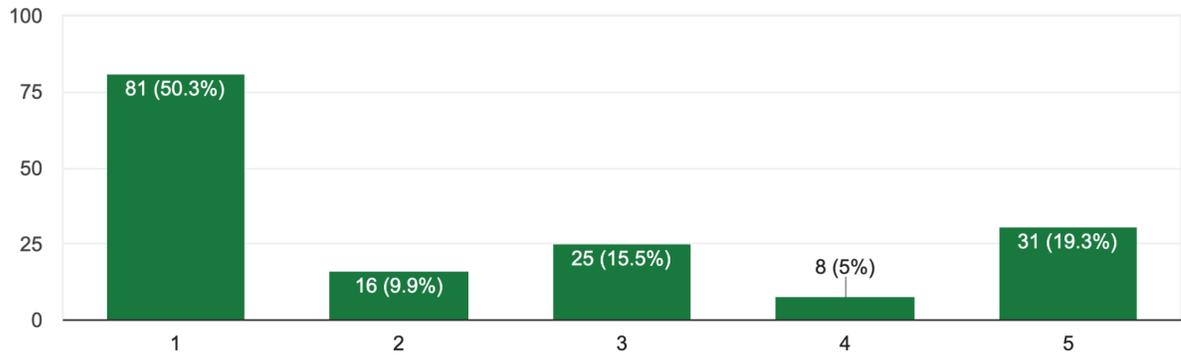
How important is AFTER CARE to you with regards to sending your children to school?

161 responses



How important are FREE MEALS to you with regards to sending your children to school?

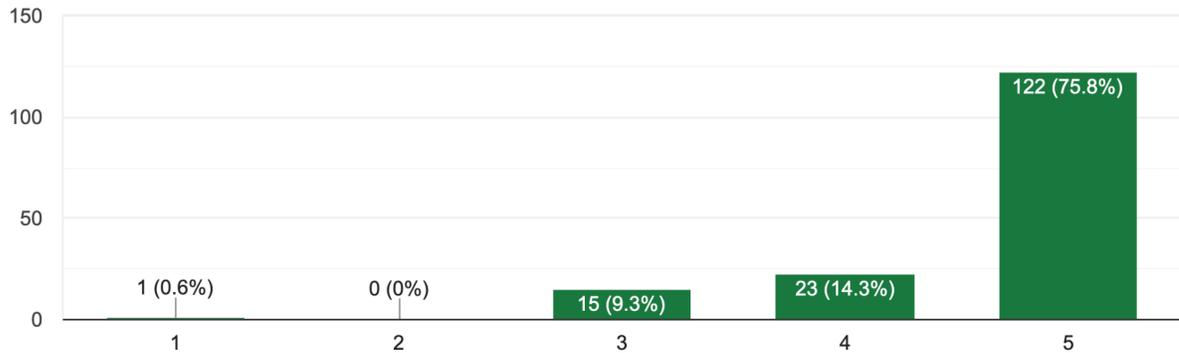
161 responses





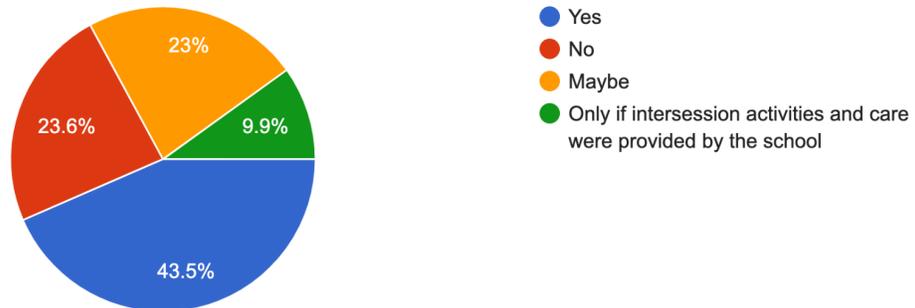
How important is it to prepare students for higher education (college/university) and the workforce (career)?

161 responses



Would you prefer a year-round school schedule to a regular school schedule? A year-round school schedule is divided into 9-week quarters separated ... ends in early June, with a 5-week summer break.

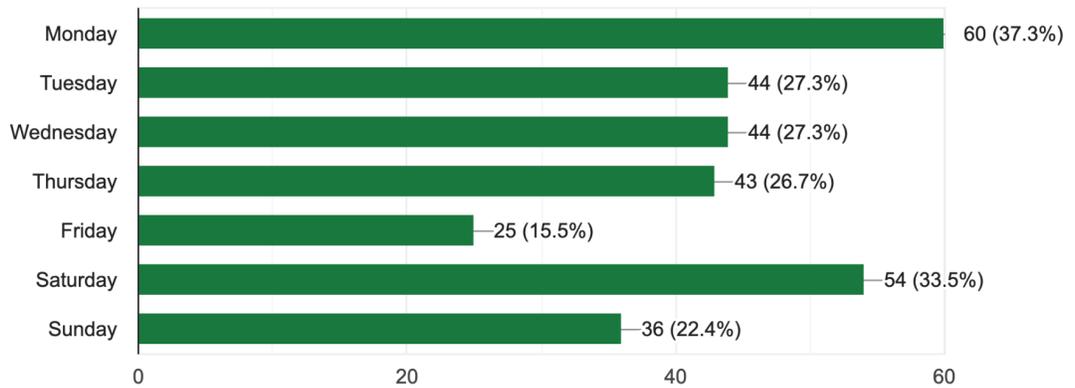
161 responses





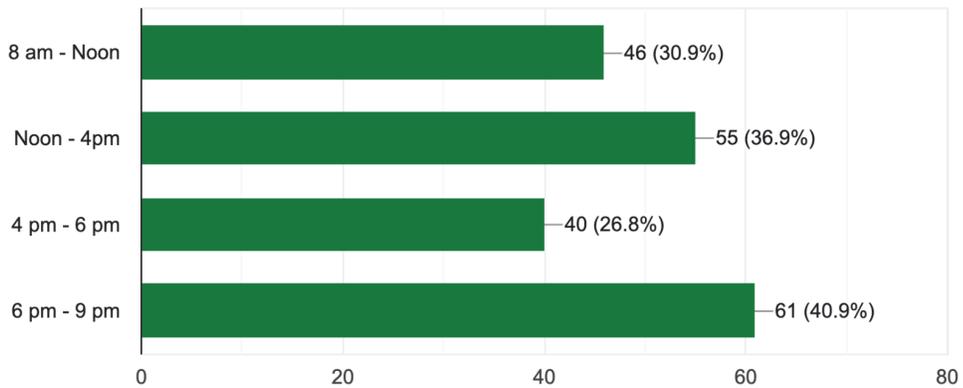
What days would be best for you to attend a community meeting about Carolina Achieve? (Check all that apply.)

161 responses



What time frames would be best for you to attend a community meeting about Carolina Achieve? (Check all that apply.)

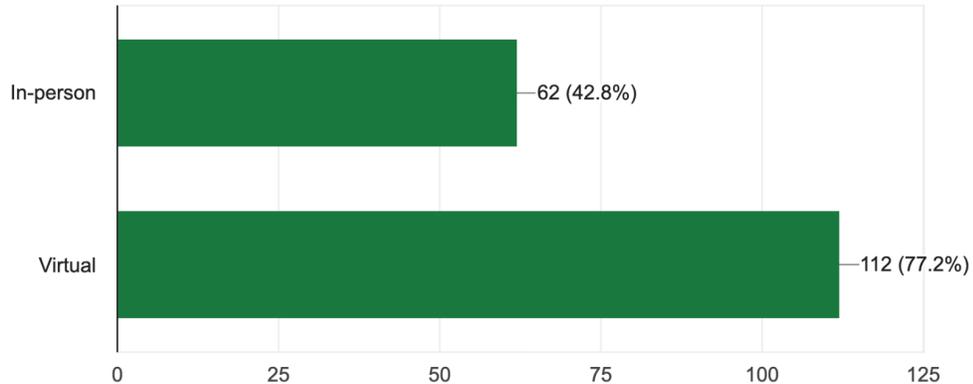
149 responses





Which type of meeting would you prefer to attend? (Check all that apply.)

145 responses



Workshops and Conferences Carolina Achieve has Attended

- National Alliance for Public Charter Schools Annual Conference - June 2022
- North Carolina Association for Public Charter Schools Annual Conference - July 2022
- North Carolina Chamber of Commerce - Education & Workforce Conference - August 2022
- NewSchools Venture Fund Workshop - November 2022
- Mapping the Movement - February and May 2023
- North Carolina Coalition for Charter Schools Summit - February 2023
- NCDPI and America Succeeds Workshop - March 2023

Preschool and Childcare Center Visits

- Center for Excellence Child Care and Academy
- Knee High Preschool
- Primary Colors Childcare Center
- Sounds and Colors (2 locations)
- South Square KinderCare
- Tiny Tots Too (2 locations)



Guiding Conversations

Government Officials:

- Former Senator Howard Lee
- State Representative Renee Price
- Councilmember Leonardo Williams

NCDPI:

- Andrew Smith - Assistant State Superintendent

University Professors and Staff:

- Aria Chernik - Duke University
- Jonathan Collins - Durham Tech
- Tamette Farrington - North Carolina Central University
- Jane Fruehwirth - University of North Carolina
- Roderick Heath - Fayetteville University
- Kevin Hoch - Duke University
- Steve Mclelland - Duke University
- Quintin Murphy - North Carolina Central University
- Jim Ruth - Duke University
- Mark Townley - North Carolina State University

Local Business Community:

- Lisa Gordon Stella - NCAPCS lawyer
- George Lucaci - Folio Beyond
- Ari Medoff - Arosa
- Gurav Patel - Local real estate developer
- Tim Scales - American Underground

School Leaders:

- Tim Castanza - Executive Director - Bridge Preparatory Charter School
- Susan Haws - Executive Director - Insight Co-Learning
- Mary Moss - Executive Director - Charlotte Lab School
- Alex Quigley - Executive Director - Durham Charter School
- Toni Shellady - Executive Director - Discovery Charter School
- Joseph Webb - Executive Director - West Triangle High School



Community Organizations:

- Joseph Abledinger - SparkNC
- Destiny Alexander - POOF
- Beth Anderson - Hill Learning Center
- Valerie Anderson - Education Director - Emily K Center
- Jes Avert - The Reinvention Lab
- Lourdes Carbajal - El Centro Hispano
- Steve Chalmers - Hayti Reborn and OneTEN
- Sarah Chick - RTP Foundation
- Scott Czechlewski - CEO Hillsborough/Orange County Chamber of Commerce
- Rhonda Dillingham - NC Association of Public Charter Schools
- Jacob Dolan - Consultant
- Sonia Frischmeier - Carolina Farm Stewardship
- Robert Fruehwirth - Pastor - St. Matthews Church - Hillsborough
- Dan Gonzales - Founder District C
- Magan Gonzales-Smith - DPS Foundation
- Lee Gray - Knox Street Studios/Forward Cities
- Brianna Green - NCBCE
- Anne Jones - Founder District C
- Angela Lee - Director - Hayti Heritage Center
- Lindalyn Kakadelis - North Carolina Coalition for Public Charter Schools
- Hanif Omar - Piedmont Business
- Ben Pendarvis - Open Way Learning
- Nastacia Pereira - Forward Cities
- Anne Phillips - Policy Transportation - City of Durham
- Derek Rhodes - Durham Success Summit
- Pilar Rocha-Goldberg - El Centro Hispano
- Mya Shanka McMillan - Purpose Learning Labs
- Soteria Shepperson - Present Day of Main
- Casey Steinbacher - Made in Durham
- Jessica Swenicki - myFutureNC
- Raymond Trapp - RTP Foundation
- Ciera Tucker - NCBCE
- Christina Villegas - Director of Game Plan College - Emily K Center
- Julie Wells - LCC
- Kate Wiggins - NCIDEA
- Mel Wright - The Wright Village



Alamance Community School

195 Kronbergs Court
Haw River, NC 27258

April 13, 2023

To Whom It May Concern:

I have had the pleasure of meeting with Tiffany Alrefae, Founding Head of School at Carolina Achieve, multiple times and have agreed to be her mentor and support Carolina Achieve Charter School in Orange County, NC.

Having had the experience of starting two charter schools, Voyager Academy in Durham, NC and Alamance Community School in Haw River, NC, I know firsthand how hard it is to open a school. I believe that we, charter schools and charter school leaders, should work together and we all improve when we support each other.

I am committed to helping Tiffany and Carolina Achieve in any way possible, including, but not limited to charter application assistance, academic program and curriculum development, operations guidance, and onsite visits. I am confident that Orange County will benefit from an additional school choice. Please feel free to contact me if you have any questions.

Best,

Leslie Hall Paynter, M.Ed.

Managing Director

Alamance Community School

To: Charter School Advisory Board and Office of Charter School

Delivery via electronic submission

April 20, 2023

To the Charter School Advisory Board and Office of Charter Schools,

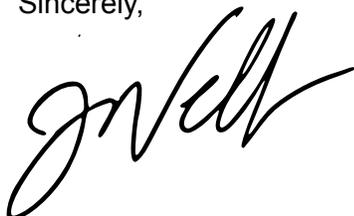
I am writing to confirm a mentorship relationship between the boards and staff of West Triangle High School and Carolina Achieve. We look forward to working closely with them to share our expertise and knowledge of best practices in governance and strategic planning. This will be a valuable opportunity for our organizations to learn from each other and grow together.

We are excited to collaborate with Carolina Achieve to provide students with the best educational experience. With that being the case we have agreed to an articulation agreement with rising 9th graders from Achieve. This will ensure students have a seamless transition from middle to high school.

Further, West Triangle High School has agreed to rent space to Carolina Achieve for 2-3 years should adequate space be available. This mutually beneficial arrangement will allow both institutions to work together in the same community. We are excited to embark on these new partnerships and look forward to working together.

Questions regarding the relationship can be addressed to Joseph Webb, Founder and Executive Director of WTHS, at josephbwebb@gmail.com

Sincerely,

A handwritten signature in black ink, appearing to read 'jwebb', written in a cursive style.



Dear NC Charter School Advisory Board,

I am writing to express District C's strong support for the new K-8 charter school, Carolina Achieve. As co-founder of District C, an organization that works closely to connect students from all types of schools around NC with businesses and organizations through meaningful educational collaborations, I believe that Carolina Achieve has the potential to provide a unique and high-quality educational experience to students in North Carolina.

I am particularly impressed with Tiffany Alrefae's leadership and vision for the school, as well as the school's commitment to serving a diverse student population. We believe that this approach aligns closely with our own mission to support educational equity and excellence for all students.

As an organization with expertise in educational innovation and entrepreneurship, we are eager to support Carolina Achieve in any way we can. In particular, we believe that our experience in designing and launching innovative educational programs can be of significant value to the school as it seeks to establish itself in the community.

Furthermore, we believe that there is a great opportunity to connect the school with the greater Triangle business community as they seek to incorporate our Teamship program into their curriculum. We have strong relationships with local businesses and organizations, and we believe that we can help Carolina Achieve forge meaningful partnerships with these entities. These partnerships could take many forms, including mentorship programs, internship opportunities for students, and collaborations on curriculum design. We understand that the school is committed to building a strong culture of collaboration and teamwork among its students and faculty. Our team of experienced professionals can offer guidance on effective team-building strategies and best practices.

We believe that our collaboration with Carolina Achieve will benefit not only the students at the school but also the broader educational community in North Carolina. We are committed to working closely with Tiffany Alrefae and the school's leadership team to ensure the success of this innovative new charter school.

Thank you for your consideration, and we look forward to the opportunity to work with Carolina Achieve.

Sincerely,

A handwritten signature in black ink, appearing to read "Anne Jones".

Anne Jones
Co-Founder, District C

April 25, 2023

Dear NC State Board of Education and Charter School Advisory Board,

I am thrilled about Carolina Achieve's interest in exploring a partnership with the Learning Innovation Network at Building 21. As the Executive Director of the Learning Innovation Network at Building 21, I have had the pleasure of working with a variety of schools and organizations that prioritize personalized learning experiences for students. Based on my experience and knowledge, I believe that a partnership between Building 21 and Carolina Achieve has the potential to create a transformative educational experience for students in North Carolina.

At Building 21, we are committed to advancing learner-centered education and competency-based frameworks, and we see that same dedication in Carolina Achieve's proposed approach. As such, we would like to explore ways in which we can work together to support the development and implementation of competency-based frameworks, professional development, and leadership coaching.

Competency-based education is an approach that emphasizes the mastery of skills and knowledge over traditional measures of academic progress, such as grades or test scores. This approach encourages students to take ownership of their learning and progress at their own pace. It also requires students to apply their learning in meaningful ways. By implementing this model, Carolina Achieve is creating an environment that fosters critical thinking, problem-solving, and self-directed learning. At Building 21, we have built and implemented our competency-based framework and personalized learning model in our two lab schools, and we are excited to work with Carolina Achieve to implement their learner-centered, competency-based vision.

Professional development and leadership coaching are crucial components of any successful educational endeavor, and we believe that our experience at Building 21 can provide valuable support to Carolina Achieve. We can offer guidance and support in the development of leadership structures, coaching, and ongoing professional development to ensure that their school is well-positioned to create a positive and effective learning environment for students. We can also support Carolina Achieve in tracking, monitoring, and communicating progress and growth across all of the competencies to all relevant stakeholders.

Through our partnership, we believe that we can make significant strides toward advancing learner-centered education and competency-based frameworks. I am confident that a partnership between Building 21 and Carolina Achieve will be a mutually beneficial endeavor that will have a positive impact on students, families, and the community.

Sincerely,

A handwritten signature in black ink, appearing to read 'Sandra Moumoutjis', with a long horizontal flourish extending to the right.

Sandra Moumoutjis
Executive Director, Learning Innovation Network
Building 21
sandra@b-21.org

TO: Charter School Advisory Board Members, State Board of Education
FR: Ashley Martin, Director of Exploring New Schools Model | New Leaders Organization
RE: Carolina Achieve Charter Application
Date: April 10th, 2023

To whom it may concern:

I am writing this letter in support of Tiffany Alrefae, Founding Head of School, as her mentor, and her school, Carolina Achieve, a proposed inclusive K-8 public tuition-free school in the West Triangle area that would serve students in Orange County, Chapel Hill, Durham, Eastern Alamance, Chatham County, and Wake County. Mrs. Alrefae is currently a fellow in the New Leaders' Exploring New School Models (ENSM) program and has demonstrated strong leadership skills and commitment to equity throughout the program.

During her time in ENSM fellowship, Mrs. Alrefae developed a strong community engagement plan that ensures Carolina Achieve's mission, vision, and model is in alignment with future students and families. Through conducting empathy interviews and shadowing experiences, the school's pillars were designed based on community values and honoring the diversity of all stakeholder groups.

Additionally, Mrs. Alrefae has spent significant time building her capacity to lead for instructional excellence and equity. The school model is based on rigorous standards-based instruction that will ensure all students are exposed to grade-level standards on a daily basis. This summer, the team at Carolina Achieve will launch a pilot of the school model with students in the area to gather data and feedback. They will use this information to iterate the model before the full launch in August 2024. This will ensure the school will have a successful design and launch and meet the needs of its student population.

It is my strong belief that Carolina Achieve if approved, will have a significant and positive impact on all students and families in the community. I have full confidence in Mrs. Alrefae's ability to lead this school to greatness. If you have any questions or would like to discuss my recommendation further, please do not hesitate to contact me.

Sincerely,



Ashley Martin

amartin@newleaders.org



April 21, 2023

Members of the Charter School Advisory Board and NC Department of Education,

I am writing to express my enthusiastic support for Carolina Achieve, the proposed new inclusive K-8 learner-centered and competency-based charter school in Orange County. As the CEO of the Hillsborough/Orange County Chamber of Commerce, I am deeply committed to supporting initiatives that enhance the educational opportunities and economic vitality of our community. I believe that this new school will do both.

The mission of this school is truly inspiring. By focusing on the development of entrepreneurial skills, mindsets, and behaviors called the Habits of Success, the school will prepare all students to achieve their scholastic, personal, and professional goals. I believe that this approach to education is essential for the success of our future workforce and that this specific focus is not offered at any other school in our county.

As you know, the business community in our region is constantly seeking skilled, knowledgeable, and motivated employees. By providing students with the tools they need to succeed in the workforce, this school will help to meet this demand and boost economic growth in our area. The Habits of Success that students will learn at this school are precisely the qualities that employers are seeking in their employees.

Furthermore, by fostering an inclusive learning environment that celebrates diversity, this school will prepare students to thrive in a global economy. The ability to work effectively with people from different backgrounds and cultures is increasingly important in the modern workforce, and this school will give students a head start in developing these critical skills.

In conclusion, I urge you to support Carolina Achieve, the proposed inclusive K-8 learner-centered and competency-based charter school in Orange County. I believe that this school has the potential to make a significant positive impact on our community by preparing our students for success in the workforce and boosting economic growth in the region. Thank you for your consideration.

Sincerely,

Scott Czechlewski
CEO, Hillsborough/Orange County Chamber of Commerce

TO: Charter School Advisory Board Members, State Board of Education
FR: Laura Boyd Smidt, INCubatoredu Program Specialist
RE: Carolina Achieve Charter Application
Date: March 29, 2023

To Whom It May Concern,

I was excited to learn of the possibility of a new K-8 public tuition-free school in the West Triangle area that will serve students in Orange County, Chapel Hill, Durham, Eastern Alamance, Chatham County, and Wake County. After speaking with Tiffany Alrefae, the Founding Head of School about the vision for the school, I believe that students and their families from the West Triangle Area would see this school as an excellent additional option for K-8th grade.

Tiffany and I have met numerous times during the past year to discuss the mission and vision of Carolina Achieve and how it aligns with the characteristics of an Uncharted Learner. Nurturing skills such as creative problem solving, critical thinking and speaking with a purpose prepares students to fail forward, learn and be resilient. In over 250 schools across the nation, we have seen this belief become a reality. With experiential project based learning, students thrive.

Carolina Achieve students will explore entrepreneurial concepts such as opportunity recognition, design thinking, and empathy as they progress through their K-8 education. With these skills, they will be better prepared for any career path and for our ever changing world of work.

Uncharted Learning, a not for profit organization, enthusiastically supports the charter school application of Carolina Achieve. I can confidently say that, if approved, Carolina will have a significant and positive impact on the students in the community and the community as a whole.

Sincerely,

Laura Boyd Smidt

Laura Boyd Smidt
Uncharted Learning, NFP
INCubatoredu Program Specialist



“Connecting Students to Literacy”

April 26, 2023

To whom it may concern:

I am pleased to inform you that I have agreed to mentor Tiffany Alrefae, Founding Head of School at Carolina Achieve in opening and running her new K-8 charter school. As the Director of Operations at Bridge Preparatory Charter School, the first public school in New York State designed specifically for students with dyslexia and other language based needs, I am excited about the opportunity to work with her and her team to provide guidance in the areas of special education.

I recognize that special education is a crucial aspect of any school, and I am committed to sharing my expertise in this field. I have been a special educator for fifteen years, serving in the classroom and a variety of administrative roles, always working to drive the quality of instruction and school design forward for all students, but specifically those with the highest needs. My experienced team has successfully implemented various programs to meet the needs of students with disabilities at our school in NYC. We understand the challenges that come with providing quality education to students with special needs, and we are eager to share our knowledge and experience with Ms. Alrefae.

My goal is to help her create a high-quality education program that meets the unique needs of her students with disabilities. I look forward to working with Tiffany and the Carolina Achieve team in the coming months. Please feel free to contact me if you have any questions or concerns.

Educationally yours,

A handwritten signature in blue ink, appearing to read "Faron Ebanks", written in a cursive style.

Faron Ebanks



Carolina Achieve

Feasibility Assessment

Overview

Carolina Achieve intends to be a *high-performing, innovative school of choice for elementary and middle school-aged students residing in Orange and Durham Counties, and surrounding communities.

Students will flourish in an academically rigorous setting and will learn about the characteristics of successful entrepreneurship. Carolina Achieve's focus on ***Habits of Success*** -- the skills, mindsets and behaviors that help students achieve their full potential -- will serve as a clear differentiator in our service area.

Equally important are significant competitive circumstances that are present in the vicinity of our proposed location at the intersection of Lawrence Road and US Highway 70 in Hillsborough.

They include:

- Projected population growth in the region, particularly among school-aged children.
- Ease of access to the school's campus for families from a variety of communities.
- The relative lack of high-performing public alternatives in close proximity to Carolina Achieve.
- The appeal of the school's commitment to providing access, resource and support to nearby underserved students.

*High-performing school means a school that receives an A or B grade by the NC State Report Card while a Low-performing school receives a C, D, or F grade

Cumulative Population Growth, 2020-2030

Population growth in the primary Carolina Achievement service area is projected to be steady and significant for the foreseeable future. A cumulative increase between 2020 and 2030 of over 50,000 people is accomplished through the combined dynamics of migration to the region and organic growth.

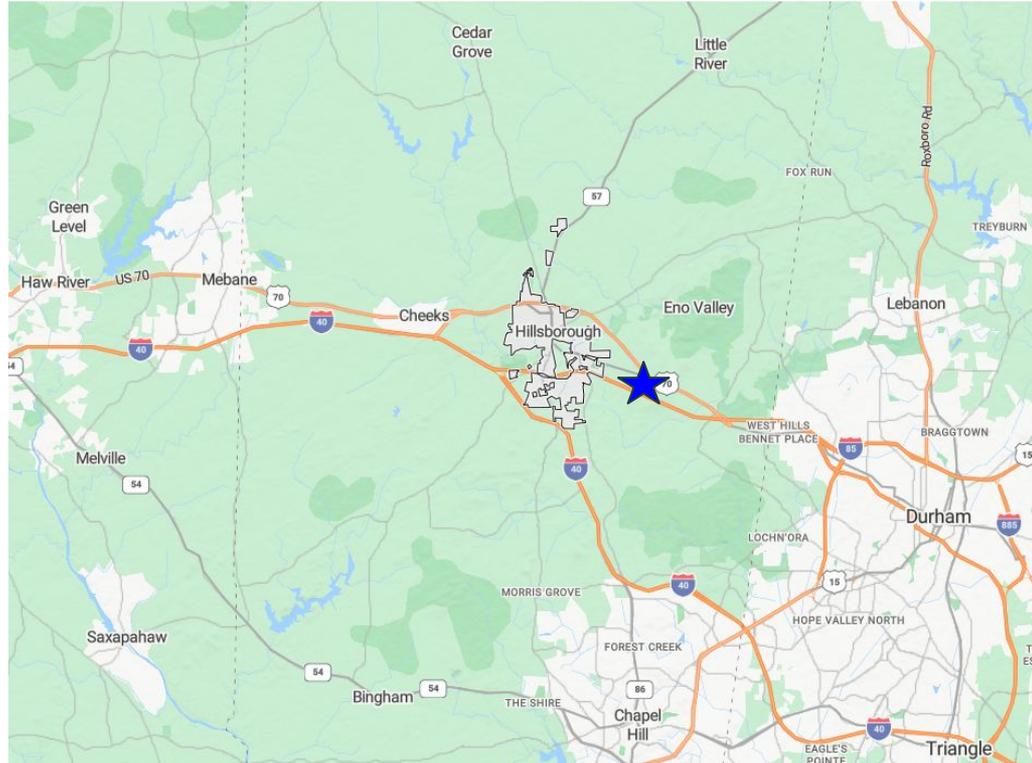
County	July 1, 2020 Population Estimate	July 1, 2030 Population Estimate	Numeric Change	Percent Increase	Net Migration	Natural Increase
Durham	325,573	369,536	43,963	13.5%	26,049	17,914
Orange	148,911	161,272	12,361	8.3%	11,210	1,151

Population Growth Ages 5-14, 2021-2026

County	Age Group	Population Growth Estimate
Durham	5-14	428 students
Orange	5-14	199 students

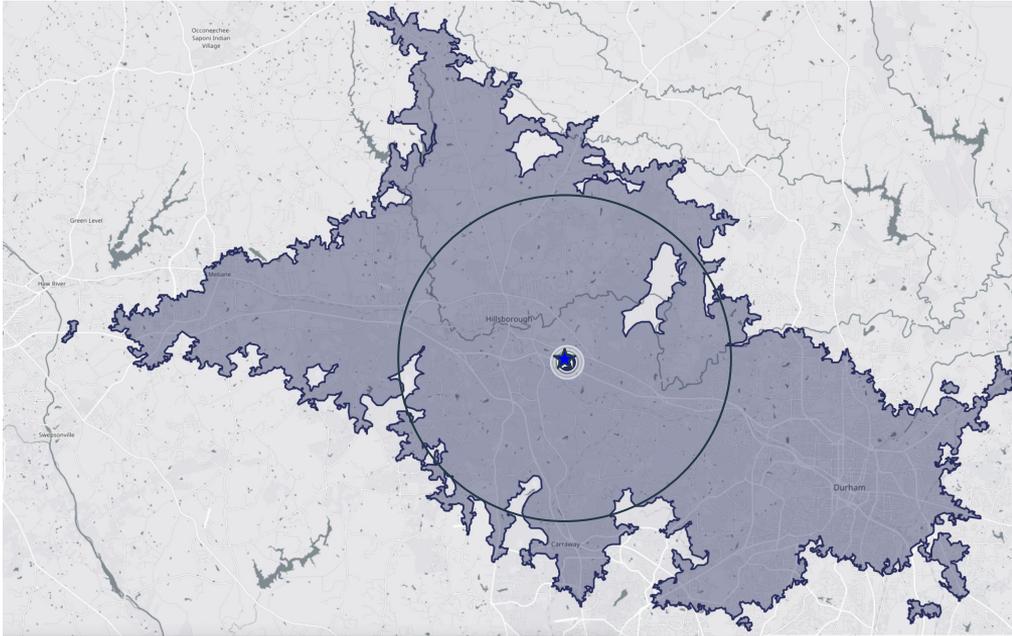
- The total enrollment of all elementary and middle schools within 10 miles of Carolina Achieve's proposed site is 21,760 students.
- The total population of students ages 5-14 in Chapel Hill/Carrboro, Durham, and Orange Counties in the 2021-22 school year totals 52,284 and is projected to grow by 1.2% in the next 5 years.
- In the time frame from 2021 to 2026, student population in the Carolina Achieve demographic is projected to increase by over 600 students in the school's primary service area.

Ease of Access to Carolina Achieve



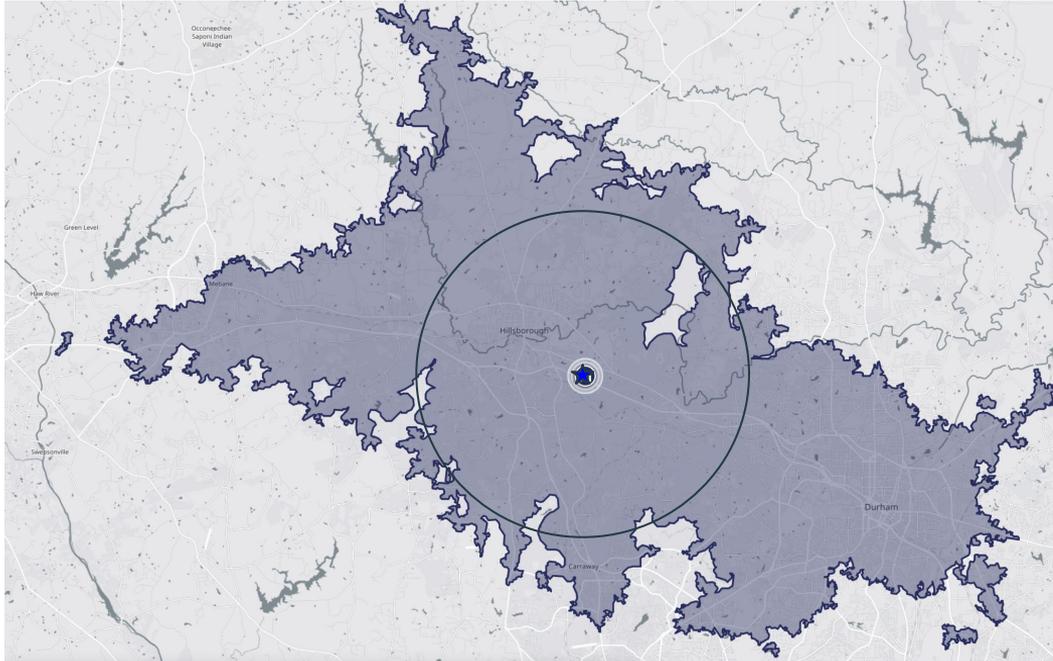
- The proposed location of Carolina Achieve is conveniently located, with close proximity to several well-traveled highways and local thoroughfares.
- Families can utilize I-85, I-40, US Highway 70, Business US Highway 70, NC Highways 86 and 57 to access the school in a short amount of time.

30 Minute Morning Drive Time Radius



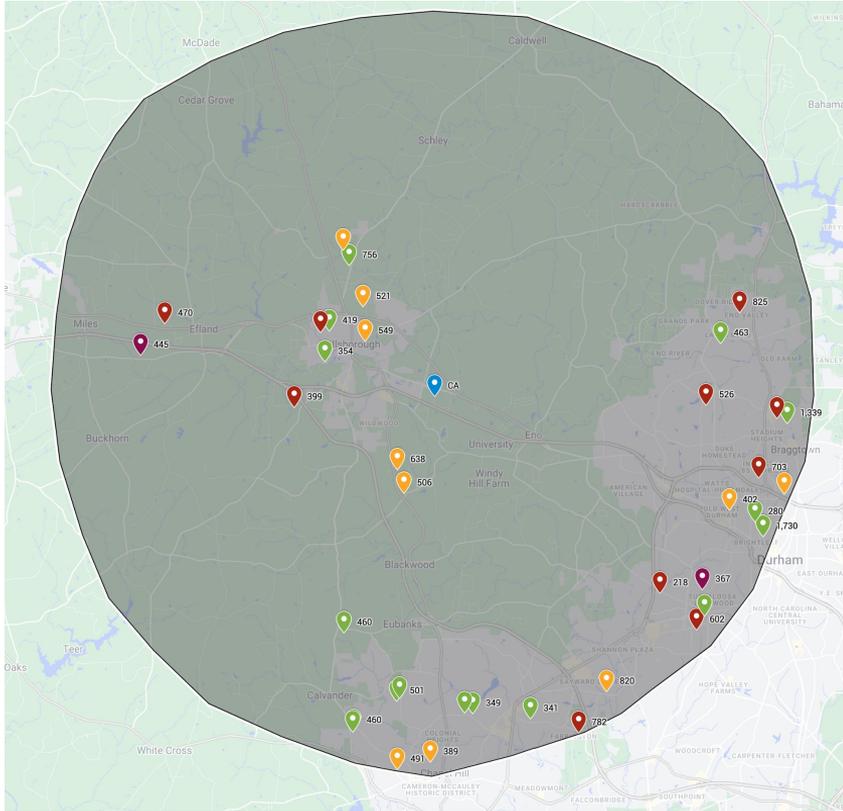
- The shaded area indicates a 30-minute drive time radius to the prospective site at 8:30 AM on a typical Monday.
- Primary commute patterns affecting nearby metropolitan areas such as Durham, Chapel Hill and Research Triangle Park during morning or afternoon (next slide) will have minimal impact on access to Carolina Achieve.

30 Minute Afternoon Drive Time Radius



- The purple area indicates a 30-minute drive time radius from the school at 4:00 PM on a typical Monday.

Size & Quality of Elementary & Middle Schools within 10 miles

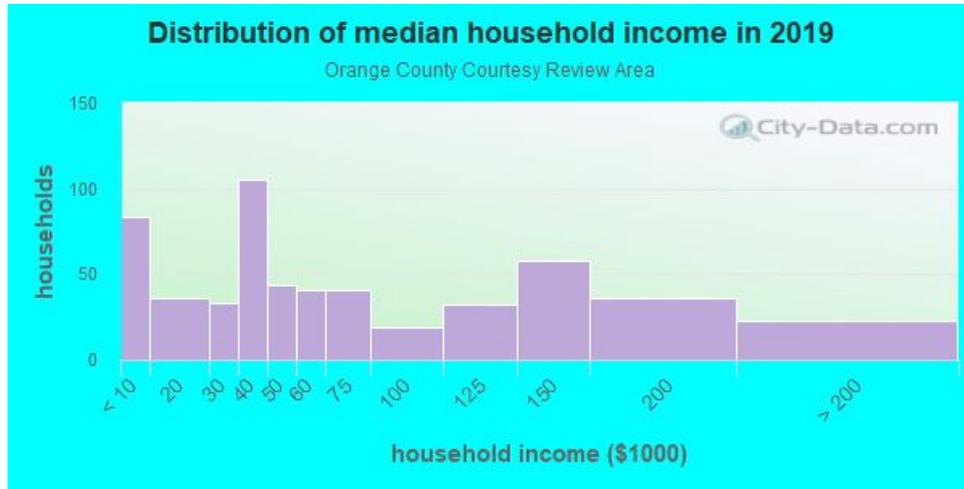


- | | |
|-----|-------|
| CA | 668 |
| 638 | 460 |
| 506 | 751 |
| 521 | 389 |
| 354 | 714 |
| 549 | 602 |
| 419 | 1,730 |
| 399 | 218 |
| 756 | 782 |
| 309 | 820 |
| 470 | 367 |
| 290 | 280 |
| 445 | 402 |
| 460 | 703 |
| 491 | 389 |
| 501 | 1,339 |
| 341 | 899 |
| 349 | 526 |
| 349 | 463 |
| | 825 |
| | 635 |



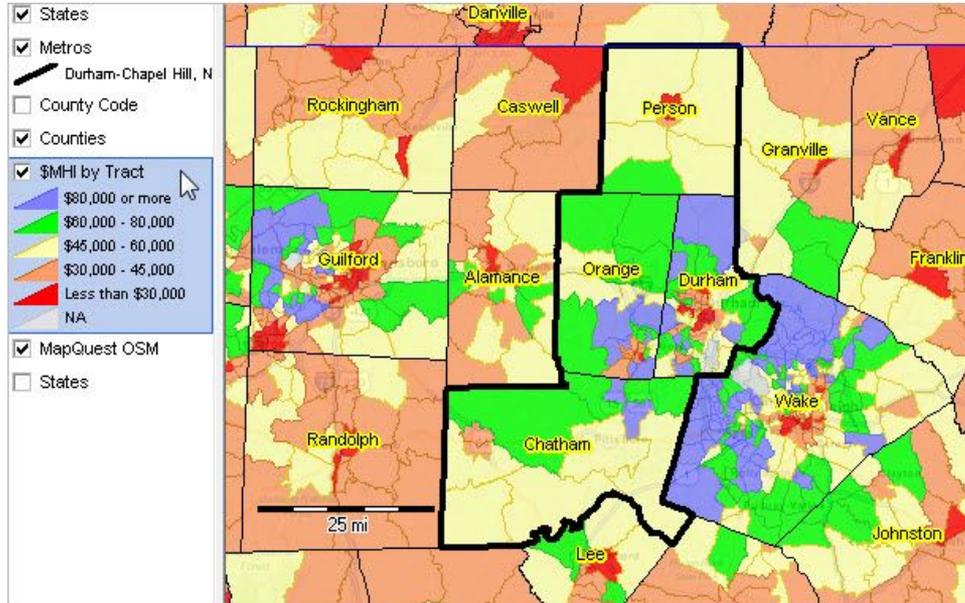
Traditional Elementary & Middle Schools (See appendix for Full List of Names with Ratings)

Access For Low Income Households



- The vision of Carolina Achieve that includes a commitment to underserved students will resonate strongly with families in close proximity to the school.
- A significant percentage of households in Orange County have an annual income below \$50,000.
- Carolina Achieve will provide access to low income families that is presently difficult to attain.

Access For Low Income Households

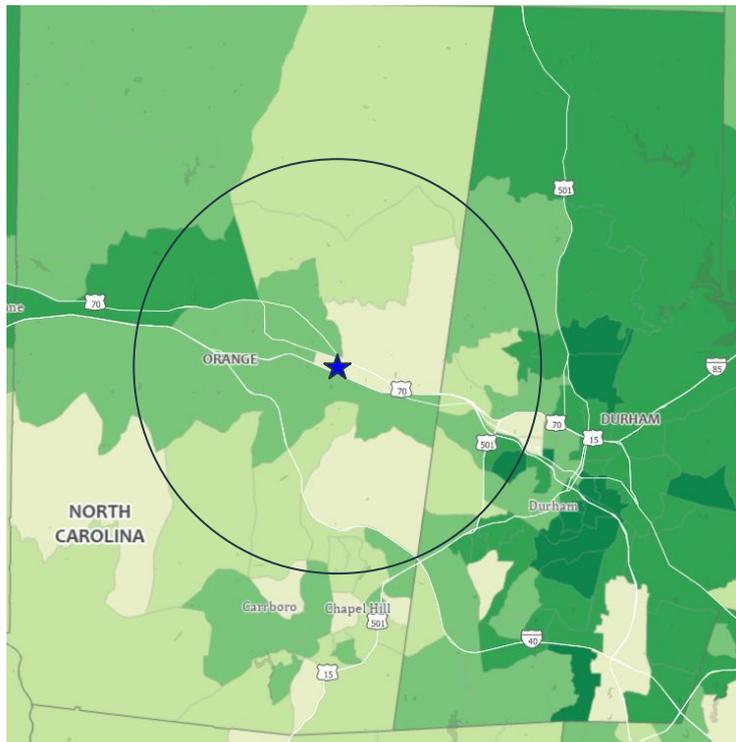


- There are only 3 moderately *high performing schools near the Carolina Achieve location.
- No high quality schools exist in the area north and east of Carolina Achieve.
- The areas in the northern half of Orange County and western Durham County include a lower percentage of high income households.
- Carolina Achieve's close proximity, ease of access and vision will make the school an ideal choice for these lower income families.

*High-performing school means a school that receives an A or B grade by the NC State Report Card while a Low-performing school receives a C, D, or F grade

African-American Population Metrics

- Several census tracts near Carolina Achieve have Black population percentages of 10% or greater.



This map shows the percentage of the total population that reported their race as Black or African American alone in the 2020 Census at the state, county, and census tract levels. Zoom in to see county- and tract-level data. Click on the map to learn more.

Legend

State (or state equivalent) boundary



County (or county equivalent) boundary



Minor civil division boundary



Census tract boundary



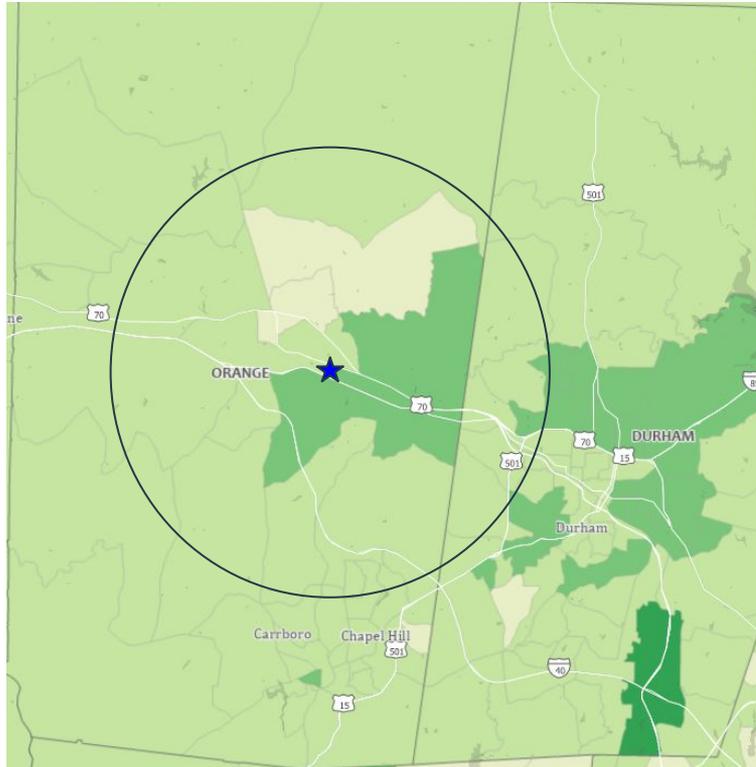
Percent Black or African American alone by census tract

- 50.0 or more
- 25.0 to 49.9
- 10.0 to 24.9
- 5.0 to 9.9
- Less than 5.0
- No population

U.S. percent = 12.4

Hispanic Population Metrics

- Many of the census tracts with the highest percentage of Hispanics are within a short drive of CA.



This map shows the percentage of the total population that reported their ethnicity as Hispanic or Latino from the 2020 Census at the state, county, and census tract levels. Zoom in to see county- and tract-level data. Click on the map to learn more.

Legend

State (or state equivalent) boundary

County (or county equivalent) boundary

Minor civil division boundary

Census tract boundary

Percent Hispanic or Latino by census tract

70.0 or more

50.0 to 69.9

20.0 to 49.9

5.0 to 19.9

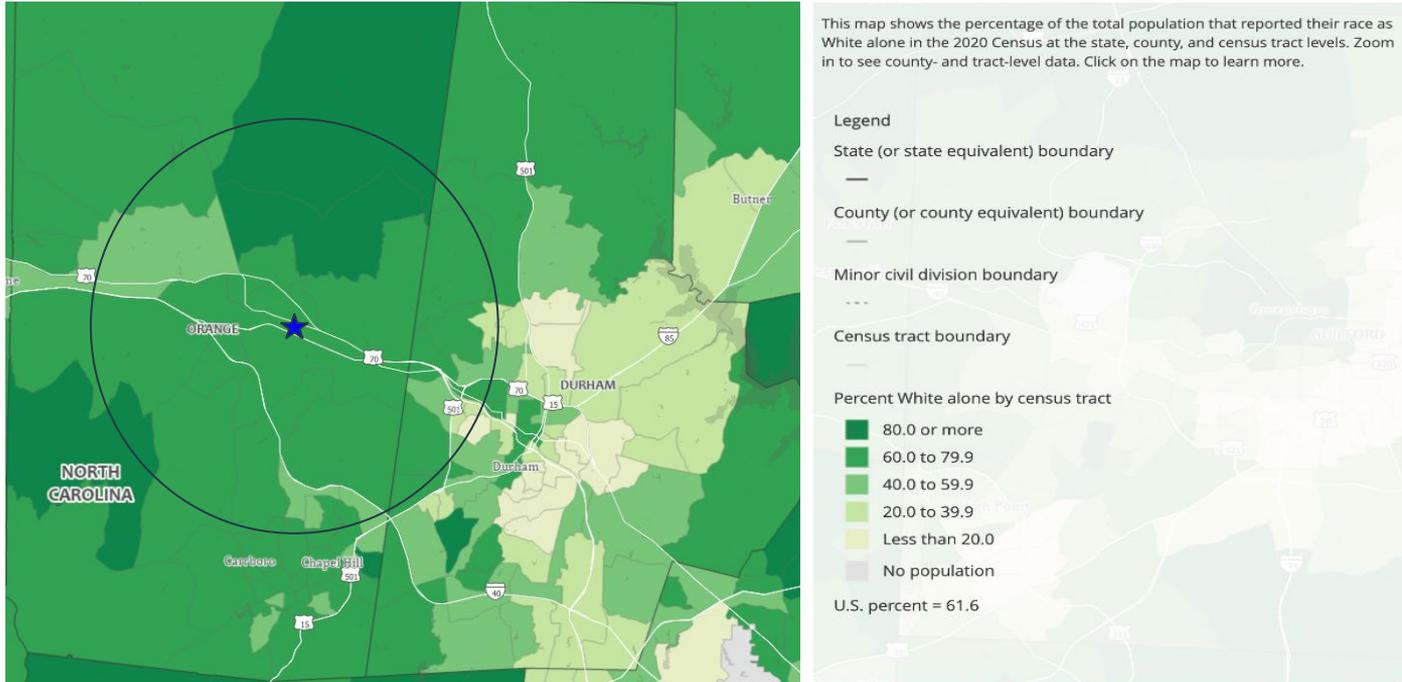
Less than 5.0

No population

U.S. percent = 18.7

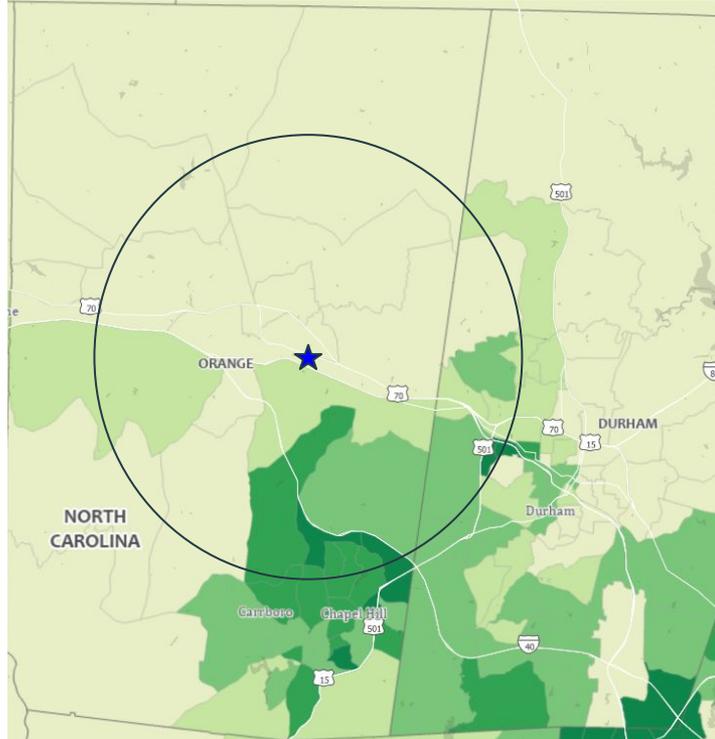
White Population Metrics

- Rural, predominantly white households also lack access to high performing schools in less densely populated portions of Orange and northern Durham County.



Asian Population Metrics

- Asian families are less likely to live in areas with greater poverty rates and are more likely to have medium-quality elementary and middle school options near them.



This map shows the percentage of the total population that reported their race as Asian alone in the 2020 Census at the state, county, and census tract levels. Zoom in to see county- and tract-level data. Click on the map to learn more.

Legend

State (or state equivalent) boundary



County (or county equivalent) boundary



Minor civil division boundary



Census tract boundary



Percent Asian alone by census tract

20.0 or more

10.0 to 19.9

5.0 to 9.9

2.5 to 4.9

Less than 2.5

No population

U.S. percent = 6.0

Citations

Slide 3 -

<https://www.osbm.nc.gov/facts-figures/population-demographics/state-demographer/countystate-population-projections/population-growth-2020-2030>

Slide 4 - <https://datacenter.aecf.org/data/tables/6169-children-by-age-group?loc=35&loct=5#detailed/5/4910-5009/false/574/137/12869>

Slide 6 - <https://www.google.com/maps/>

Slides 7 & 8 - <https://app.traveltime.com/>

Slide 9 & 11 - <https://ncreports.ondemand.sas.com>

Slide 12 - <https://www.city-data.com/>

Slide 13 - [Durham-Chapel Hill, NC MSA Situation & Outlook Report \(proximityone.com\)](#)

Slides 14, 15, 16, 17 - <https://mtgis-portal.geo.census.gov/arcgis/apps/MapSeries/index.html>

Appendix A1: Acceleration Evidences

Carolina Achieve





March 10, 2023

Ms. Ashley Baquero
Director
Office of Charter Schools
6307 Mail Service Center
Raleigh, NC 27699-6307

Re: Carolina Achieve

Dear Ms. Baquero and Members of the Charter School Advisory Board,

I'm writing a letter for support for Carolina Achieve. Hubrich Contracting, Inc. and Carolina Achieve have been discussing a partnership for development and construction of a new charter school. Hubrich Contracting, Inc. would be the developer/contractor for the new charter school located in Orange County, North Carolina and will provide financial support for design, programming, project management and construction. Hubrich Contracting, Inc. has successfully completed 33 projects in North Carolina and South Carolina. We began discussions in December 2022, and Hubrich Contracting, Inc. and Carolina Achieve have been discussing and reviewing finance structures a potential site for the development of this new charter school. Given all the complexities with zoning, traffic, and land availability, Hubrich has been engaged and visited numerous sites in Durham County and Orange, NC. Hubrich offered insight as to positives and negatives of the different sites to help provide guidance and are in the process of securing the land between Hillsborough and Durham in Orange County. We have been reviewing potential project budgets and the project is realistic given other charter school projects we have been involved with in the past.

Please do not hesitate to call me if you have any further questions. 919-697-5571

Sincerely,

A handwritten signature in blue ink, appearing to read "Steve Hubrich", with a long horizontal flourish extending to the right.

Steve Hubrich
President
Hubrich Contracting, Inc.



TENNIS COURTS

TENNIS CENTER

SKATE PARK

ENTRANCE FROM US 70A

BASEBALL FIELDS

ENTRANCE FROM LAWRENCE ROAD

LAWRENCE ROAD

SCHOOL PLAYING FIELDS

HIGH SCHOOL

K-8 SCHOOL

WALKING PATHS

1-85 CORRIDOR



0' 50' 100' 200'

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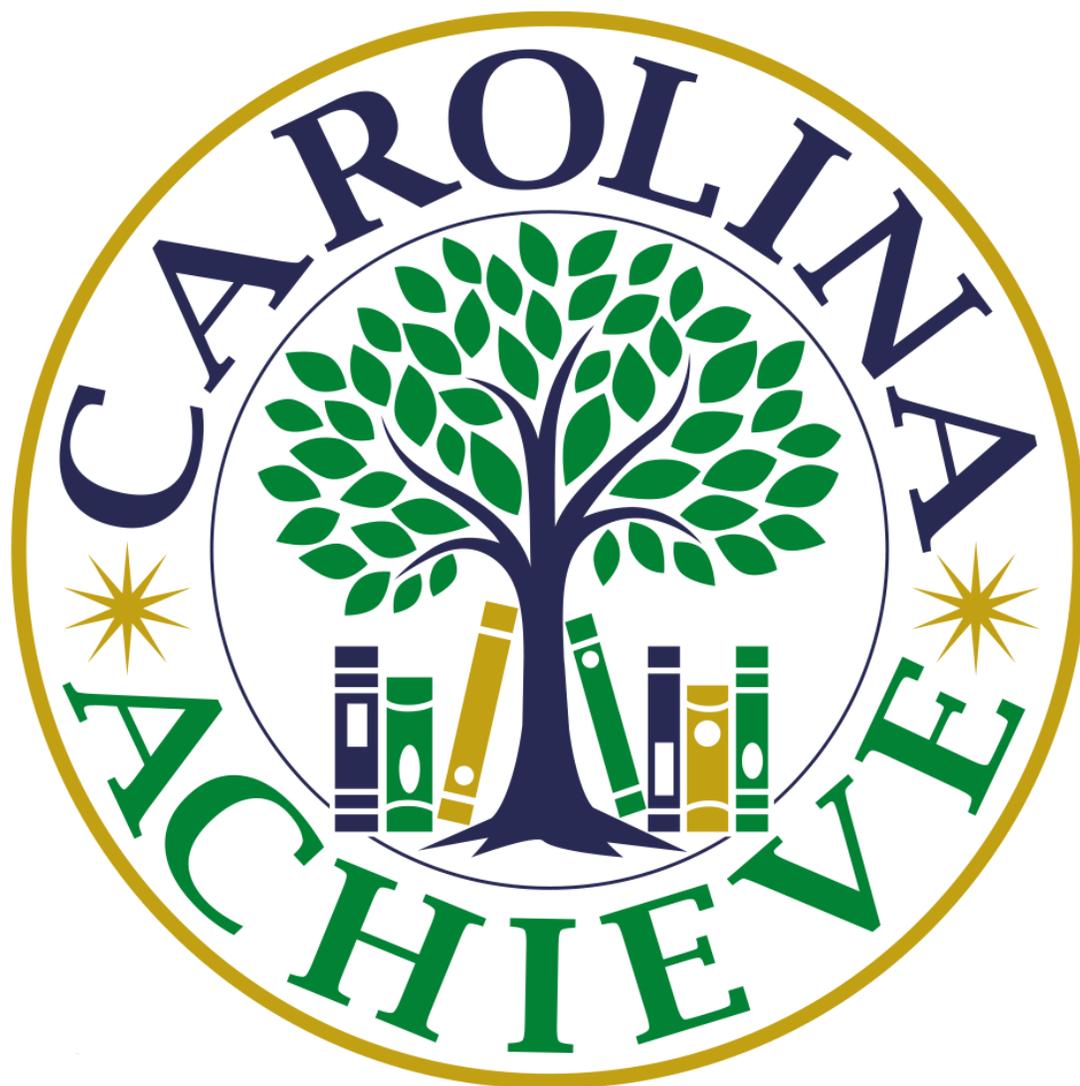
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DRAWING ALTERATION

IT IS A VIOLATION OF LAW FOR ANY PERSON, UNLESS ACTING UNDER THE DIRECTION OF LICENSED ARCHITECT, PROFESSIONAL ENGINEER, LANDSCAPE ARCHITECT, OR LAND SURVEYOR TO ALTER ANY FEES ON THIS DOCUMENT IN ANY WAY. ANY LICENSEE WHO ALTERS THIS DOCUMENT IS REQUIRED BY LAW TO AFFIX HIS OR HER SEAL AND THE NOTATION "ALTERED BY" FOLLOWED BY HIS OR HER SIGNATURE AND SPECIFIC DESCRIPTION OF THE ALTERATIONS.

Appendix B: Curriculum Outline for Each Grade Band the
School Will Ultimately Serve

Carolina Achieve



Carolina Achieve K - 8 Curriculum Examples

Carolina Achieve teachers will develop a strong academic foundation with a school-specific curriculum, instruction, and assessments. This curriculum builds on guidance from the following schools, Alamance Community School, Bridge Prep Charter School, and Building 21, as well as resources that are backed with verified reviews from the national leader in instructional materials, Edreports, and from industry leaders. The school will conduct curriculum reviews on a regular basis to ensure effectiveness and relevance. School leadership and the teachers will utilize the Data Wise School Improvement Process to review data from internal and external summative and formative assessments to guide teaching and learning.

This document includes a sample curriculum map for English Language Arts, Building 21's Student Competencies and Continua Framework, and Uncharted Learning's entrepreneurial curriculum and professional development for Entrepreneurship Across the Curriculum (EAC).

Example: English Language Arts K-8

The curriculum map below follows Amplify's Core Knowledge Language Arts (CKLA) program. The school will be using resources from Amplify CKLA to ensure that the curriculum, instruction, and assessments are directly aligned with the North Carolina Course of Study and the Science of Reading.

From the Amplify website: "Amplify CKLA is a unique core curriculum for grades PreK–5 ELA that's grounded in the Science of Reading and combines rich, diverse content knowledge in history, science, literature, and the arts with systematic research-based foundational skills instruction. Our intentional approach to background knowledge invites students to dig deeper and make connections across content areas. Amplify CKLA enables students to build a robust knowledge base for accessing and unpacking complex texts so real comprehension can happen. Amplify CKLA has been recognized by the Knowledge Matters Campaign as a literacy program that excels in building knowledge. Programs were selected for their rigor and the quality of their instructional and learning materials. EdReports, an independent curriculum review nonprofit, rates a curriculum on three gateways: Text Quality, Building Knowledge, and Usability. Amplify CKLA earned a green rating in all three. The premier High-Quality Instructional Material (HQIM) offering for elementary language arts, Amplify CKLA was developed in partnership with the Core Knowledge Foundation. It helps students develop both deep content knowledge and foundational skills."

Example: Building 21 Student Competencies and Continua

Carolina Achieve will be using Building 21's Student Competencies and Continua Framework as a foundation for its competency-based learning program. The competencies align with the North Carolina Course of Study and Amplify's CKLA. The use of the competency framework will both ensure that students are both acquiring knowledge and measure their ability to use it.

Example: Uncharted Learning Entrepreneurial Curriculum and Entrepreneurship Across the Curriculum (EAC)

Carolina Achieve will use resources and curriculum from Uncharted Learning, a nationally recognized nonprofit and leader in entrepreneurial education. The examples below include courses for fourth - eighth grade that will be integrated into the academic program, as well as the outline of professional development that teachers will receive to incorporate entrepreneurial ideas across all content areas.

English Language Arts: Sample K - 8 Curriculum Map

Strand	K	1	2	3	4
Knowledge	<ul style="list-style-type: none"> ● Nursery Rhymes and Fables ● The Five Senses ● Stories ● Plants ● Farms ● Native Americans ● Kings and Queens ● Seasons and Weather ● Columbus and Pilgrims ● Colonial Towns and Townspeople ● Taking Care of the Earth ● Presidents and American Symbols 	<ul style="list-style-type: none"> ● Fables and Stories ● The Human Body ● Different Lands, Similar Stories ● Early World Civilizations ● Early American Civilizations ● Astronomy ● The History of the Earth ● Animals and Habitats ● Fairy Tales ● A New Nation: American Independence ● Frontier Explorers 	<ul style="list-style-type: none"> ● Fairy Tales and Tall Tales ● Early Asian Civilizations ● The Ancient Greek Civilizations ● Greek Myths ● The War of 1812 ● Cycles in Nature ● Westward Expansion ● Insects ● The U.S. Civil War ● The Human Body ● Immigration ● Fighting for a Cause 	<ul style="list-style-type: none"> ● Classic Tales ● Animal Classification ● The Human Body: Systems and Senses ● The Ancient Roman Civilization ● Light and Sound ● The Viking Age ● Astronomy: Our Solar System and Beyond ● Native Americans: Regions and Cultures ● Early Explorations of North America ● Colonial America ● Ecology 	<ul style="list-style-type: none"> ● Personal Narratives ● Empires in the Middle Ages ● Poetry ● Eureka! Student Inventor ● Geology ● Contemporary Fiction ● American Revolution ● Treasure Island
Skills	<ul style="list-style-type: none"> ● Phonics and Reading ● Grammar/Language ● Spelling ● Writing 	<ul style="list-style-type: none"> ● Phonics and Reading ● Grammar/Language ● Spelling ● Writing 	<ul style="list-style-type: none"> ● Phonics and Reading ● Grammar/Language ● Spelling ● Writing 	<ul style="list-style-type: none"> ● Text Analysis/Comprehension ● Speaking and Listening ● Languages and Vocabulary ● Writing 	<ul style="list-style-type: none"> ● Text Analysis/Comprehension ● Speaking and Listening ● Languages and Vocabulary ● Writing

Strand	5	6	7	8
Knowledge	<ul style="list-style-type: none"> ● Personal Narratives ● Early American Civilizations ● Poetry ● Adventures of Don Quixote ● The Renaissance ● The Reformation ● A Midsummer Night's Dream ● Native Americans ● Chemical Matter 	<ul style="list-style-type: none"> ● Narrative - Moments ● Mysteries and Investigations ● Facts and Stories ● Man vs. gods in Ancient Greece ● Hero's Journey (Aztec mythology) ● Historical perspective (1910s) 	<ul style="list-style-type: none"> ● Narrative - Individual Experience ● Character and Conflict ● Brain Science ● Poetry ● Art ● California Gold Rush - 1849 - 1855 	<ul style="list-style-type: none"> ● Perspectives & Narrative ● Liberty and Equality ● Science and Science Fiction ● Shakespeare ● Holocaust ● Space Race - 1960s
Skills	<ul style="list-style-type: none"> ● Text Analysis/Comprehension ● Speaking and Listening ● Languages and Vocabulary ● Writing 	<ul style="list-style-type: none"> ● Reading <ul style="list-style-type: none"> ○ Literature ○ Informational ● Writing ● Speaking and Listening ● Language 	<ul style="list-style-type: none"> ● Reading <ul style="list-style-type: none"> ○ Literature ○ Informational ● Writing ● Speaking and Listening ● Language 	<ul style="list-style-type: none"> ● Reading <ul style="list-style-type: none"> ○ Literature ○ Informational ● Writing ● Speaking and Listening ● Language



building21 : All Competencies and Skills

Competency Framework

[ELA](#)
[HOS](#)
[HW](#)
[MATH](#)
[NGE](#)
[PD](#)
[PE](#)
[SCI](#)
[SS](#)
[VA](#)
[WF](#)
[WL](#)

Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals	Cross MyWays Connections	Portrait of a Graduate Alignment
Area	ELA	English Language Arts					
Competency	ELA.1	Read Critically	I can read and critique diverse texts (e.g., books, films, advertising, music, social media, news websites).				
Skill	ELA.1.1	Choose and apply reading strategies	How well can I apply reading strategies to make meaning of texts?	CCSS.ELA-LITERACY.CCRA.R.10 CCSS.ELA-LITERACY.CCRA.L.4 CCSS.ELA-LITERACY.RH.4	MFL.1 Building the academic core MFL.2 Critical readers.	CK.1 English Core	Content Knowledge
Skill	ELA.1.2	Evaluate the main ideas or themes	How well can I analyze the main idea or central theme?	CCSS.ELA-LITERACY.CCRA.R.1 CCSS.ELA-LITERACY.CCRA.R.2 CCSS.ELA-LITERACY.CCRA.R.3 CCSS.ELA-LITERACY.CCRA.R.8	MFL.1 Building the academic core MFL.2 Critical readers.	CK.1 English Core CK.4 Interdisciplinary and Global Knowledge	Content Knowledge
Skill	ELA.1.3	Analyze context, point of view, and purpose	How well do I account for the role of point of view and author's purpose in shaping the text?	CCSS.ELA-LITERACY.CCRA.R.6	MFL.1 Building the academic core MFL.2 Critical readers.	CK.1 English Core CKH.4 Information, Media, and Technology Skills	Content Knowledge
Skill	ELA.1.4	Analyze craft	How well can I evaluate the effectiveness of the techniques and tools the author uses?	CCSS.ELA-LITERACY.CCRA.R.4 CCSS.ELA-LITERACY.CCRA.R.5 CCSS.ELA-LITERACY.CCRA.R.7 CCSS.ELA-LITERACY.CCRA.L.5	MFL.1 Building the academic core MFL.2 Critical readers.	CK.1 English Core	Content Knowledge
Competency	ELA.2	Express Ideas	I can clearly and effectively express my ideas (in written and oral form) for particular purposes and audiences, using diverse formats and settings to inform, persuade, and connect with others.	CCSS.ELA-LITERACY.CCRA.W.10			
Skill	ELA.2.1	Identify a core message and audience	How well do I identify my core message and audience?	CCSS.ELA-LITERACY.CCRA.W.4	MFL.1 Building the academic core MFL.3 Compelling writers. OTUW.3 Creative thinkers—refram GCTP.3 Inquisitive world citizens v	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.2.2	Develop and organize the message	How well do I develop and organize my message?	CCSS.ELA-LITERACY.CCRA.W.4	MFL.1 Building the academic core MFL.3 Compelling writers. OTUW.1 Sense-makers—dealing v	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.2.3	Prepare the medium	How well do I make decisions about format and features that are best for my audience?	CCSS.ELA-LITERACY.CCRA.W.4 CCSS.ELA-LITERACY.CCRA.R.7 CCSS.ELA-LITERACY.SL.5	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.4 Information, Media, and Technology Skills	Communication, Content Knowledge
Skill	ELA.2.4	Finalize, practice and/or prepare	How well do I practice and prepare?	CCSS.ELA-LITERACY.CCRA.W.5 CCSS.ELA-LITERACY.CCRA.L.1 CCSS.ELA-LITERACY.CCRA.L.2	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.2.5	Engage, respond, and reflect	How well can I answer questions and reflect on both my process and final product?	Building 21 Original Content	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Competency	ELA.3	Compose Evidence-based Arguments	I can compose evidence-based arguments to support claims in an analysis of substantive topics or texts using valid reasoning and relevant and sufficient evidence.	CCSS.ELA-LITERACY.CCRA.W.1			
Skill	ELA.3.1	Introduce claims	How well do I introduce my claim?	CCSS.ELA-LITERACY.W.1.A	MFL.1 Building the academic core MFL.3 Compelling writers. OTUW.1 Sense-makers—dealing v	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.3.2	Use evidence to develop claims and counterclaims	How well do I develop my claim and counterclaims?	CCSS.ELA-LITERACY.W.1.B	MFL.1 Building the academic core MFL.3 Compelling writers. OTUW.1 Sense-makers—dealing v	CK.1 English Core CKH.3 Communication and Collaboration CKH.4 Information, Media, and Technology Skills	Communication, Content Knowledge
Skill	ELA.3.3	Use words and transitions to create cohesion	How well do I use transitions to connect my ideas?	CCSS.ELA-LITERACY.W.1.C	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.3.4	Use a formal style, objective tone, and advanced vocabulary	How well do I use vocabulary and maintain a formal style and objective tone?	CCSS.ELA-LITERACY.W.1.D CCSS.ELA-LITERACY.CCRA.L.1 CCSS.ELA-LITERACY.CCRA.L.2 CCSS.ELA-LITERACY.CCRA.L.6	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.3.5	Provide a compelling conclusion	How effectively do I conclude my argument?	CCSS.ELA-LITERACY.W.1.E	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.3.6	Strengthen writing through revision	How well do I strengthen my writing through a revision process?	CCSS.ELA-LITERACY.CCRA.W.5 CCSS.ELA-LITERACY.CCRA.L.1 CCSS.ELA-LITERACY.CCRA.L.2	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core HOS.4 Learning Strategies	Communication, Content Knowledge



Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Competency	ELA.4	Write Informative Texts	I can write informative texts to examine and convey complex ideas and information clearly and accurately through the effective selection, organization, and analysis of content.	CCSS.ELA-LITERACY.CCRA.W.2			
Skill	ELA.4.1	Introduce the topic	How well do I introduce my topic?	CCSS.ELA-LITERACY.W.2.A	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.4.2	Develop the main idea with key points	How well do I develop key points and evidence to support my main idea?	CCSS.ELA-LITERACY.W.2.B	MFL.1 Building the academic core MFL.3 Compelling writers. OTUW.1 Sense-makers—dealing v	CK.1 English Core CKH.3 Communication and Collaboration CKH.4 Information, Media, and Technology Skills	Communication, Content Knowledge
Skill	ELA.4.3	Use words and transitions to create cohesion	How well do I use words and transitions to create cohesion?	CCSS.ELA-LITERACY.W.2.C	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.4.4	Use a formal style, objective tone, and advanced vocabulary	How well do I use vocabulary and maintain a formal style and objective tone?	CCSS.ELA-LITERACY.W.2.D CCSS.ELA-LITERACY.W.2.E CCSS.ELA-LITERACY.CCRA.L.1 CCSS.ELA-LITERACY.CCRA.L.2 CCSS.ELA-LITERACY.CCRA.L.6	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration CKH.4 Information, Media, and Technology Skills	Communication, Content Knowledge
Skill	ELA.4.5	Provide a compelling conclusion	How effective is my conclusion?	CCSS.ELA-LITERACY.W.2.F	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.4.6	Strengthen writing through revision	How well do I strengthen my writing through a revision process?	CCSS.ELA-LITERACY.CCRA.W.5 CCSS.ELA-LITERACY.CCRA.L.1 CCSS.ELA-LITERACY.CCRA.L.2	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core HOS.4 Learning Strategies	Communication, Content Knowledge
Competency	ELA.5	Write Narrative Texts	I can write narratives to develop real or imagined experiences or events using effective technique, well-chosen details and well-structured event sequences.	CCSS.ELA-LITERACY.CCRA.W.3			
Skill	ELA.5.1	Engage and orient the reader in the opening	How well do I engage and orient my reader in my opening?	CCSS.ELA-LITERACY.W.3.A	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.2 Creativity and Entrepreneurship CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.5.2	Develop the story and characters	How well do I develop my story and characters?	CCSS.ELA-LITERACY.W.3.B CCSS.ELA-LITERACY.W.3.C	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.2 Creativity and Entrepreneurship CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.5.3	Use words and phrases, details, and sensory language	How well do I use words to "paint a picture" for my audience?	CCSS.ELA-LITERACY.W.3.D CCSS.ELA-LITERACY.CCRA.L.5	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.2 Creativity and Entrepreneurship CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.5.4	Use words and transitions to create cohesion	How well do I use words, phrases, and transitions to create cohesion?	CCSS.ELA-LITERACY.W.3.C	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.5.5	Provide a compelling conclusion	How well does my conclusion flow from the story?	CCSS.ELA-LITERACY.W.3.E	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.5.6	Strengthen writing through revision	How well do I strengthen my writing through a revision process?	CCSS.ELA-LITERACY.CCRA.W.5 CCSS.ELA-LITERACY.CCRA.L.1 CCSS.ELA-LITERACY.CCRA.L.2	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core HOS.4 Learning Strategies	Communication, Content Knowledge
Competency	ELA.6	Engage in Discussion	I can participate in collaborative discussions, listen critically, and respond appropriately individually or in a group setting.	CCSS.ELA-LITERACY.SL.1			
Skill	ELA.6.1	Demonstrate preparedness and responsibility	How well do I participate in the discussion?	CCSS.ELA-LITERACY.SL.1A CCSS.ELA-LITERACY.SL.1B	MFL.1 Building the academic core OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram GCTP:1 Self-aware team member GCTP:2 Essential co-creators—ber	CK.1 English Core CKH.3 Communication and Collaboration	Collaboration, Communication, Content Knowledge



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Competency Framework

ELA HOS HW MATH NGE PD PE SCI SS VA WF WL

Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Skill	ELA.6.2	Pose and respond to questions	How well do I pose and respond to questions?	CCSS.ELA-LITERACY.SL.1C	MFL.1 Building the academic core OTUW.2 Generative thinkers—crea GCTP:1 Self-aware team member GCTP:2 Essential co-creators—be	CK.1 English Core CKH.3 Communication and Collaboration	Collaboration, Communication, Content Knowledge
Skill	ELA.6.3	Reflect on new learning	How well can I reflect on the content of the discussion?	Building 21 Original Content	MFL.1 Building the academic core GCTP:1 Self-aware team member	CK.1 English Core CKH.3 Communication and Collaboration	Content Knowledge
Competency	ELA.7	Conduct Research	I can frame and advance an inquiry to investigate topics, build knowledge, and analyze and integrate information.				
Skill	ELA.7.1	Construct a research question	How well do I construct my primary question?	CCSS.ELA-LITERACY.CCRA.W.7	MFL.1 Building the academic core	CK.1 English Core	Content Knowledge
Skill	ELA.7.2	Identify and select credible, diverse sources to gather evidence	How well can I identify and select credible, diverse sources?	CCSS.ELA-LITERACY.CCRA.W.8	MFL.1 Building the academic core OTUW.1 Sense-makers—dealing v	CK.1 English Core CKH.4 Information, Media, and Technology Skills	Content Knowledge
Skill	ELA.7.3	Use systems to organize information gathered	How well do I organize information from my sources?	CCSS.ELA-LITERACY.CCRA.W.8	MFL.1 Building the academic core	CK.1 English Core CKH.4 Information, Media, and Technology Skills HOS.4 Learning Strategies	Content Knowledge
Skill	ELA.7.4	Synthesize multiple sources	How well can I evaluate and synthesize my findings?	CCSS.ELA-LITERACY.CCRA.W.9	MFL.1 Building the academic core MFL.3 Compelling writers. OTUW.2 Generative thinkers—crea	CK.1 English Core	Content Knowledge
Area	HOS	Habits of Success					
Competency	HOS.1	Manage My Work	I can demonstrate effective personal work habits to help me achieve my academic and personal goals.				
Skill	HOS.1.1	Manage tasks and deadlines	How well do I manage my tasks and deadlines?	Building 21 Original Content		HOS.1 Academic Behaviors	Conscientious
Skill	HOS.1.2	Set goals	How well do I set, achieve, and reflect on my goals?	Building 21 Original Content		WA.2 Identify Opportunities and Set Goals WA.5 Navigate Each Stage of the Journey HOS.4 Learning Strategies	
Skill	HOS.1.3	Organized and prepared	How well do I keep myself organized and come prepared to learn?	Building 21 Original Content		HOS.1 Academic Behaviors	Conscientious
Skill	HOS.1.4	Staying focused and on task	How well do I stay focused and on task?	Building 21 Original Content		HOS.1 Academic Behaviors HOS.2 Self-Direction and Perseverance	Conscientious
Skill	HOS.1.5	Improve my work	How well do I revise and improve my work?	Building 21 Original Content		HOS.4 Learning Strategies	Conscientious
Competency	HOS.2	Build Networks	I can build relationships with diverse individuals and expand my network of people who can help and support me.				
Skill	HOS.2.1	Build Relationships	How well do I build and maintain relationships to expand my network?	Building 21 Original Content	GCTP:1 Self-aware team member GCTP:3 Inquisitive world citizens	HOS.5 Social Skills and Responsibility	
Skill	HOS.2.2	Seek support and resources	How well do I seek out support and resources from my network?	Building 21 Original Content	GCTP:1 Self-aware team member	WA.4 Find Needed Help and Resources	
Skill	HOS.2.3	Create and maintain a positive digital/online footprint	How well do I maintain a positive digital footprint?	Building 21 Original Content	GCTP:1 Self-aware team member	HOS.5 Social Skills and Responsibility	Communication
Competency	HOS.3	Navigate My Setting	I can adhere to professional norms, effectively communicate and adapt to change in a variety of professional settings.				
Skill	HOS.3.1	Learn and follow professional norms	How well do I learn and follow professional norms?	Building 21 Original Content		CK.5 Career-Related Technical Skills HOS.1 Academic Behaviors	Adaptability
Skill	HOS.3.2	Communicate effectively	How effectively do I communicate with others?	Building 21 Original Content		CK.5 Career-Related Technical Skills CKH.3 Communication and Collaboration HOS.5 Social Skills and Responsibility	Adaptability, Communication
Skill	HOS.3.3	Flexibility and adaptability	How flexible and adaptable am I when changes need to be made?	Building 21 Original Content	OTUW.2 Generative thinkers—crea	HOS.2 Self-Direction and Perseverance HOS.3 Positive Mindsets HOS.4 Learning Strategies	Adaptability
Area	HW	Health and Wellness					



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Competency Framework

ELA HOS HW MATH NGE PD PE SCI SS VA WF WL

Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Competency	HW.1	Apply Knowledge of Health Concepts	I can apply knowledge of concepts related to health promotion and disease prevention to enhance my health.				
Skill	HW.1.1	Analyze the four dimensions of health	How well can I analyze the four dimensions of health?	GSP.HealthEd.1.B		CKH.5 Practical Life Skills	Content Knowledge
Skill	HW.1.2	Explain causes of health problems and solutions for prevention and reduction	How well can I explain causes of health problems and solutions for prevention and reduction?	GSP.HealthEd.1.C	OTUW.2 Generative thinkers—crea	CKH.5 Practical Life Skills	Content Knowledge
Skill	HW.1.3	Analyze key factors that impact health	How well can I analyze key factors that impact health?	GSP.HealthEd.1.D		CKH.5 Practical Life Skills	Content Knowledge
Skill	HW.1.4	Analyze developmental stages of life	How well can I analyze developmental stages of life?	GSP.HealthEd.1.E		CKH.5 Practical Life Skills	Content Knowledge
Competency	HW.2	Analyze Health Promotion and Risk Reduction	I can demonstrate the ability to practice health-enhancing behaviors and avoid or reduce health risks.				
Skill	HW.2.1	Evaluate health information, products, and services	How well can I evaluate different health information, products, and services?	GSP.HealthEd.2.A GSP.HealthEd.2.B		CKH.5 Practical Life Skills	Content Knowledge
Skill	HW.2.2	Demonstrate healthy practices and behaviors	How well do I demonstrate healthy practices and behaviors?	GSP.HealthEd.3.A	OTUW.1 Sense-makers—dealing v	CKH.5 Practical Life Skills HOS.2 Self-Direction and Perseverance HOS.5 Social Skills and Responsibility	Content Knowledge
Skill	HW.2.3	Demonstrate health risk reduction practices and behaviors	How well can I apply health risk reduction practices and behaviors?	GSP.HealthEd.3.B	OTUW.2 Generative thinkers—crea OTUW.3 Creative thinkers—refram	CKH.5 Practical Life Skills	Content Knowledge
Skill	HW.2.4	Evaluate the impact of cultural norms, public policy, and government regulation impact health	How do I make sense of the impact of cultural norms, public policy, and government regulation on health?	GSP.HealthEd.4.A	OTUW.2 Generative thinkers—crea OTUW.3 Creative thinkers—refram GCTP.3 Inquisitive world citizens v	CKH.5 Practical Life Skills	Content Knowledge
Skill	HW.2.5	Evaluate the impact of technology on health	How do I make sense of the impact of technology on health?	GSP.HealthEd.4.B		CKH.5 Practical Life Skills CKH.4 Information, Media, and Technology Skills	Content Knowledge
Competency	HW.3	Engage in Health Advocacy	I can demonstrate the ability to use interpersonal communication and advocacy skills; make decisions; and set goals to enhance my personal, family and community health.				
Skill	HW.3.1	Demonstrate effective communication skills to promote health	How well can I use effective communication skills to promote health?	GSP.HealthEd.5.A		CKH.5 Practical Life Skills	Communication, Content Knowledge, Contributors
Skill	HW.3.2	Influence and support others in healthy decision-making	How do I influence and support others in healthy decision-making?	GSP.HealthEd.5.B	OTUW.2 Generative thinkers—crea OTUW.3 Creative thinkers—refram GCTP.1 Self-aware team member	CKH.5 Practical Life Skills CKH.3 Communication and Collaboration	Communication, Content Knowledge, Contributors
Skill	HW.3.3	Enhance personal health through positive decision-making	How well can I enhance my health through positive decision-making?	GSP.HealthEd.5.C	OTUW.2 Generative thinkers—crea	CKH.5 Practical Life Skills	Content Knowledge
Skill	HW.3.4	Develop and analyze a personal health plan	How well can I develop and analyze a personal health plan?	GSP.HealthEd.5.D		CKH.5 Practical Life Skills HOS.4 Learning Strategies WA.2 Identify Opportunities and Set Goals	Content Knowledge
Area	MATH	Mathematics					
Competency	MATH.1	Use Mathematical Modeling to Solve Problems	I can apply mathematics to solve problems arising in everyday life, society, and the workplace.				
Skill	MATH.1.1	Ask questions	How well can I ask questions to help formulate math problems?	CCSS.MATH.PRACTICE.MP1			
Skill	MATH.1.2	Gather and organize information	How well can I gather and organize information to help me understand the problem?	CCSS.MATH.PRACTICE.MP2	MFL.1 Building the academic core MFL.4 Mathematical and numeric HFK.1 Curious people who are kn	CK.2 Math Core CKH.1 Critical Thinking and Problem Solving	Content Knowledge
Skill	MATH.1.3	Model the problem	How well can I represent the problem with a mathematical model?	CCSS.MATH.PRACTICE.MP4	MFL.1 Building the academic core MFL.4 Mathematical and numeric HFK.1 Curious people who are kn OTUW.2 Generative thinkers—crea	CK.2 Math Core CKH.1 Critical Thinking and Problem Solving	Content Knowledge
Skill	MATH.1.4	Generate, interpret, and evaluate results	How well can generate, interpret, and evaluate results of the model?	CCSS.MATH.PRACTICE.MP1 CCSS.MATH.PRACTICE.MP3 CCSS.MATH.PRACTICE.MP5 CCSS.MATH.PRACTICE.MP6	MFL.1 Building the academic core MFL.4 Mathematical and numeric HFK.1 Curious people who are kn OTUW.2 Generative thinkers—crea	CK.2 Math Core CKH.1 Critical Thinking and Problem Solving	Content Knowledge



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Competency Framework

ELA HOS HW MATH NGE PD PE SCI SS VA WF WL

Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Skill	MATH.1.5	Communicate and defend my solution	How well can I defend my solution and explain my process?	CCSS.MATH.PRACTICE.MP3	MFL.1 Building the academic core MFL.4 Mathematical and numeric	CK.2 Math Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	MATH.1.6	Reflect on my process and solution	How well can I reflect on what I learned through the problem solving process?	CCSS.MATH.PRACTICE.MP1	MFL.1 Building the academic core MFL.4 Mathematical and numeric	CK.2 Math Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Area	NGE	NextGen Essentials					
Competency	NGE.1	Design Solutions	I can plan, create, and implement a project in the world that has a positive impact on an authentic audience.				
Skill	NGE.1.1	Create a project plan	How well can I create a project plan?	Building 21 Original Content		CKH.1 Critical Thinking and Problem Solving HOS.1 Academic Behaviors	Conscientious
Skill	NGE.1.2	Create a high quality project	How well do I follow guidelines to create a high quality product?	Building 21 Original Content	OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	CKH.2 Creativity and Entrepreneurship HOS.1 Academic Behaviors	Conscientious, Content Knowledge
Skill	NGE.1.3	Solve a real-world problem	How well do I create a product that solves a real-world problem and impacts an authentic audience?	21CLD.Real-world problem-solving and innovation	OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	CKH.1 Critical Thinking and Problem Solving CKH.2 Creativity and Entrepreneurship	Confidence, Content Knowledge, Contributors
Skill	NGE.1.4	Use technology	How well do I use technology to building knowledge and demonstrate my learning?	CCSS.ELA-LITERACY.CCRA.W.6 ISTE.Students.4 ISTE.Students.5 ISTE.Students.7	GCTP.1 Self-aware team members	CKH.4 Information, Media, and Technology Skills	
Skill	NGE.1.5	Reflect on my work and my impact	How well do I reflect on my work and on my impact?	Building 21 Original Content	OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	HOS.5 Social Skills and Responsibility	Confidence, Contributors
Competency	NGE.2	Present to an Audience	I can give purposeful and effective presentations in formal settings, making strategic and appropriate decisions about content, language use, and style based on the audience, venue, and topic.				
Skill	NGE.2.1	Introduce presentation	How well do I introduce my presentation?	CCSS.ELA-LITERACY.SL.4	MFL.1 Building the academic core	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	NGE.2.2	Present findings and supporting evidence	How well do I organize, present, and support my ideas?	CCSS.ELA-LITERACY.SL.4	MFL.1 Building the academic core	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	NGE.2.3	Customize the presentation for the specific purpose, context, and audience	How effectively do I customize my presentation for my specific purpose, context, and audience?	CCSS.ELA-LITERACY.SL.4	MFL.1 Building the academic core	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	NGE.2.4	Use presentation aids	How effectively do I use different media to communicate my ideas?	CCSS.ELA-LITERACY.SL.5	MFL.1 Building the academic core MFL.5 Data and visual thinkers.	CKH.3 Communication and Collaboration CKH.4 Information, Media, and Technology Skills	Communication, Content Knowledge
Skill	NGE.2.5	Use language and body movement effectively	How well do I use my words, voice and body language to engage my audience?	CCSS.ELA-LITERACY.SL.6	MFL.1 Building the academic core	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	NGE.2.6	Give an effective conclusion	How well do I conclude my presentation?	CCSS.ELA-LITERACY.SL.4	MFL.1 Building the academic core	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Competency	NGE.3	Collaborate Effectively	I can work effectively with diverse teams to create high quality products.				
Skill	NGE.3.1	Interact and participate effectively with others	How well do I interact and participate with others on my team?	CCSS.ELA-LITERACY.SL.1.B CCSS.ELA-LITERACY.SL.1.D	GCTP.1 Self-aware team members GCTP.2 Essential co-creators—be	CKH.3 Communication and Collaboration HOS.5 Social Skills and Responsibility	Adaptability, Collaboration, Communication
Skill	NGE.3.2	Complete my part of the work	How well do I complete my part of the work?	21CLD.Collaboration	GCTP.1 Self-aware team members GCTP.2 Essential co-creators—be	CKH.3 Communication and Collaboration HOS.1 Academic Behaviors	Collaboration, Communication
Skill	NGE.3.3	Manage and resolve conflicts	How well do I manage and work to resolve conflicts when working with others?	CCSS.ELA-LITERACY.SL.1.D	GCTP.1 Self-aware team members GCTP.2 Essential co-creators—be	CKH.3 Communication and Collaboration HOS.5 Social Skills and Responsibility	Collaboration, Communication, Conflict Resolution



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Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Skill	NGE.3.4	Reflect on our product and process	How well do I reflect on how our team worked together and on my individual contributions to the team?	Building 21 Original Content	GCTP1 Self-aware team member GCTP2 Essential co-creators—ber	CKH.3 Communication and Collaboration WA.2 Identify Opportunities and Set Goals	Collaboration, Communication
Area	PD	Personal Development Self-reflection	IMPORTANT: Self-reflection not rated by teachers				
Competency	PD.1	Demonstrate Effective Effort	I can demonstrate a growth mindset in my approach to challenges, learning, and new opportunities.	MindsetWorks.Effective Effort Rubric			
Skill	PD.1.1	Take on challenges	How willing am I to take on challenges?	MindsetWorks.Effective Effort Rubric.1	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance HOS.3 Positive Mindsets	Confidence
Skill	PD.1.2	Learn from mistakes	How well do I learn from my mistakes?	MindsetWorks.Effective Effort Rubric.2	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance	Adaptability, Confidence
Skill	PD.1.3	Accept feedback and criticism	How well do I accept and apply constructive feedback?	MindsetWorks.Effective Effort Rubric.3	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance HOS.4 Learning Strategies	Adaptability, Collaboration, Confidence
Skill	PD.1.4	Practice and apply strategies	How well do I practice to improve and apply strategies to accomplish my goals?	MindsetWorks.Effective Effort Rubric.4	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance HOS.4 Learning Strategies	Confidence
Skill	PD.1.5	Persevere	How well to I keep trying even when things get hard?	MindsetWorks.Effective Effort Rubric.5	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance	Confidence
Skill	PD.1.6	Ask Questions	How well do I ask questions when I need help?	MindsetWorks.Effective Effort Rubric.6	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance HOS.4 Learning Strategies	Confidence
Skill	PD.1.7	Take Risks	How willing am I to take risks?	MindsetWorks.Effective Effort Rubric.7	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance HOS.3 Positive Mindsets	Confidence
Competency	PD.2	Make Informed Decisions	I can demonstrate effective decision-making skills to help me achieve my academic and personal goals.				
Skill	PD.2.1	Identify the decision	How well do I identify decisions I need to make?	Building 21 Original Content	LFL.1 Self-driven, self-directed. Cu	WA.1 Survey the Learn, Work, and Life Landscapes WA.2 Identify Opportunities and Set Goals	
Skill	PD.2.2	Choose and apply decision making process	How well do I follow a decision making process?	Building 21 Original Content	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance WA.1 Survey the Learn, Work, and Life Landscapes WA.4 Find Needed Help and Resources	Confidence, Conscientious
Skill	PD.2.3	Take responsibility and determine consequences	How well do I think about consequences and personal responsibility?	Building 21 Original Content	LFL.1 Self-driven, self-directed. Cu	HOS.5 Social Skills and Responsibility CKH.5 Practical Life Skills	Confidence, Conscientious
Skill	PD.2.4	Communicate my decision	How well do I communicate my decisions?	Building 21 Original Content	LFL.1 Self-driven, self-directed. Cu	CKH.3 Communication and Collaboration	Communication, Confidence
Skill	PD.2.5	Reflect on my decisions	How well do I reflect on decisions I make?	Building 21 Original Content	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance HOS.3 Positive Mindsets	Confidence, Conscientious
Competency	PD.3	Demonstrate Social Skills and Awareness	I can demonstrate the ability to show empathy, communicate well with others, handle conflict and manage my time on technology.				
Skill	PD.3.1	Recognize feelings and perspectives of others	How well can I recognize the feelings and perspectives of others?	Building 21 Original Content	GCTP1 Self-aware team member GCTP3 Inquisitive world citizens	HOS.5 Social Skills and Responsibility CKH.3 Communication and Collaboration	Adaptability, Collaboration, Communication
Skill	PD.3.2	Manage conflicts	How well do I recognize and manage conflicts in positive ways?	Building 21 Original Content	GCTP1 Self-aware team member GCTP3 Inquisitive world citizens	HOS.5 Social Skills and Responsibility CKH.3 Communication and Collaboration	Adaptability, Conflict Resolution



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Competency Framework

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Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Skill	PD.3.3	Use strategies to resolve conflicts	How well do I use strategies to resolve conflicts?	Building 21 Original Content	OTUW.3 Creative thinkers—refram GCTP.1 Self-aware team member GCTP.3 Inquisitive world citizens	HOS.5 Social Skills and Responsibility CKH.3 Communication and Collaboration	Collaboration
Skill	PD.3.4	Manage time on technology	How well do I manage the time on spend on technology?	Building 21 Original Content		HOS.5 Social Skills and Responsibility CKH.3 Communication and Collaboration	
Area	PE	Physical Education					
Competency	PE.1	Analyze Physical Fitness Activities and Outcomes	Demonstrate and apply fitness concepts.				
Skill	PE.1.1	Use fitness data to establish personal health goals	I can evaluate information gained from health-related fitness assessments in order to establish personal fitness goals.	GSP.PE.2.A	MFL.1 Building the academic core	CKH.5 Practical Life Skills WA.2 Identify Opportunities and Set Goals CK.2 Math Core	Content Knowledge
Skill	PE.1.2	Develop and implement a fitness plan	I can develop and implement a personal fitness plan, from established goals, that applies the principles of fitness and training.	GSP.PE.2.B	MFL.1 Building the academic core	WA.3 Design and Iterate Prototype Experiences	Content Knowledge
Skill	PE.1.3	Track and analyze progress toward fitness goals	I can track and analyze progress toward fitness goals and make adjustments as needed to maximize progress and goal attainment.	GSP.PE.2.C	MFL.1 Building the academic core	CK.2 Math Core	Content Knowledge
Competency	PE.2	Demonstrate Personal and Social Skills	Demonstrate and explain responsible personal behavior and responsible social behavior in physical activity settings.				
Skill	PE.2.1	Demonstrate collaboration skills during physical activities	I can demonstrate key collaborative skills while participating in physical activities, such as giving and accepting constructive feedback, and ensuring respectful inclusion of peers in activities.	GSP.PE.3.A	MFL.1 Building the academic core	HOS.2 Self-Direction and Perseverance HOS.5 Social Skills and Responsibility CKH.3 Communication and Collaboration	Content Knowledge
Skill	PE.2.2	Demonstrate responsible behavior during physical activities	I can demonstrate responsible and ethical personal behavior while participating in physical activities.	GSP.PE.3.B	MFL.1 Building the academic core	HOS.3 Positive Mindsets HOS.5 Social Skills and Responsibility	Content Knowledge
Skill	PE.2.3	Evaluate impacts on safety during physical activities	I can predict how etiquette/safety rules improve games/activities, contribute to productive participation, and how environmental modifications can impact safety.	GSP.PE.3.C	MFL.1 Building the academic core	CKH.3 Communication and Collaboration	Content Knowledge
Competency	PE.3	Advance Health and Movement Performance	Demonstrate the fundamental and specialized motor skills and apply principles of movement for improved performance and health.				
Skill	PE.3.1	Improve movement performance	Apply knowledge of skill-related fitness (agility, balance, coordination, power, reaction time, speed) to movement performance and overall health.	PA.PE.10.5.12.A	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages CKH.5 Practical Life Skills	Content Knowledge
Skill	PE.3.2	Develop and strengthen motor skills	I can incorporate and synthesize knowledge of motor skill development concepts to improve the quality of motor skills.	PA.PE.10.5.12.B	MFL.1 Building the academic core	CKH.3 Communication and Collaboration CKH.5 Practical Life Skills	Content Knowledge
Skill	PE.3.3	Apply knowledge of the impacts of exercise	I can apply my knowledge of the interaction between the type and duration of exercise and their effects on the body to make informed choices about physical activities and exercise regimens that will help me achieve my fitness goals.	PA.PE.10.5.12.D	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration CKH.5 Practical Life Skills	Content Knowledge
Area	SCI	Science					
Competency	SCI.1	Lead Scientific Investigations	I can plan and carry out a scientific investigation.				
Skill	SCI.1.1	Ask a scientific question	How well can I ask a scientific question?	NGSS.SciencePractice.1	MFL.1 Building the academic core HFK.1 Curious people who are kn OTUW.2 Generative thinkers—crea	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Skill	SCI.1.2	Formulate a hypothesis	How well can I formulate a hypothesis?	NGSS.SciencePractice.3	MFL.1 Building the academic core HFK.1 Curious people who are kn OTUW.2 Generative thinkers—crea OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Skill	SCI.1.3	Define and analyze variables	How well can I define the variables?	NGSS.SciencePractice.3	MFL.1 Building the academic core HFK.1 Curious people who are kn OTUW.1 Sense-makers—dealing v	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration	Content Knowledge



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Skill	SCI.1.4	Plan and organize an investigation	How well can I plan an investigation?	NGSS.SciencePractice.3	MFL.1 Building the academic core HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages CKH.1 Critical Thinking and Problem Solving CKH.4 Information, Media, and Technology Skills	Content Knowledge
Skill	SCI.1.5	Organize & strengthen plan	How well can I strengthen my plan using feedback?	NGSS.SciencePractice.3	MFL.1 Building the academic core HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration	Content Knowledge
Skill	SCI.1.6	Carry out the experiment	How well can I test my prediction by carrying out my plan?	NGSS.SciencePractice.3	MFL.1 Building the academic core HFK.1 Curious people who are kn OTUW.1 Sense-makers—dealing v	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Skill	SCI.1.7	Iterate using results	How well can I reflect on my findings and think about next steps?	NGSS.SciencePractice.3	MFL.1 Building the academic core HFK.1 Curious people who are kn OTUW.1 Sense-makers—dealing v OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Competency	SCI.2	Analyze and Interpret Data	I can analyze and interpret data to construct evidence-based explanations.				
Skill	SCI.2.1	Make meaning of data collected	How well do I identify relationships and patterns?	NGSS.NGSS.SciencePractice.3.4	MFL.1 Building the academic core MFL.4 Mathematical and numeric MFL.5 Data and visual thinkers.	CK.2 Math Core CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Skill	SCI.2.2	Represent data	How well can I represent the data visually?	NGSS.NGSS.SciencePractice.3.1	MFL.1 Building the academic core MFL.4 Mathematical and numeric MFL.5 Data and visual thinkers.	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration	Communication, Content Knowledge
Competency	SCI.3	Develop and Use Models	I can develop and use models to make predictions about phenomena, analyze systems, and communicate ideas.				
Skill	SCI.3.1	Create a model to represent a system	How well can I create a model to represent an event or system?	NGSS.NGSS.SciencePractice.3.2	MFL.1 Building the academic core OTUW.2 Generative thinkers—cre	CK.3 Science, Social Studies, Arts, Languages CKH.1 Critical Thinking and Problem Solving	Content Knowledge
Skill	SCI.3.2	Use the model to communicate ideas	How well can I use a model to predict outcomes or test a hypothesis?	NGSS.NGSS.SciencePractice.3.2	MFL.1 Building the academic core OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	SCI.3.3	Evaluate and refine models	How well can I use my understanding of the limitations of the model to make it better?	NGSS.NGSS.SciencePractice.3.2	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Competency	SCI.4	Write Technical Reports	I can engage in polished, professional technical writing for a range of purposes.				
Skill	SCI.4.1	Construct evidence-based explanations	How well do I communicate my findings and use data to support my claims?	CCSS.ELA-LITERACY.WHST.1.A CCSS.ELA-LITERACY.WHST.1.B CCSS.ELA-LITERACY.WHST.1.C CCSS.ELA-LITERACY.WHST.2.A	MFL.1 Building the academic core MFL.3 Compelling writers.	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	SCI.4.2	Identify and use appropriate text structure	How well can I choose and apply the appropriate text structure for my purpose?	CCSS.ELA-LITERACY.WHST.2.D	MFL.1 Building the academic core MFL.3 Compelling writers.	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	SCI.4.3	Follow writing conventions	How well did I follow writing conventions?	CCSS.ELA-LITERACY.WHST.1.C CCSS.ELA-LITERACY.WHST.1.D CCSS.ELA-LITERACY.WHST.2.A	MFL.1 Building the academic core MFL.3 Compelling writers.	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Area	SS	Social Studies					
Competency	SS.1	Analyze Events	I can apply historical literacy skills to analyze events both in the past and present to identify enduring patterns and themes and to answer questions about the nature of change and continuity over time.				
Skill	SS.1.1	Evaluate context and causes	How well can I evaluate the context and causes of events in past and present?	CCSS.ELA-LITERACY.RH.1, CCSS.ELA-LITERACY.RH.2, CCSS.ELA-LITERACY.RH.3, CCSS.ELA-LITERACY.RH.9, D2.HIS.1, D2.HIS.5, D2.HIS.14, D2.HIS.15	MFL.1 Building the academic core HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge



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Skill	SS.1.2	Analyze intended and unintended outcomes	How well can I analyze the effects, both intended and unintended, of events in the past and the present?	D2.HIS.14			
Skill	SS.1.3	Analyze outcomes as either change, continuity, or both	How well can I make sense of outcomes as either change, continuity, or both?	CCSS.ELA-LITERACY.RH.1, CCSS.ELA-LITERACY.RH.2, CCSS.ELA-LITERACY.RH.3, CCSS.ELA-LITERACY.RH.9, D2.HIS.2, D2.HIS.7, D2.HIS.14, D2.HIS.15	MFL.1 Building the academic core HFK.1 Curious people who are kn OTUW.2 Generative thinkers—cre	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration	Civic Literacy, Content Knowledge
Competency	SS.2	Analyze People and Perspectives	I can analyze multiple perspectives from credible sources to understand events in the past and present and to evaluate the importance of individuals and groups in shaping those events.				
Skill	SS.2.1	Analyze historical sources	How well can I analyze historical sources?	CCSS.ELA-LITERACY.CCRA.R.9, CCSS.ELA-LITERACY.RH.5, CCSS.ELA-LITERACY.RH.6, CCSS.ELA-LITERACY.RH.8, D2.HIS.6, D2.HIS.8, D2.HIS.9, D2.HIS.10, D2.HIS.11, D2.HIS.12, D2.HIS.13	MFL.1 Building the academic core MFL.2 Critical readers. HFK.1 Curious people who are kn OTUW.1 Sense-makers—dealing v OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages CKH.4 Information, Media, and Technology Skills	Content Knowledge
Skill	SS.2.2	Analyze multiple perspectives	How well can I analyze factors that shaped perspectives of people in the past?	CCSS.ELA-LITERACY.RH.1, CCSS.ELA-LITERACY.RH.2, CCSS.ELA-LITERACY.RH.3, CCSS.ELA-LITERACY.RH.6, CCSS.ELA-LITERACY.RH.9, D2.HIS.4, D2.HIS.5	MFL.1 Building the academic core MFL.2 Critical readers. HFK.1 Curious people who are kn OTUW.3 Creative thinkers—refram GCTP.3 Inquisitive world citizens	CK.3 Science, Social Studies, Arts, Languages CKH.4 Information, Media, and Technology Skills	Content Knowledge
Skill	SS.2.3	Evaluate the importance of people's actions in shaping outcomes	How well can I evaluate the importance of people's actions in shaping historical events?	CCSS.ELA-LITERACY.RH.1, CCSS.ELA-LITERACY.RH.2, CCSS.ELA-LITERACY.RH.3, CCSS.ELA-LITERACY.RH.9, D2.HIS.3, D2.HIS.16	MFL.1 Building the academic core HFK.1 Curious people who are kn HFK.2 Engaged participants who OTUW.2 Generative thinkers—cre	CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge	Civic Literacy, Content Knowledge
Competency	SS.3	Make an Impact	I can analyze enduring problems to take individual or collective action to positively impact my community.				
Skill	SS.3.1	Make a Positive Impact on my Community	How well can I apply a range of deliberative and democratic procedures to make decisions and take action in my classroom, school, and out-of-school civic contexts?	D2.CIV.7, D2.CIV.8		CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge WA.1 Survey the Learn, Work, and Life Landscapes	
Skill	SS.3.2	Examine Enduring Problems	How well can I identify and investigate specific problems or issues in my local, national, or global community?	D2.CIV.11, D2.CIV.12, D4.6	HFK.2 Engaged participants who OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram GCTP.3 Inquisitive world citizens	CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge WA.1 Survey the Learn, Work, and Life Landscapes	Civic Literacy, Content Knowledge
Skill	SS.3.3	Build Civic Knowledge	How well can I assess options for individual and collective action to address local, regional, and global problems?	D2.CIV.1, D2.CIV.2, D2.CIV.3, D2.CIV.4, D2.CIV.5, D2.CIV.13, D2.CIV.14, D4.7	HFK.2 Engaged participants who OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram GCTP.1 Self-aware team member GCTP.3 Inquisitive world citizens	CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge WA.1 Survey the Learn, Work, and Life Landscapes	Civic Literacy, Content Knowledge
Skill	SS.3.4	Take Action	How well can I plan and take action to address local, national, and global problems by engaging multiple stakeholders and reflecting on key learnings through the experience?	D2.CIV.6, D4.8	HFK.2 Engaged participants who OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram GCTP.1 Self-aware team member GCTP.2 Essential co-creators—be GCTP.3 Inquisitive world citizens	CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge CKH.2 Creativity and Entrepreneurship	Civic Literacy, Confidence, Content Knowledge, Contributors
Competency	SS.4	Apply Geographic Knowledge and Reasoning	I can use geographic representations to analyze relationships between place, culture, politics, and economics and evaluate human-environmental interactions and their impacts.				
Skill	SS.4.1	Display and explain spatial patterns	How well can I create maps to display and explain the spatial patterns of cultural and environmental characteristics?	D2.GEO.1	MFL.1 Building the academic core HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages CKH.4 Information, Media, and Technology Skills	Content Knowledge



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Skill	SS.4.2	Apply geographic tools	How well can I analyze maps, satellite images, photographs, and other representations to explain relationships between the locations of places and regions and their political, cultural, and economic dynamics?	D2.GEO.2, D2.GEO.3, D2	MFL.1 Building the academic core HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge	Content Knowledge
Skill	SS.4.3	Analyze relationships between human and environmental systems	How well can I analyze relationships and interactions within and between human and physical systems to explain reciprocal influences that occur among them?	D2.GEO.4, D2.GEO.7, D2.GEO.8, GEO.10	OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge	Civic Literacy, Content Knowledge
Skill	SS.4.4	Evaluate the impacts of human activity on environmental systems	How well can I evaluate the impact of human activities on the environmental characteristics of specific places and regions?	D2.GEO.5, D2.GEO.6, D2.GEO.9, D2.GEO.11, D2.GEO.12	OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge	Civic Literacy, Content Knowledge
Area	VA	Visual Arts					
Competency	VA.1	Create Visual Art	I can conceive and develop new artistic ideas and work.				
Skill	VA.1.1	Generate ideas for a visual art project	How well can I generate ideas for my art project?	NCAAS.1	MFL.1 Building the academic core OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages HOS.4 Learning Strategies CKH.2 Creativity and Entrepreneurship	Content Knowledge, Contributors
Skill	VA.1.2	Organize and develop a project plan	How well do I develop my project plan?	NCAAS.2, NCAAS.10	OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages HOS.2 Self-Direction and Perseverance CKH.2 Creativity and Entrepreneurship	Content Knowledge, Contributors
Skill	VA.1.3	Demonstrate understanding of the responsibilities that come with the freedom to create	How responsible am I when creating my project?	NCAAS.2		CK.3 Science, Social Studies, Arts, Languages HOS.1 Academic Behaviors HOS.5 Social Skills and Responsibility CKH.4 Information, Media, and Technology Skills	Content Knowledge, Contributors
Skill	VA.1.4	Refine and improve the work	How well do I revise and improve my project?	NCAAS.3		CK.3 Science, Social Studies, Arts, Languages HOS.3 Positive Mindsets CKH.3 Communication and Collaboration	Content Knowledge, Contributors
Competency	VA.2	Present Visual Art	I can interpret and share visual artwork.				
Skill	VA.2.1	Analyze, interpret, and select artistic work for presentation	How well do I analyze and select artistic work for presentation?	NCAAS.4	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration HOS.2 Self-Direction and Perseverance	Content Knowledge
Skill	VA.2.2	Use artistic techniques to present artwork effectively	How effectively do I present artistic work?	NCAAS.5	MFL.1 Building the academic core	CK.1 English Core CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration	Content Knowledge
Skill	VA.2.3	Convey meaning through the presentation of artistic work	How well do I convey a larger meaning through my presentation of artistic work?	NCAAS.6	MFL.1 Building the academic core	CK.1 English Core CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration CKH.4 Information, Media, and Technology Skills	Content Knowledge
Competency	VA.3	Evaluate Visual Art	I can evaluate how the arts convey meaning.				



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Skill	VA.3.1	Interpret meaning and intent in artistic work	How well do I analyze different interpretations of artistic work?	NCAAS.7, NCAAS.8	MFL.1 Building the academic core HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration CK.4 Interdisciplinary and Global Knowledge	Content Knowledge
Skill	VA.3.2	Use criteria to critique artwork	How well do I use criteria to critique artwork?	NCAAS.9	MFL.1 Building the academic core HFK.1 Curious people who are kn	CK.1 English Core CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration	Content Knowledge
Skill	VA.3.3	Relate artistic ideas and works with societal, cultural and historical contexts	How well can I relate artistic ideas to societal and cultural beliefs and values?	NCAAS.11	HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration CK.4 Interdisciplinary and Global Knowledge	Content Knowledge
Area	WF	Wayfinding					
Competency	WF.1	Discover, Plan, and Present My Learning Journey	I can discover my interests and passions to create my postsecondary plan. I can curate a portfolio of my best work, lead my conferences to share my progress and growth, and present my learning.				
Skill	WF.1.1	Discover my interests and plan my future	I can discover my interests and passions, conduct research related to postsecondary pathways I am interested in, and create my postsecondary plan.		LFL.1 Self-driven, self-directed. C LFL.2 Inventors of their own learn	WA.1 Survey the Learn, Work, and Life Landscapes WA.2 Identify Opportunities and Set Goals	
Skill	WF.1.2	Lead my conferences	I can lead a conference to explain my progress and growth in my competencies, share evidence of my work, and determine if I am on track to graduate by my target date.		MFL.1 Building the academic core	CKH.4 Information, Media, and Technology Skills CK.5 Career-Related Technical Skills HOS.1 Academic Behaviors	Communication
Skill	WF.1.3	Curate my portfolio	I can curate a portfolio of my best work and show evidence of my progress toward achieving the characteristics of our Portrait of a Graduate (Profile of a Learner) and the target performance levels and/or growth levels for my competencies.			HOS.3 Positive Mindsets CKH.3 Communication and Collaboration	Communication
Skill	WF.1.4	Present my learning	I can create a formal presentation aligned to the skills on the Present to an Audience competency to share evidence of my growth and progress aligned to our Portrait of a Graduate (Profile of a Learner) and our competencies. I can reflect on my readiness to graduate and how my learning journey has prepared me to achieve my postsecondary plan.			CKH.3 Communication and Collaboration	Communication
Competency	WF.2	Use My Writing Toolkit	I will engage with my PLP and learn how to look at my data dashboards.				
Skill	WF.2.1	Write an engaging cover letter	I can write an engaging cover letter that expresses my interest in a specific opportunity, communicates why I am right for the opportunity, and a specific way to follow up.		LFL.1 Self-driven, self-directed. C LFL.2 Inventors of their own learn	WA.1 Survey the Learn, Work, and Life Landscapes WA.2 Identify Opportunities and Set Goals	
Skill	WF.2.2	Write a well organized resume	I can create a professional resume and/or LinkedIn Profile that highlights my experiences, skills, and achievements.		LFL.2 Inventors of their own learn	WA.1 Survey the Learn, Work, and Life Landscapes WA.3 Design and Iterate Prototype Experiences	Communication
Skill	WF.2.3	Identify and secure references	I can secure and keep updated a diverse list of people who will give me a strong reference when needed.				
Skill	WF.2.4	Compose an email	I can compose well written emails that include all 6 parts, outline the purpose for the email, and ensure the formality matches the relationship I have with the recipient(s).				
Skill	WF.2.5	Create a slide deck	I can create well designed and engaging slide decks to enhance my presentations or projects.				
Competency	WF.3	Engage in Elective Exposure Experiences	I can engage in a variety of elective or leaving to learn experiences to gain exposure to different career options and to discover and pursue my interests and passions.				



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Experience	WF.3.1	Complete elective or leaving to learn exposure experiences	I can meet the the requirements for my all of my elective or leaving to learn exposure experiences.		LFL.2 Inventors of their own learn	CK.5 Career-Related Technical Skills	Communication
Competency	WF.4	Build My Essential Technology Skills	I can utilize technology and systems to create artifacts that demonstrate my learning and to track, monitor, and understand my growth and progress.				
Skill	WF.4.1	Take care of my laptop	I am responsible with my laptop and charger and take precautions to protect it from damage.		LFL.2 Inventors of their own learn	WA.1 Survey the Learn, Work, and Life Landscapes WA.3 Design and Iterate Prototype Experiences	
Skill	WF.4.2	Be prepared	I bring my laptop and charger every day so I can be prepared for my learning.		LFL.2 Inventors of their own learn	WA.1 Survey the Learn, Work, and Life Landscapes WA.2 Identify Opportunities and Set Goals WA.3 Design and Iterate Prototype Experiences WA.4 Find Needed Help and Resources WA.5 Navigate Each Stage of the Journey	Content Knowledge, Contributors
Skill	WF.4.3	Access my Google account	I can access and use all my Google Apps like Drive, Classroom, and others.			CKH.5 Practical Life Skills	
Skill	WF.4.4	Access my Slate account	I can access my Slate using my login information and I know who to contact if I forget my password.			CKH.2 Creativity and Entrepreneurship	Content Knowledge, Contributors
Skill	WF.4.5	Login to my computer	I can login to my computer and I know who to contact if I forget my password.				
Skill	WF.4.6	Manage my Google Drive	I can create, edit, share, and make copies of Google files to document and share my learning.				
Skill	WF.4.7	Access my task dashboard	I can access my task dashboard in Slate and use the filtering feature to manage my tasks.				
Skill	WF.4.8	Access my competency dashboard	I can access my competency dashboard to view my competency progress, performance, and growth in each content area.				
Skill	WF.4.9	Access my PLP	I can access my PLP and use it to set goals and communicate my progress to my advisor and family.				
Skill	WF.4.10	Create videos	I can edit video and create screencasts to demonstrate and share my learning.				
Competency	WF.5	Complete My Wayfinding Graduation Requirements (Choose/Add Requirements)	I can complete my additional Wayfinding Graduation Requirements to ensure I am ready and prepared to graduate from high school.				
Experience	WF.5.1	Complete the CBE Experience	I can complete all of the missions in the CBE Experience to build my understanding of CBE, Slate, and my PLP.				
Experience	WF.5.2	Participate in a mock interview	I can conduct myself professionally in a mock job interview.				
Experience	WF.5.3	Visit a postsecondary program	I visit colleges or other post-secondary programs to inform my future plans.				
Experience	WF.5.4	Complete my postsecondary plan	I can create and implement my plans for after I graduate high school.				
Experience	WF.5.5	Participate in work or internship experience	I can obtain and maintain a work or internship experience for a minimum of 8 weeks.				
Experience	WF.5.6	Implement my design capstone	I can identify a problem, issue, or challenge I am passionate about and then create and implement my solution in the world.				
Experience	WF.5.7	Complete my humanities experience	I can choose and complete a humanities experience that interests me.				
Experience	WF.5.8	Take the SAT or ACT	I can take the SAT or ACT exam.				
Experience	WF.5.9	Pass the ELA State Assessment (e.g., Keystone, MCAS)	I can successfully pass my ELA state required exam.				
Experience	WF.5.10	Pass the Math State Assessment (e.g., Keystone, MCAS)	I can successfully pass my Math state required exam.				
Experience	WF.5.11	Pass the Science State Assessment (e.g., Keystone, MCAS)	I can successfully pass my Science state required exam.				


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Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Area	WL	World Language					
Competency	WL.1	Communicate in Languages Other Than English	I can communicate effectively in more than one language in order to function in a variety of situations and for multiple purposes.				
Skill	WL.1.1	Engage in Conversations	How well can I participate in conversations to negotiate and share information?	NCSSFL-ACTFL.Interpersonal Communication	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages	Communication, Content Knowledge
Skill	WL.1.2	Present to an Audience of Listeners and Viewers	How do I present information to an audience of listeners and viewers?	NCSSFL-ACTFL.Presentation Communication.Spoken	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages	Communication, Content Knowledge
Skill	WL.1.3	Present to an Audience of Readers and Viewers	How do I present information to an audience of readers and viewers?	NCSSFL-ACTFL.Presentation Communication.Written	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages	Communication, Content Knowledge
Skill	WL.1.4	Interpret Spoken Language	How well can I understand and interpret what I hear?	NCSSFL-ACTFL.Interpretive Communication.Spoken	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Skill	WL.1.5	Interpret Written Language	How well can I understand and interpret what I read?	NCSSFL-ACTFL.Interpretive Communication.Written	MFL.1 Building the academic core MFL.2 Critical readers.	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Competency	WL.2	Interact with Cultural Competence and Understanding	I can interact with cultural competence and understanding.				
Skill	WL.2.1	Relate Cultural Practices to Perspectives	How do I analyze practices and perspectives?	NCSSFL-ACTFL.Intercultural Communication.Practices	HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Skill	WL.2.2	Relate Cultural Products to Perspectives	How do I analyze products and perspectives?	NCSSFL-ACTFL.Intercultural Communication.Products	HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Competency	WL.3	Develop Insight into the Nature of Language and Culture	I can develop insight into the nature language and culture in order to interact with cultural competence.				
Skill	WL.3.1	Compare the Language Studied and Your Own	How do I compare the language studied to my own?	NCSSFL-ACTFL.Intercultural Communication	HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Skill	WL.3.2	Compare the Culture Studied and Your Own	How do I compare the culture studied to my own?	NCSSFL-ACTFL.Intercultural Communication.Practices and Products	HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge

Entrepreneurial practices and mindset to prepare today's students for the workforce of tomorrow.

EDUCATOR WORKSHOP SERIES

The Entrepreneurship Across the Curriculum professional learning experience is designed to train teachers of all content areas on how to integrate the tools, principles, and practices of entrepreneurs into their specific discipline to give students a distinct career and life advantage. The EAC program includes:

Comprehensive Toolkit

Authentic, industry-standard activities and resources designed to build entrepreneurial capacity that can be integrated into any academic subject

Experiential Workshop Series

A three-session PD series that guides educators through the process of integrating entrepreneurship into their existing classes

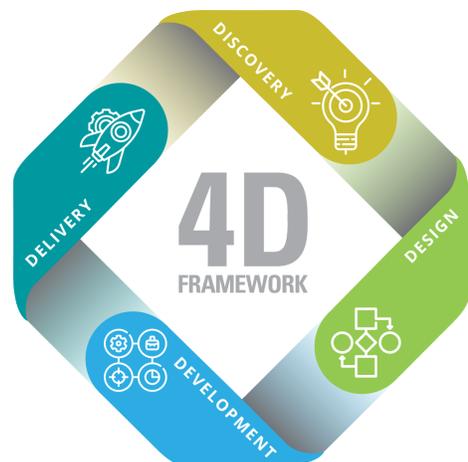
Professional Learning Community

A group-based experience with like-minded educators resulting in a dynamic cohort for support and collaboration longer-term

ENTREPRENEURS ARE MULTIDIMENSIONAL

In the workshop, educators learn to empower students in their classrooms to acquire critical skills and knowledge, practice new behaviors, and adopt new mindsets across four distinct dimensions of the entrepreneurial journey. Through this process teachers will embrace more than just the entrepreneurial mindset:

- **Discovery** Adopting a spirit of curiosity, creativity, imagination, innovation, optimism, problem-finding, and opportunity-seeking.
- **Design** Approaching challenges as inherently solvable through a process of complex thinking, creative problem solving, and purposeful design.
- **Delivery** Effectively communicating, packaging, and telling compelling stories of big ideas while actively connecting with and influencing key stakeholders.
- **Development** Actively experimenting, tinkering, testing, iterating, team-building, and project-managing.



Who Participates

- CTE educators in any discipline
- Teachers looking to integrate entrepreneurship skills into their courses
- School and teacher leaders

Benefits

- INTEGRATE real world, industry-standard, entrepreneurial tools, principles and practice into any desired subject.
- ENHANCE existing courses using Uncharted Learning's 4-D Entrepreneurship Framework
- PRACTICE creatively approaching problems and using core entrepreneurial tools
- COLLABORATE and develop a cohort with other educators

WORKSHOP STRUCTURE

Timing & delivery of the workshop series is customized to meet the specific needs of a district. It is facilitated by Uncharted Learning and delivered via a combination of on-site and virtual instruction.

EXPLORE THE DIMENSIONS OF ENTREPRENEURSHIP		
SESSION 1: DISCOVER & DESIGN	SESSION 2: DELIVER	SESSION 3: DEVELOP
<p>An immersive two-day experience to learn about problem discovery, innovation, creativity, and idea modeling.</p> <p>Creativity and Innovation Skills:</p> <ul style="list-style-type: none"> • Creative Brainstorming • Opportunity Recognition • Design Thinking • Idea Modeling / BMC 	<p>Re-engage with the cohort for ½ day to reflect on progress and step into how to plan and communicate big ideas to key stakeholders.</p> <p>Strategic Communication and Planning Skills:</p> <ul style="list-style-type: none"> • Agile Process • Sharebacks • Pitch Decks • Storytelling 	<p>In the final ½ day, solidify the practical application of building and executing the iterative design process with the target market.</p> <p>Project Management Skills:</p> <ul style="list-style-type: none"> • Rapid Prototyping • Stakeholder Engagement & Surveys • Iteration Strategies • Reflection

COMPREHENSIVE TOOLKIT

Participants are provided access to an Uncharted Learning “Member Hub” for one year. This online platform provides full access to all the resources participants are exposed to in the workshop series.

Toolkit includes:

- Kickstart Teacher Guide
- Videos
- Student Activities
- Lessons & Resources
- Slide Decks
- Assessments

BRING EAC TO YOUR SCHOOL OR DISTRICT [CONTACT US TO GET STARTED](#) info@unchartedlearning.org

Program Overview

freshINCedu offers elementary students an authentic opportunity to become entrepreneurs who identify problems and sell solutions.

ENGAGING | AUTHENTIC | EXPERIENTIAL

STUDENT EXPERIENCE

Students of freshINCedu progress through the milestones of starting up a new business: they identify a problem to solve, design and pitch a product concept, make and sell this product, and reflect upon the performance of their business idea. Evidence of learning includes a business model canvas, a budget and pricing model for the business, a product name and brand, a pitch deck, communications and marketing material, sales goals, and reflections. With involvement of local mentors and volunteers, students experience authentic learning, providing them an opportunity to feel empowered as entrepreneurs. Students leave the class having built and launched a business and product.

Course Learning Outcomes

1. Employ the Lean startup process using critical thinking and creativity
2. Use interpersonal communication skills with a variety of audiences
3. Collaborate with a variety of individuals and groups
4. Use real-life entrepreneurial tools
5. Reflect upon the characteristics and behaviors of entrepreneurs
6. Explain the economics of startup and commerce
7. Create marketing and sales collateral

Length

24 Instructional Days

freshINCedu includes 24 lessons plus a one week sales period. Each lesson is designed to run for one 45 or 60 min in length, or multiple 30 min sections. **Can be extended to accommodate other schedules.**

INCMarketplace

As a member school, you are provided a custom ecommerce website on our online marketplace as well as a Pop-Up Marketplace guide. When combined, student teams experience authentic sales environments both via online and in person.

We provide the resources needed for you to manage your ecommerce site on the marketplace and run a Pop-Up Marketplace at your school.

SCHOOL IMPLEMENTATION AND CONSULTATION

freshINCedu provides everything a school needs to help implement this authentic experience in their school. This includes an adoption consultation for school leadership, onboarding resources, and other implementation support, such as how to promote the program in your community.

Tech Requirements

Students in the course must be able to share digital documents, conduct online research, and communicate with others frequently. Thus, we recommend students have access to the internet as often as possible during this class. Access via tablets (e.g. iPads) is sufficient.

Materials Requirement

Students create products focused on reusing or recycling materials. Thus, students get creative in how they leverage materials to reuse. For example, some host a “classroom rummage day” where students bring in old things from their home that their parents are happy to donate.

Community

As a cornerstone of the freshINCedu program, community involvement offers a chance for students to have authentic, real-life experiences working with business professionals. Your school leverages the local community to directly act as mentors to the students business teams, guiding them through complex situations.

TEACHER TRAINING & SUPPORT

Member freshINCedu teachers are provided training and support. In an online training session, teachers learn the curriculum and how to support a project-based classroom. Teachers are also oriented to the professional learning network provided to all member teachers.

Training

Approx. 3–5 hours

Ongoing Support

- Program Implementation and Consultation
- Professional Learning Network

REACH OUT TO US TO SEE HOW YOUR SCHOOL CAN OFFER THIS PROGRAM: info@unchartedlearning.org

Course Summary

GRADES 6,7, or 8

A project-based unit of study where middle school students become entrepreneurs.

EXPLORE | DISCOVER | DESIGN | PITCH | CREATE | SELL | ANALYZE

Students become entrepreneurs in this program by evaluating the world around them, identifying a problem to solve, creating a product concept, selling this product in an e-commerce marketplace, evaluating the performance of their business idea, and iterating to incorporate learnings. Throughout the program, students create a portfolio of artifacts and document their journey from problem/solution ideation through evaluation of sales data. With involvement of local volunteer mentors, students experience authentic learning, providing an opportunity to become entrepreneurs. Students leave mxINCedu having built and launched a product. Evidences of learning include a business model canvas, a budget and pricing model for the business, a product name and brand, a pitch deck, communications and marketing material, sales goals, and reflections.

Length

41 Lessons

+12 days for interviewing, selling, and portfolio creation

mxINCedu includes 41 lessons, each designed with a range of minutes to best customize your class schedule. We recommend an additional 12+ days for interviewing and selling on the INCMarketplace and adding artifacts to the student portfolio.

Prerequisites

Although students are not required to have taken freshINCedu, this program complements freshINCedu in that it requires more complex analysis and evaluation is used to help drive business decisions.

Teacher Requirements

No business teaching experience required; the program is designed to train and support teachers of any discipline.

Course Alignment

mxINCedu is aligned to the National Consortium of Entrepreneurship standards, the Common Core Standards for Speaking and Listening, the Social Emotional Learning Standards, and 21st Century Learning and Innovation Skills standards.

Technology Requirements

Students in the course must be able to share digital documents, check email, conduct online research, and communicate with others frequently. Thus, we recommend students have access to the internet as often as possible during this class. Access via tablets (e.g. iPads) is sufficient.

Course Learning Outcomes

By the end of mxINCedu, students should be able to:

1. Identify the Create a roadmap of starting a business that contains major milestones.
2. Employ common methodologies, such build-measure-learn, in starting a business.
3. Create financial viability for the business.
4. Assess feedback and testing data to influence and improve iterations on the product or service.
5. Utilize entrepreneur qualities and characteristics to support the team and the business.
6. Pitch a business idea to a small group of peers and adults.
7. Improve business model through marketplace performance and data interpretation.

Materials & Delivery

As a mxINCedu member school, you get access to a comprehensive library of learning materials and assessments. This includes:

- Lesson plans for each unit lesson
- Project-based assessments and rubrics
- Slide decks for topic presentations
- Student facing materials available in Spanish
- Reading materials and resources
- Activities and exercises
- Templates and guides for students
- Digital Student Workbook

Additionally, as a member, we provide all the necessary tools and solutions to bring mxINCedu to your school, including:

- An eCommerce website for your students to sell their products
- Mentor recruitment and training tools
- Communication materials to promote your students' products and marketplace to the community

All content is delivered via a custom, online portal and can be integrated into LMS of choice.

Course Outline

<p>Phase 0 Explore Entrepreneurial Mindset</p> <p>Lesson 0.1: Defining an Entrepreneur</p> <ul style="list-style-type: none"> Identify the entrepreneurial qualities and strengths of others Identify and use personal entrepreneurial strengths 	<p>Lesson 0.2: Portfolio Creation</p> <ul style="list-style-type: none"> Understand the makings of a portfolio Identify artifacts to align with each attribute Create a portfolio where artifacts can be added Start the process of building a portfolio, which continues throughout the program 	<p>Lesson 0.3: Successful Startup Teams</p> <ul style="list-style-type: none"> Identify the strengths of others to improve team collaboration Identify and use the strengths of teammates to improve team dynamics <p>Phase 0 Reflection</p>
<p>Phase 1 Discover a problem, need, or want</p>	<p>Phase 2 Design a solution</p>	<p>Phase 3 Pitch a business idea</p>
<p>Lesson 1.1: Effective Communication</p> <ul style="list-style-type: none"> Effectively communicate amongst group members Listen to others to improve ideas and solutions <p>Lesson 1.2: Working Together to Solve a Problem</p> <ul style="list-style-type: none"> Use the formula for density to create a boat that holds pennies without sinking Design a boat that appeals to a buyer Present information about your design and solution <p>Lesson 1.3: The Problem Solving Process</p> <ul style="list-style-type: none"> Follow the problem solving process to create viable solutions to a problem <p>Lesson 1.4 Problem Discovery</p> <ul style="list-style-type: none"> Determine if a problem has a large enough impact and market to be worth solving Evaluate problems to identify level of impact 	<p>Lesson 2.1: Solution Ideation</p> <ul style="list-style-type: none"> Design a potential solution for a problem that can use available resources. Leverage resources around you, including materials, people, and tools <p>Lesson 2.2: Intellectual Properties</p> <ul style="list-style-type: none"> Identify uniqueness of their product or service Students can see authenticity and make connections with the process they are going through in the course <p>Lesson 2.3: Product Design</p> <ul style="list-style-type: none"> Start envisioning their product or service <p>Lesson 2.4: Developing Our Business Model Canvas</p> <ul style="list-style-type: none"> Develop a plan to make good decisions towards running a successful business 	<p>Lesson 3.1: Building a Prototype</p> <ul style="list-style-type: none"> Create a prototype for product or trial run for service Leverage resources around you including materials, people, and tools. Analyze data and make more informed decisions Build designed solution using available resources. <p>Lesson 3.2: Gathering Feedback through a Survey</p> <ul style="list-style-type: none"> Analyze articles to create good survey questions Write survey questions to gather feedback on our prototype and cost. <p>Lesson 3.3: Prepare a Pitch Slide Deck</p> <ul style="list-style-type: none"> Explain the role of investors and investment Create a pitch presentation that meets the needs of an investor audience.

Lesson 1.5: Employing Empathy

- View a problem from another person's perspective and its impact on them.
- Use empathy maps to better understand a problem and its impact on those who have it.

Lesson 1.6: Using Empathy to Solve a Problem

- Identify problems that others may have.
- Conduct customer interviews to help develop products
- Use potential customer interactions to better solve a problem

Lesson 1.7: Problem Statements

- Determine if a problem has a large enough impact and market to be worth solving.
- Describe the Jobs to be Done that the problem is preventing.

Lesson 1.8: Problem Statement Presentations

- Present an analysis: a problem and identify the key benefits of solving the problem for a target audience
- Create an argument to justify the importance of solving a particular problem
- Design a potential solution for a problem that can use available resources.

Phase 1 Reflection

Lesson 2.5: Revenue and Expenses

- Identify expenses associated with building a product or providing a service
- Explain expenses, cost, and revenue.
- Ensure business is financially viable.

Lesson 2.6: Getting Customer Feedback

- Test solution ideas with potential customers
- Create and conduct customer interviews, and if possible, observations of the problem

Lesson 2.7: Build-Measure-Learn Loop

- Analyze customer feedback to improve the solution to your product or service

Phase 2 Reflection

Lesson 3.4: Analyzing Survey Results

- Analyze data and make informed decisions
- Learn from the survey to make modifications to the prototype
- Take written feedback and make a visual representation
- Reflect and make changes to their pitch presentation and/or slide deck

Lesson 3.5: Preparing for the Pitch

- Explain the role of investor and why entrepreneurs use them
- Create a pitch presentation that meets the needs of an investor audience
- Build and manage a budget
- Ensure the business is financially viable

Lesson 3.6: Pitch for Investment

- Pitch a business idea to a small group of peers and adults.

Lesson 3.7: Learning From Pitch Feedback

- Analyze data and make informed decisions
- Build and manage a budget

Phase 3 Reflection

<p>Phase 4 Create the solution</p> <hr/> <p>Lesson 4.1: Project Management Skills</p> <ul style="list-style-type: none"> Identify their strengths and opportunities with their project management skills Set goals to improve Make agendas to improve time management and productivity <p>Lesson 4.2: Building Inventory</p> <ul style="list-style-type: none"> Build designed solution using available resources. Leverage resources around you including materials, people, and tools. Build and manage a budget. <p>Lesson 4.3: Creating Brand Materials</p> <ul style="list-style-type: none"> Create marketing materials including, brand, logo, and sales documentation Create a product or service name <p>Lesson 4.4: Perfecting Product Details</p> <ul style="list-style-type: none"> Create a page on the Marketplace that highlights their product/service with pictures and descriptions <p>Phase 4 Reflection</p>	<p>Phase 5 Sell the solution</p> <hr/> <p>Lesson 5.1a and 5.1b : Launch Day</p> <ul style="list-style-type: none"> Navigate and manage a product or service in an e-commerce store Navigate and manage a product or service in a pop-up store <p>Lesson 5.2: Creating Advertising and PR Materials</p> <ul style="list-style-type: none"> Create advertising materials to help market their business Define marketing vs. advertising <p>Lesson 5.3: Formal Business Communication</p> <ul style="list-style-type: none"> Adapt language to be appropriate for audience and purpose Understand the key components of communication to potential or actual customers Understand the impact of grammar, conventions, and tone on the reception of their communications. <p>Lesson 5.4: Sales Plans and Goals</p> <ul style="list-style-type: none"> Explain different approaches to selling and promoting a product Create appropriate sales goals with appropriate constraints Define appropriate measurement tactics to measure the success of the sales goals 	<p>Phase 6 Analyze the learning</p> <hr/> <p>Lesson 6.1: Final Data Analysis</p> <ul style="list-style-type: none"> Generate a report that summarizes the iterative cycles the product went through while on the marketplace. Explain where things went well and where they did not and how they would do things differently next time. Improve business model through marketplace performance and data interpretation. <p>Lesson 6.2: Final Report Presentations</p> <ul style="list-style-type: none"> Analyze current company standings Predict future outcomes for their business <p>Lesson 6.3: Entrepreneurial Portfolio Completion</p> <ul style="list-style-type: none"> Present on the narrative of their business, explaining what they did, what they learned, and how they adjusted Prepare a portfolio that demonstrates the narrative <p>Lesson 6.4: Celebration</p> <ul style="list-style-type: none"> Determine the best allocation for any profits made during the program <p>Optional: Delivery Day</p>
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Lesson 5.5: Sales Data Analysis and Interaction 1

- Measure potential customer response from the selling process
- Analyze data for strengths and weaknesses of the product and of marketing.
- Based on analysis, improve either product or marketing to increase traffic or sales.
- Using spreadsheets, track revenue.

Lesson 5.6: Goal Setting

- Reflect on their own goals
- Establish team goals to improve their business

Lesson 5.7: Product Fulfillment and Order Management

- Effectively communicate with customers.
- Track inventory and manage order fulfillment.
- Prepare products.

Lesson 5.8: Sales Data Analysis and Interaction 2

- Measure potential customers response from selling process
- Analyze data for strengths and weaknesses of the product and of marketing
- Based on analysis, improve either product or marketing to increase traffic or sales
- Improve business model through marketplace performance and data interpretation.

Phase 5 Reflection

Course Summary

GRADES 4, 5, or 6

A project-based unit of study where elementary students become entrepreneurs.

SEE | DESIGN | PITCH | MAKE | SELL | REFLECT

Students of freshINCedu progress through the milestones of starting up a new business: they identify a problem to solve, design and pitch a product concept, make and sell this product, and reflect upon the performance of their business idea. Evidence of learning includes a business model canvas, a budget and pricing model for the business, a product name and brand, a pitch deck, communications and marketing material, sales goals, and reflections. With involvement of local mentors and volunteers, students experience authentic learning, providing them an opportunity to feel empowered as entrepreneurs. Students leave the class having built and launched a business and product.

Length

24 Instructional Days

freshINCedu includes 24 lessons plus a one week sales period. Each lesson is designed to run for either one 45 or 60 min in length, or multiple 30 min sections.

Prerequisites

No prerequisites required for students. The program is designed to be used by all students

Teacher Requirements

No business teaching experience required; the program is designed to train and support teachers of any discipline.

Course Alignment

freshINCedu is aligned to the following standards

- Partnership for 21st Century Learning: 4Cs Standards
- Common Core Standards for Grade 5 Reading, Writing, Speaking and Listening
- Common Core Standards for Mathematical Practice
- C3 Dimension 2: Applying Disciplinary Concepts & Tools; Economics - Grade 5 : Economic Decision Making; Exchange Markets
- Next Generation Science Standards: Engineering Design

Technology Requirements

Students in the course must be able to share digital documents, check email, conduct online research, and communicate with others frequently. Thus, we recommend students have access to the internet as often as possible during this class. Access via tablets (e.g. iPads) is sufficient.

Course Learning Outcomes

By the end of the freshINCedu program, students should be able to:

1. Employ the Lean startup process using critical thinking and creativity
2. Use interpersonal communication skills with a variety of audiences
3. Collaborate with a variety of individuals and groups
4. Use real-life entrepreneurial tools
5. Reflect upon the characteristics and behaviors of entrepreneurs
6. Explain the economics of startup and commerce
7. Create marketing and sales collateral

Materials & Delivery

As a freshINCedu member school, you get access to a comprehensive library of learning materials and assessments. This includes:

- Lesson plans
- Project-based assessments and rubrics
- Slide decks for topic presentations
- Student facing materials available in Spanish
- Reading materials and resources
- Activities and exercises
- Templates and guides for students

Additionally, as a member, we provide all the necessary tools and solutions to bring freshINCedu to your school, including:

- An Online Marketplace (aka E-Commerce) website for your students to sell their products
- A Pop-up Marketplace guide for your students to sell their products live
- Mentor recruitment and training tools
- Communication materials to promote your students' products and marketplace to the community

All content is delivered via a custom, online portal and can be integrated into LMS of choice.

PHASES					
Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Phase 6
See a problem, need, or want	Design a solution	Pitch a business idea	Make the solution	Sell the solution	Reflect on learning
<p>Lesson 1.1: Entrepreneurs Identify personal entrepreneurial strengths.</p> <p>Lesson 1.2: Startup Teams Identify the strengths of teammates.</p> <p>Lesson 1.3: Seeing Problems/Needs/Wants Identify a problem worth solving.</p>	<p>Lesson 2.1: Brainstorming Solutions Design a solution that uses available resources.</p> <p>Lesson 2.2: Brainstorming Solutions: Work Day Design a solution that uses available resources.</p> <p>Lesson 2.3: Intro to Our Business Model Canvas Using a BMC, design a business idea.</p> <p>Lesson 2.4: Unique Value Proposition Continuing to use a BMC, design a business idea.</p> <p>Lesson 2.5: Finalizing Solutions of the BMC Completing the Business Model Canvas Solutions</p> <p>Lesson 2.6: Getting Customer Feedback Create solution interview</p>	<p>Lesson 3.1: Economics of Our Business Use spreadsheets to build a list of expenses. Determine price.</p> <p>Lesson 3.2 Day 1: Build a Prototype for Product or Trial Run for Service Create a prototype. Create a product name.</p> <p>Lesson 3.2 Day 2: Prototype Build or Trial Service Workday Continue development of prototype or trial run for service.</p> <p>Lesson 3.3: Pricing the Product or Service Price our product to make a profit</p> <p>Lesson 3.4: Communicating the Product or Service Idea Create enticing marketing and</p>	<p>Lesson 4.1: Building Inventory Build the solution inventory using available resources.</p> <p>Lesson 4.2: Communicating our Product Create brand materials, such as a logo.</p>	<p>Lesson 5.1: Advertising for Marketplace Brainstorm ideas of how to spread the word about marketplace and write ads</p> <p>Lesson 5.2: Sales and Selling Define how to sell product. Create sales goals. Determine sales metrics.</p> <p>Lesson 5.3a: Sell - INCMarketplace (optional) Test a solution. Explain an online e-commerce store. Use spreadsheets to track sales.</p> <p>Lesson 5.3b: Launch Pop-Up Marketplace Create interview questions. Test a solution. Measure</p>	<p>Lesson 6.1: Celebrate Self and Team Identify personal entrepreneurial strengths. Self-identify as an entrepreneur. Identify the strengths of teammates.</p>

<p>questions.</p> <p>Conduct solution interviews of family and friends.</p> <p>Test solution idea.</p> <p>Lesson 2.7: Learning from Customer Feedback</p> <p>Reflect upon performance of solution.</p> <p>Iterate on learnings.</p>	<p>sales materials that explain the benefit of a product or service to influence purchasing decisions</p> <p>Lesson 3.5: Preparing the Pitch</p> <p>Learn the role of the investor and why entrepreneurs need them</p> <p>Identify the information an investor needs and how to present them</p> <p>Lesson 3.6: Pitch for Investment</p> <p>Pitch a business idea to a small group of adults.</p> <p>Lesson 3.7: Learning from Pitch Feedback</p> <p>Reflect upon performance of pitch.</p> <p>Iterate on learnings.</p>		<p>customer reaction to product.</p> <p>Communicate with customers or potential customers.</p> <p>Use spreadsheets to track sales.</p> <p>Lesson 5.4 Analyze Sales Data</p> <p>How to calculate revenue from the sale and compare to original sales goals</p> <p>How to review data collected and identify what can be learned from it</p>	
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PHASE 1 - INTRODUCTION & IDEA CREATION

Students are introduced to what it means to be an entrepreneur, as well as the iterative process entrepreneurs use to create and build a product or service for the marketplace. Student teams start by outlining a product idea focused around the goal of reuse, reduce, or social impact. They are divided into teams of three or four - do **not** make the class work as one large team. Throughout the phase, students develop an understanding of how to work in teams and develop useful ways to use their skills as entrepreneurs.

Mentors are also introduced in class and begin working with teams. Students have an opportunity to experience the role and importance of mentors in guiding their business creation throughout the unit.

ENDURING UNDERSTANDINGS

Students will understand...

- Everyone has talents that can help them be entrepreneurs.
- Building a successful business starts with the identification of a problem worth solving.
- Working with teams and mentors has value and can help entrepreneurs be more successful.

ESSENTIAL QUESTIONS

- How do entrepreneurs launch products?
- What are the important skills entrepreneurs use every day?
- How does collaboration contribute to team success?

EVIDENCE OF LEARNING

- Problem Statement

AT - A - GLANCE: 30, 45, or 60 min lessons

Lesson 1.1 Entrepreneurs

Lesson 1.2 Startup Teams + Mentor Matching

Lesson 1.3 Seeing Problems, Needs, and Wants

MATERIALS AND RESOURCES

As indicated per lesson

PORTFOLIO ARTIFACTS

- Problem Statement
- Exit Ticket: How are You an Entrepreneur?

Lesson Plans (continued)

LESSON 1.1 - ENTREPRENEURS

INTRODUCTION

Students are introduced to what it means to be an entrepreneur and the reiterative process entrepreneurs go through to succeed. They find out that they will experience entrepreneurship in real life as they create a product, launch the product to sell, and learn how to make a profit.

This lesson sets the stage for the authentic learning students will experience through the course of the program.

Learning Outcomes

By the end of the lesson, students will be able to:

- Define the qualities and characteristics of entrepreneurs
- Identify personal entrepreneurial strengths

Materials

- freshINC Phase 1 Slide Deck
- Chart paper
- Markers
- Video links uploaded

Lesson Timing Options

Select one lesson option.

30 min lessons:

- Part 1: Discuss and Activity
- Part 2: Exit Ticket and Conclusion

45 min. lesson: All activities

60 min. lesson: All activities and supplements

Vocabulary

- Entrepreneur
- Socialpreneur
- Reiterate

TEACHER NOTES

Show students the freshINC Marketplace Introduction slide as referenced. This can be posted in class and used as to show students their progress through the unit. Inform students that they will be pitching for a small investment in the class shark tank.

This introduction can be done before or after the first activity which gets students thinking about what it means to be an entrepreneur.

ESSENTIAL QUESTIONS

- What does it mean to be an entrepreneur?
- What are the important skills entrepreneurs use every day?
- How can diverse teams succeed?

Lesson Plans (continued)

ACTIVITIES

DUR	ACTIVITY
<p>15 - 20 mins</p>  <p>Slide Deck in Course Resources</p>	<p>DISCUSS</p> <p>On a large sheet of chart paper, write the word 'Entrepreneur' in the center.</p> <p>Ask students, "What do you know about the word entrepreneur? What does it mean to you? Where have you heard it before?"</p> <p>Record student responses on the chart paper.</p> <p>Tell students, "An entrepreneur is a person who wants to change the future, and transforms their idea into a business that makes money. Entrepreneurs come in all 'shapes and sizes', including kids. Let's learn more about some kid entrepreneurs. Some people become entrepreneurs to solve social problems."</p> <p>*For a 60 min class, discuss the term Social Entrepreneur (a person with the mindset to solve a problem that benefits the social good). Have students come up with some ideas for what Social Entrepreneurs do.</p>
<p>15 mins</p>  <p>Slide Deck in Course Resources</p>	<p>VIDEO</p> <p>Show one or more of the following videos.</p> <ul style="list-style-type: none"> • Thomas Suarez: Thomas Suarez Ted Talk (4 min) about an 11 yr old entrepreneur who developed apps. • Moziah Bridges: Mo's Bows: Meet the Teenager Behind a Bow Tie Empire (4:42 min) - May also have students read Forbe's article, The 11-Year-Old Fashion Entrepreneur Behind 'Mo's Bows'. • Neha Gupta: Power of The Children Award 2012 (2 min) by the Children's Museum of Indianapolis (2 min). <p>*For 60 min. class, have students read Forbes article Meet The 30 Under 30 Social Entrepreneurs Making An Impact In 2018 by Alexandra Wilson</p>
<p>10 - 15 mins</p>  <p>Slide Deck in Course Resources</p>	<p>DISCUSS AND ASSESS</p> <p>Ask students, "What are some of the personal qualities these kids have that helped them become successful entrepreneurs?"</p> <p>Pause for 30 seconds for students to think before speaking. This allows intrinsic thinkers time to process the question.</p> <p>Continue, "Turn and talk with a partner or group."</p> <p>Then, ask partners or groups to share and record their answers on the "Entrepreneur" chart paper.</p> <p>Ask, "What do you notice about the qualities of entrepreneurs? Is there anything else you want to add to our chart?"</p> <p>Give students time to share their responses.</p>

Lesson Plans (continued)

 <p>Handout in Course Resources</p>	<p>Ask, “What kind of connections can we make between the different words we’ve written on this chart?”</p> <p>Draw lines to support connections students make between the different words. Using a different color marker is helpful for this.</p> <p>Tell students, “Entrepreneurs know their strengths, the qualities and characteristics that help them to be successful. On a blank paper, write your name in the middle.” [Note: you should do this as well to model.] Around your name, record the qualities and characteristics of an entrepreneur that you see in yourself.</p> <p>Let me give you an example: I am resourceful in the way I reuse or re-purpose materials; I know this is because I have [give an example of re-using or repurposing materials your students will understand, such as something you do at home].</p> <p>Another quality I have is coming up with ideas; all the interesting ways we are learning together come from these ideas, for example [give an example, such as a creative way you found to teach a concept or life hack you created].”</p> <p>Provide partners or groups time to share their entrepreneurial qualities. Have students create this list in a document to save and share with their team in Lesson 2.</p> <p>EXIT TICKET</p> <p>Using the Exit Ticket handout provided in your course resources, have students reflect on how they see themselves as entrepreneurs, responding to the questions below. For a 45 min class, have students respond to two of the following questions. For a 60 min class, have them answer all three questions:</p> <ul style="list-style-type: none"> • What are your entrepreneurial qualities and strengths? • Which kid entrepreneur connected with you? Why? • Why is it important for an entrepreneur to solve a problem and not just make stuff?
<p>5 - 10 mins</p>  <p>Slide Deck in Course Resources</p>	<p>CONCLUSION</p> <p>With a partner, have the students answer the following question: Why did each person create their business? What were they trying to do?</p> <p>The goal is to lead students to the conclusion that entrepreneurs don’t just make things – they solve problems.</p> <p>Tell students, “Entrepreneurs have all these great characteristics and what they do with them is to try and solve problems. Entrepreneurs are problem solvers that test their way to finding a solution. Think about one of the videos. What problem was he or she trying to solve?”</p> <p>As entrepreneurs you will be selecting a problem to solve. The problems you identify don’t have to be huge complex problems – they can be everyday problems or annoyances that you, your family, friends experience. As you go through your day from now on, pay attention to moments when you say, hear, or think...‘I wish there was a way to...’ or, ‘I hate it when...’ Jot these thoughts down or take a picture of the problem so you and your team can brainstorm possible solutions for them.”</p>

LESSON 1.1 / NOTES

OTHER REFERENCES

- [8 Kid Entrepreneurs to Watch](#) article by CNN Money
- [Empower Orphans](#) website
- [Social Entrepreneurs vs. Entrepreneurs: What's the Difference?](#) Article by Technori

Appendix D: Yearly Academic Calendar

Carolina Achieve



CAROLINA ACHIEVE ACADEMIC CALENDAR 2024-2025 SCHOOL YEAR



JULY 2024				
M	T	W	T	F
1	2	3	4	5
8	9	10	11	12
15	16	17	18	19
22	23	24	25	26
29	30	31		

AUGUST 2024				
M	T	W	T	F
			1	2
5	6	7	8	9
12	13	14	★15	16
19	20	21	22	23
26	27	28	29	30

SEPTEMBER 2024				
M	T	W	T	F
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30				

OCTOBER 2024				
M	T	W	T	F
	1	2	3	4
7	8	9	10	11
14	15	16	17	18
21	22	23	24	25
28	29	30	31	

NOVEMBER 2024				
M	T	W	T	F
				1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	27	28	29

DECEMBER 2024				
M	T	W	T	F
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30	31			

AUGUST	
11-14	Teacher Workdays
15	First Day of School

SEPTEMBER	
2	Labor Day Holiday

OCTOBER	
3	End of 1st Quarter/Early Release
4	Teacher Workday
7-9	Teacher Workdays (Allows teachers to regroup and plan)

NOVEMBER	
5	Teacher Workday
11	Veteran's Day Holiday
27	Teacher Workday
28-29	Fall Break (Holiday)

DECEMBER	
13	End of 2nd Quarter
16-20	Teacher Workdays (Allows teachers to regroup and plan)
23-31	Annual Vacation Leave/Christmas Holidays

JANUARY	
1	New Year's Holiday
2	Annual Vacation Leave
3	Teacher Workday
6-17	Intersession: Focus (All students and teachers)
20	Martin Luther King Jr. Holiday

FEBRUARY	
14	Teacher Workday

MARCH	
26	End of 3rd Quarter
27-28	Teacher Workdays (Allows teachers to regroup and plan)
31	Annual Vacation Leave

APRIL	
1-4	Annual Vacation Leave
7	Teacher Workday
18	Holiday

MAY	
26	Memorial Day (Holiday)

JUNE	
13	End of 4th Quarter/Last Day of School (Early Release)
16-18	Teacher Workdays

JANUARY 2025				
M	T	W	T	F
		1	2	3
6	7	8	9	10
13	14	15	16	17
20	21	22	23	24
27	28	29	30	31

FEBRUARY 2025				
M	T	W	T	F
3	4	5	6	7
10	11	12	13	14
17	18	19	20	21
24	25	26	27	28

MARCH 2025				
M	T	W	T	F
3	4	5	6	7
10	11	12	13	14
17	18	19	20	21
24	25	26	27	28
31				

APRIL 2025				
M	T	W	T	F
	1	2	3	4
7	8	9	10	11
14	15	16	17	18
21	22	23	24	25
28	29	30		

MAY 2025				
M	T	W	T	F
			1	2
5	6	7	8	9
12	13	14	15	16
19	20	21	22	23
26	27	28	29	30

JUNE 2025				
M	T	W	T	F
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30				

of Days End

1st Quarter	35 Days	Oct. 18
2nd Quarter	42 Days	Dec. 16
Focus	10 Days	Jan. 6-17
3rd Quarter	45 Days	March 26
4th Quarter	47 Days	June 13
Total:	179 Days	

Teacher Workdays	Holiday	Intersession: Focus (All students and teachers)	End of Quarter
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Appendix E: Daily and Weekly Schedule for Each Grade
Band the School Will Ultimately Serve

Carolina Achieve



STUDENT EXPERIENCE

DAILY/WEEKLY SCHEDULE



TIME	K-2
08:00 - 08:30	Morning Meeting
08:30 - 09:00	ELA/Math Small Group
09:00 - 10:00	Math
10:00 - 10:30	Snack/Recess
10:30 - 11:30	ELA
11:30 - 12:30	Enrichment
12:30 - 01:30	Advisory Lunch
01:30 - 02:30	Studio
02:30 - 03:30	Power Hour
03:30 - 04:30	After School Enrichment

TIME	3-5
08:00 - 08:30	Morning Meeting
08:30 - 09:00	ELA/Math Small Group
09:00 - 10:00	Math
10:00 - 11:00	ELA
11:00 - 12:00	Advisory Lunch
12:00 - 01:00	Studio
01:00 - 01:30	Recess
01:30 - 02:30	Enrichment
02:30 - 03:30	Power Hour
03:30 - 04:30	After School Enrichment

TIME	6-8
08:00 - 08:30	Morning Meeting
08:30 - 09:30	ELA
09:30 - 10:00	Recess
10:00 - 11:00	Math
11:00 - 12:00	Enrichment
12:00 - 12:30	Advisory Lunch
12:30 - 01:30	Science
01:30 - 02:30	Social Studies
02:30 - 03:30	Power Hour
03:30 - 04:30	After School Enrichment

MORNING MEETING - DAILY MEETING WITH STUDENT SUCCESS COACH AND TEAM - 4X/WEEK, GRADE LEVEL MEETING 1X/WEEK

POWER HOUR - OPPORTUNITY FOR STUDENTS TO WORK ON PERSONALIZED LEARNING WITH STUDENT SUCCESS COACH

K - 3 ENRICHMENT
 ART - 1X WEEK
 MUSIC AND MOVEMENT - 1X WEEK
 PHYSICAL EDUCATION - 2X WEEK
 GRADE LEVEL ASSEMBLY - 1X WEEK

6-8 ENRICHMENT - CHOOSE 1 PER SEMESTER
 (FINAL LIST TBD)
 ART, BAND, CHORUS, DRAMA,
 ENTREPRENEURIAL STUDIES

AFTER SCHOOL ENRICHMENT

(FINAL LIST TBD)

- CODING
- GIRLS ON THE RUN
- GIRLS WHO CODE
- INTERSCHOLASTIC ATHLETIC TEAMS (MIDDLE SCHOOL)
- LEGO FIRST ROBOTICS
- SCIENCE OLYMPIAD
- MATHCOUNTS
- DRAMA CLUB
- CHORUS
- BAND/ORCHESTRA
- STUDENT COUNCIL
- PUBLIC SPEAKING

Appendix F: Federal Documentation of Tax-Exempt Status

Carolina Achieve





The 501(c)(3) 1023 application for tax-exempt status was filed in early February of 2023. At time of application submission, Carolina Achieve has not received a notice. The IRS estimated a 6-month turn time on the 1023 application.

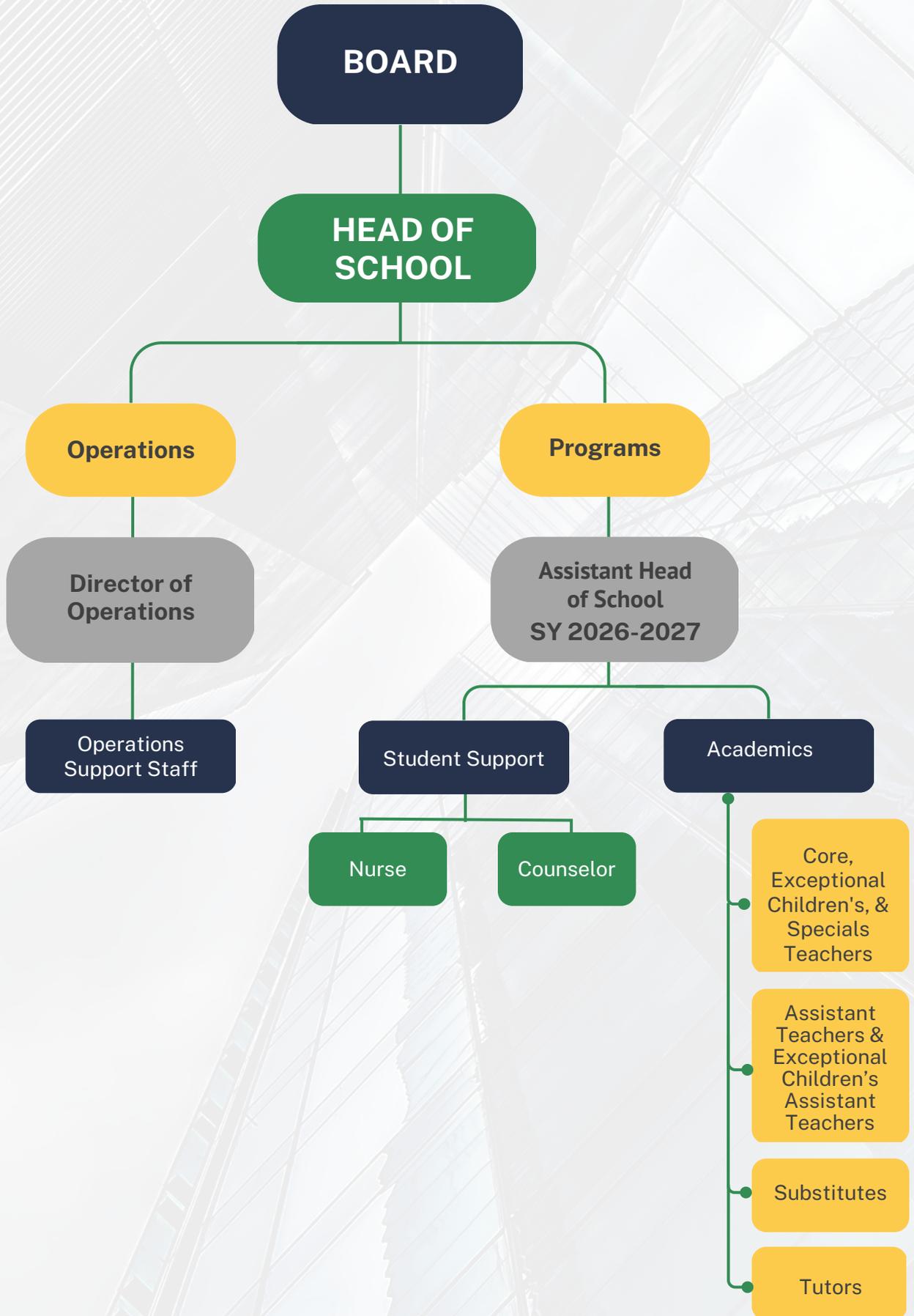
Appendix G: Organizational Chart

Carolina Achieve





CAROLINA ACHIEVE ORGANIZATIONAL CHART



Appendix H: Charter School Board Member Response
and Resume

Carolina Achieve



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: *Carolina Achieve*

2. Full name: *Charles David Lopez*

Home Address: *2703 Nereus Drive, Mebane, NC 27302*

Business Name and Address: *Greenscape, Inc., 412 Woodburn Road, Suite 002, Raleigh, NC 27605*

Telephone No.: *919-454-0622*

E-mail address: *charleslopez11@gmail.com / clopez@greenscapeinc.com*

3. Brief educational and employment history.

HEAD OF PEOPLE - Greenscape, Inc. - Raleigh, NC · 2021-Present

HUMAN RESOURCES MANAGER - Luxfer Gas Cylinders · Graham, NC · 2019- 2021

SR. HUMAN RESOURCES MANAGER – Door Store of America · Raleigh, NC · 2018 - 2019

DIRECTOR OF HUMAN RESOURCES – Reef Tropical Pool and Landscape – Miami, FL -· 2015-2017

CAREER TECHNICAL TRAINING MANAGER – Homestead Job Corps · Homestead, FL · 2011-2012

BOARD PRESIDENT, BOARD MEMBER, TESTING SPECIALIST - SIATech Charter High School - Miami-Dade, FL 2007-2012 -

Florida International University – B.A. Public Administration

Liberty University – M.A. Management & Leadership

Cornell University – Graduate Certificate– Strategic Leadership in HR

Liberty University – Doctoral Candidate – Strategic Leadership

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? *As a speaker at the Annual Charter School Summit hosted by the North Carolina Charter School Association, I was interested in learning more about a local charter in Hillsborough, Orange County, NC. I live in Orange County. My family have a commitment to provide back to our local community. We feel strongly that this opportunity fits right in with our family value system, and it is an opportunity to give back through this avenue.*
6. What is your understanding of the appropriate role of a public charter school board member? *My understanding of this role is one of public governance and accountability, to ensure that what we committed to is achieved with integrity, accountability, honesty, and support. This means we are a committed member of the school community, engaged, and holding ourselves and the team at-large accountable for success for all stakeholders – educators, staff, children, parents, administration, 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 previous experience as a Charter School Board member and Board President for a Charter School in Miami-Dade, FL named SIATech Charter High School. SIATech, <https://www.siatechschoools.org> is nationally recognized in working with the Job Corps program from the Dept of Labor. The program has been a success in reaching to at-risk children. The Miami-Dade charter evolved into three campuses. We faced many unique challenges working with the Department of Labor and the local county School Board. Yet, we reminded ourselves that the big picture was the success of the student(s).
8. Describe the specific knowledge and experience that you would bring to the board.
I believe my passion for seeing kids succeed, experience in school administration and business acumen, and the community support in being an active member in our local community are attributes, knowledge, and experience that I bring to this board.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
My understanding of the school's mission and guiding beliefs are that every child, regardless of school choice, can succeed – through the lenses of creativity, engagement, intentionality, and entrepreneurship. An important part of this is to add supplemental skill sets that would benefit the student through college or through entrepreneurship.
2. What is your understanding of the school's proposed educational program?

The academic philosophy ensures that we put our learners at the center of a meaningful designed learning experience through a competency-based education model to include supplemental training through entrepreneurship lenses.

3. What do you believe to be the characteristics of a successful school?

A successful school is one that is engaged with all stakeholders – students, parents, and the local community. With all partners intentionally engaged in our students' success, our students will be set up for promise.

4. How will you know that the school is succeeding (or not) in its mission?

There are several key metrics that would showcase strength or weakness. Number of applicants, year over year retention, academic performance by student/grade/school, and the strength of community partnerships/engagement.

Governance

1. Describe the role that the board will play in the school's operation.

The role of the board is one of public governance and accountability, to ensure that what we committed to is achieved with integrity, accountability, honesty, and support. This means we are a committed member of the school community, engaged, and holding ourselves and the team at-large accountable for success for all stakeholders – educators, staff, children, parents, administration, community.

2. How will you know if the school is successful at the end of the first year of operation?

First school year is full of many learning opportunities. However, these learning opportunities combined with re-enrollment numbers, community engagement, increased parent involvement, and new applications will showcase a strong first year of operation.

3. How will you know at the end of five years of the schools is successful?

By year five, the school would have set a track record of progressive measures from year 1, 2, yielding increasing numbers (metrics) year over year. Overall, the school should achieve a primary level of value-add to all stakeholders – students, parents, and the community alike.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

The main responsibility for the board is to ensure the school leadership is held accountable for its success. However, a relationship and metrics approach would help us garner success as accountability partners – as the board also plays a role in its success.

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?

Following ethical guidelines, a personal moral compass, and code of conduct, I would initially make the chair aware of such findings or allegation, allowing room for proper investigation into matters.

*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.

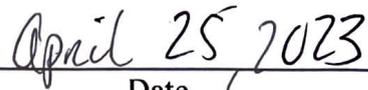
Certification

I, **Charles Lopez**, 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 **Carolina Achieve Charter School** is true and correct in every respect.

Signature



Date



Accomplished and influential Human Resources & Safety professional with significant experience in organizational transformation, employee engagement, policy development, process optimization, and executive advisement. A management leader who demonstrates expertise in contract negotiation, risk mitigation, benefit/compensation oversight, and organizational safety. Committed to building and maintaining high employee morale within a positive company culture. Earned Master of Arts degree in Management and Leadership, completed a Graduate Program from Cornell in Strategic Human Resources Leadership, and currently, a Doctoral Candidate in Strategic Leadership at an esteemed program.

Areas of Expertise

- HR Management Consultation
- Program & Policy Development
- Relationship-Building
- Benefits & Compensation
- Coaching & Mentoring
- Bilingual: Spanish/English
- Board Advisory

Professional Experience

HUMAN RESOURCES BUSINESS PARTNER - CloseHR Connections · Cary, NC · 2022 - Present

Fractional HR Services for Small Businesses

HEAD OF PEOPLE - Greenscape, Inc. - Raleigh, NC · 2021-2022

Formalized Human Resources Department and enhanced the people operations experience.

HUMAN RESOURCES MANAGER - Luxfer Gas Cylinders · Graham, NC · 2019- 2021

Re-established Human Resources Department and function at local manufacturing facility.

SR. HUMAN RESOURCES MANAGER – Door Store of America · Raleigh, NC · 2018 - 2019

Formalized Human Resources department and centralized all administrative functions.

DIRECTOR OF HUMAN RESOURCES – Reef Tropical Pool and Landscape · Key Largo, FL · 2015 - 2017

Established Human Resources department; formalized and centralized all functions.

INSTRUCTOR (YOUNG ENTREPRENEURS ACADEMY); INTERNSHIP COORDINATOR & ADVISOR (SCHOOL OF BUSINESS) - MIAMI DADE COLLEGE · Kendall/Homestead, FL · 2012 - 2013

CAREER TECHNICAL TRAINING MANAGER – Homestead Job Corps · Homestead, FL · 2011-2012

Managed vocational training for 500+ students while supervising all instructors and staff members. Established administrative processes and procedures for effective in-house protocols and processes.

BOARD PRESIDENT, BOARD MEMBER, TESTING SPECIALIST - SIATech Charter High School - Miami-Dade, FL 2007-2012 - A Public Charter School focused on at-promise students in coordination with Homestead Job Corp.

Education & Certifications

Doctoral Candidate, Strategic Leadership

LIBERTY UNIVERSITY | Lynchburg, VA

Graduate Program, Strategic Human Resources Leadership

CORNELL UNIVERSITY | Ithaca, NY

Master of Arts, Management and Leadership

LIBERTY UNIVERSITY | Lynchburg, VA

Bachelor of Science, Public Administration

FLORIDA INTERNATIONAL UNIVERSITY | Miami, FL

Professional Human Resources Certificate (PHR) – 2020-2026

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: Carolina Achieve

2. Full name: Miller, Anjanette

Home Address: 608 Dunbar St. Durham, NC 27701

Business Name and Address:

Telephone No.: 972-978-4833

E-mail address: anjmilller2512@gmail.com

3. Brief educational and employment history.

- MA Humanities, University of Texas, Dallas; BA Psychology, University of Texas
- Co-Founder and Chief Strategy Officer, [Echo](#) (2022 - Present)
- Executive Director, Audacity Labs (2021 - 2022)
- Founder, ASNC. LLC (2019 - Present)
- Founder, Academic Solutions (1999 - 2019)

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: xx

How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school? *Yes, I was recruited by Tiffany Alrefae*

I strongly believe in the mission of Carolina Aspire. As an educational consultant and an entrepreneur, I feel strongly that our current educational model is not preparing youth today for the rapidly changing educational and workforce landscapes. Current research indicates that an entrepreneurial mindset empowers youth with 21st century skills needed to navigate these landscapes.

What is your understanding of the appropriate role of a public charter school board member?

Provide governance and oversight; staying mission-driven.

- i. 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.

As an educational consultant as well as an entrepreneur, I am uniquely suited to serving on this board. Additionally, I currently work with middle and high school students who participate in an after school program focused on entrepreneurship and entrepreneurial mindsets. We develop program offerings to youth in the Triangle that provide education, exposure and experience in startups, social entrepreneurship and innovation, technology and project management.

- ii. Describe the specific knowledge and experience that you would bring to the board.

See above. Almost 30 years working with youth, families, support organizations and public/private institutions.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

The school will prepare students to be innovative thinkers. They will be active and collaborative members of the school community through the acquisition and application of an entrepreneurial mindset. These are the skills needed today to navigate workforce and higher education landscapes.

2. What is your understanding of the school's proposed educational program?

The school will have a strong academic foundation in core subjects with an overlay of entrepreneurial skills throughout the program. We will be partnering with Uncharted Learning – an entrepreneurial curriculum that will ensure we will meet our goals.

3. What do you believe to be the characteristics of a successful school?

Students and parents are actively engaged and proud ambassadors for the school. Student academic growth and achievement improves year over year. Students, teachers and families collaborate to build a supportive community.

4. How will you know that the school is succeeding (or not) in its mission?

Strong enrollment and academic performance that exceeds the county standardized test scores. A mutually supportive community that encourages student growth. Participating in external evaluations from the State and other educational organizations. Eventually, ant accreditation from Advanced Ed.

Governance

1. Describe the role that the board will play in the school's operation.

Each Board member brings expertise to address all important areas of oversight.

2. How will you know if the school is successful at the end of the first year of operation?

The school has low attrition for teachers and students. Academic performance is strong including performance on standardized tests. The school will have healthy enrollment trends.

3. How will you know at the end of five years if the school is successful?

The school will be thriving with full enrollment and a waiting list of potential students. We have a dynamic and diverse faculty. The school will be accredited by Advanced Ed. The Charter will be renewed.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Active oversight and effective governance.

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 would address the situation directly and resolve any issues as quickly as possible.

*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.

Certification

I, **Anjanette Miller**, 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 **Carolina Achieve** Charter School is true and correct in every respect.

Anjanette Miller _____ April 3, 2023 _____

Signature

Date

Anjanette Miller

Anjmiller2512@gmail.com

972-978-4833

Linkedin.com/in/Anjanette-miller

HIGHLIGHTS OF EXPERTISE:

Consultative, strategic business leader with 25+ years of experience scaling and executing mission-driven work.

EDUCATION:

MA Humanities

BA Psychology

PROFESSIONAL WORK EXPERIENCE:

ECHO: Co-Founder; Chief Strategy and Programming Officer

05/15/2022 – Present

- Strategic planning to prepare for ECHO: a merged organization of Helios and Audacity Labs
- Evaluation of each individual organizations current programming and design of new offerings of merged organization
- Liaison for Community Partners, Programming and Growth, and Marketing board committees
- Facilitate youth team of advisors to plan for a youth center

AUDACITY LABS: Managing Director, Executive Director

01/04/2021 – Present

- Oversee the day-to-day organizational programming and operations.
- Work with the Board and Executive Team to manage organizational finances: coordinating with Duke University's Work Study Reimbursement system, reporting outcomes to funding partners, and assist in fundraising.
- Awarded a \$1 mil grant from the City of Durham to pilot a stand-alone youth center for entrepreneurship
- Brokered a merger with another non-profit for more efficient and effective impact in the community
- Develop and implement new initiatives, fundraising campaigns, and marketing to increase brand awareness.
- Systemize current programming to adjust to organization's growth and prepare to scale.
- Cultivate and maintain community collaboration and partnerships.
- Liaise with stakeholders.
- Collaborate with analytics team to develop data-driven solutions to improve organizational impact and efficiency.

ASNC, L.L.C.: Founder/CEO

08/23/2019 - Present

- Consulting services focused on bridging the gap to higher education opportunities for underserved students from marginalized communities.
- Cooperative partnership with local non-profits, private and public schools.
- Cooperative partnership with local alternative school, providing diagnostic academic profiling for foreign athletes applying to U.S. colleges and universities.

ACADEMIC SOLUTIONS: Founder/CEO

9/01/1999 – 6/6/2019

- Managed the day-to-day operations of a private academic tutoring and advocacy center serving an average of 150-175 private students per week; 30-40 Summer Intensive Group Camps.
- Hired and maintained a staff of 2 full-time and 20-25 part-time employees; supervised summer interns.
- Oversaw a budget of \$500k gross sales; annual payroll of \$280k.
- Developed and maintained ACT/SAT/GRE/GMAT test prep curriculum. 77% of students reached their goals scores in 2018; 75% in 2017; 70% in 2016.
- Created a cooperative partnership with Uplift College Preparatory schools to train staff facilitating ACT prep to at-risk and first-generation high school students.
- Coordinated with Texas Tech University ISD online school as a special project site, allowing AS to implement the K-12 curricula to elite athletes and other non-traditional students.

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: Carolina Achievement Academy

2. Full name: Thomas Nechyba

Home Address: 2719 McDowell Rd, Durham, NC 27705

Business Name and Address: Department of Economics, Duke University, Durham, NC 27708

Telephone No.: 919-302-7377 (cell)

E-mail address: nechyba@duke.edu

3. Brief educational and employment history.

- 1986-1989 – University of Florida, BA (Economics)
- 1989-1994 – University of Rochester, PhD (Economics)
- 1994-2000 – Stanford University, Assistant Professor (on leave 9/1999-4/2000)
- 1999-2003 – Duke University, Associate Professor
 - a) (Founding) Director, Economics Center for Teaching (EcoTeach), 2000-2003, 2011-2016, 2022-Present
 - b) Chair, Department of Economics, 2003-2009
 - c) Director, Social Science Research Institute, 2012-2019
 - d) (Founding) Director, Master in Interdisciplinary Data Science (MIDS), 2017-2019
- 2003-Present – Duke University, Professor of Economics & Public Policy Studies

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:

I was a founding board member of Excelsior Academy Charter School in Durham, NC – and served on the governing board for 5 years. I was also a founding board member of DataWorks, a non-profit with the mission to democratize data for communities to advocate for change, where I served as Board President for 3 years. I am currently on the Board of Directors of Claremont Lincoln University (Claremont, CA) (since 2021) as well as the Lincoln Institute of Land Policy (Cambridge, MA) (since 2010) (where I have chaired the board committee on budget and finance).

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 first put in touch with John Oxaal by a mutual friend, Emma Rasiel who is a colleague of mine at the Economics Department at Duke. At the time, John was interested in exploring the possibility of helping to start a charter school, and Emma was aware that I had written on the general topic in my academic career and had served on founding board for another charter school that has succeeded in Durham. Over the course of a number of conversations with John, the idea of me serving on this board arose. I was pleased to accept the invitation given my strong support of the mission of the school that John envisioned and my assessment that such a school would be of great benefit to the greater Durham area.

6. What is your understanding of the appropriate role of a public charter school board member?

A public charter school board should provide general oversight of the school -- help develop the vision and mission and oversee its implementation with careful attention to metrics for success as well as traditional board governance. Among the most important tasks for the board is hiring the school's director who manages the day-to-day activities in the school.

7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

As noted above, I was a founding board member of Excelsior Academy Charter School in Durham, NC – and served on the governing board for 5 years. I was also a founding board member of DataWorks, a non-profit with the mission to democratize data for communities to advocate for change, where I served as Board President for 3 years. I am currently on the Board of Directors of Claremont Lincoln University (Claremont, CA) (since 2021) as well as the Lincoln Institute of Land Policy (Cambridge, MA) (since 2010) (where I have chaired the board committee on budget and finance).

8. Describe the specific knowledge and experience that you would bring to the board.

My academic work of 30 years falls mainly in the area of economics of education. My research in this area has been funded by major funding agencies like the National Science Foundation and the Spencer Foundation, and I have been involved in significant administrative roles in higher education (as noted above). I have also served on a number of boards, particularly in the areas of program and budget as well as academic measurement.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

The school's mission is based on the guiding belief that every child can grow up to live a productive life and assume a valued place in society – regardless of whether the child ends up attending a traditional college or not. Key to this is the development of not only hard knowledge but soft skills – creativity, critical thinking, entrepreneurial drive, an ability to work with others, etc. Our mission is to ensure a valued place for every child by developing these skills alongside academic excellence appropriate to each child's path.

2. What is your understanding of the school's proposed educational program?

The school's foundation will be a strong academic set of classes in core subjects – and these will be supplemented with programming to develop soft skills, particularly those critical to entrepreneurial success in any walk of life

3. What do you believe to be the characteristics of a successful school?

A successful school is one that engaged its students in their own success – and, whenever possible, their parents as well. This leads to measurable academic growth, increased collaboration within the school and across the community, growing partnerships that invest in children, etc.

4. How will you know that the school is succeeding (or not) in its mission?

There are several key measures to any charter school's success. First, enrollment applications – a more successful school will generate more interest among parents and therefore more applications to the school. Second, improving academic performance as measured by standard metrics across schools. Third, an increasingly engaged community that forms partnerships and networks aimed at helping children succeed. Fourth, low turnover among teachers and staff.

Governance

1. Describe the role that the board will play in the school's operation.

The board is here to set the direction of the school and provide broad oversight across all areas – not to manage the school. (That is the task of the head of school.) A successful board will therefore have a diverse set of individuals with different strengths so as to collectively allow the board to meet its oversight role.

2. How will you know if the school is successful at the end of the first year of operation?

At the end of the first year, a successful school will see relatively little turnover of teachers and staff, re-enrollment of the vast majority of its students for the coming year, and increased interest from parents as expressed in applications to join the school.

3. How will you know at the end of five years of the schools is successful?

In addition to the success measures in (2), by the end of the fifth year, the school should have a consistent track record of adding value – i.e. improving academic achievement across the years of students who remain in the school.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

The board, through its various committees, will need to ensure that management is held accountable for the ongoing progress of the school.

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?

Assuming the member(s) in question do not involve the chair of the board, I would begin by alerting the board chair who would then use the board's governing structure to address the potential issues.

*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.

Certification

I, Thomas Nechyba, 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 Carolina Achievement Academy Charter School is true and correct in every respect.

Signature



Date 4/13/2023

Charter School Board Member Information Form

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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:

2. Full name: John Thomas Oxaal

Home Address: 20 Rountree Lane Bahama, NC 27503

Business Name and Address:

Telephone No.: (650) 380-0138 (C)

E-mail address: JOXAAL@SRFUNDS.COM

3. Brief educational and employment history.

- 1976 - BS in Biomedical Engineering at Duke University
- 1976 – 1980: Biomedical Engineer at Duke University Medical Center working on Development of World's first Phased Array Ultrasound Machine.
- 1980-1981: MBA at University of Chicago specializing in Economics and Finance
- 1981 – 1985: Analog Devices, a semi conductor company: Product Marketing Manager and co Founder of the Digital Signal Processing Division. The DSP Division became a Billion dollar division of Analog Devices
- 1985 – 1989: Weitek: Product Marketing Manager for the first out sourced semiconductor company. Led the development of many Weitek products eventually culminating in an IPO in 1988.
- 1989-1991 OPTA – Vice President of marketing and sales for the first digital still camera developer.

- 1992-1999 – Volumetrics Medical Imaging. CEO and Chairman. Led the development of the first real-time 3D ultrasound imaging system. Now the Standard of Care for many conditions. Millions of patient studies using these systems are done per day.
- 1999 – Present. Entrepreneur in Residence, Venture Partner and General Partner of Sevin Rosen Funds a venture capital firm with over \$1Bn under management. While in these roles at Sevin Rosen I started 2 companies as the CEO and led our investment in another 12 companies, served on their boards of directors and on board committees. These companies included Luxtera, the leader in Silicon Photonics, Ethertronics, the leader in antennas for cell phones and Metabolon the originator and leader in the science of Metabolomics.
- 2016 – 2018 Founder and CEO of Element Genomics, a gene editing company focused on Epigenetic modifications to cure common diseases.

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:

I have served on numerous not-for-profit boards including the Board of Visitors for Duke’s Engineering school, Board of Trustees at Grace Cathedral in San Francisco, and The Caring House in Durham North Carolina

- How were you recruited to join this Board of Directors? I am the founding board member of Carolina Achieve. I was recruited by my wife who believes that our area schools must improve and that my life’s journey is incomplete unless I can pass on the skills that I have amassed to the next generation; particularly to those who are most under served by our current school system.

When considering this mission, I was saddened to learn about the poor results in math and reading proficiency tests at the high school level in our area. To understand what proficiency means, I took the test. Fortunately, being a life-long engineer, I passed it without much difficulty.

However, I had three big realizations about what the test means.

The first realization is that if one can pass the test, they are numerate. I.e., they can reason about numbers. In my profession, I use the math embodied by lots of the questions on the test all the time. While passing the test does not mean that a student can instantly become an engineer, it does mean that the student possesses the tools to travel that path. Similarly, many trades such as carpentry rely on basic math.

The second realization, was that I know that I can teach all of the math required for numeracy without much difficulty – our society should be able to teach basic math to all students. I grew up in a poor area of West Virginia in the 50’s and 60’s. We learned this same math (except for the statistics portions) at that time in that place. Children today are not any worse or do not come from more challenging situations than we did. Something else is wrong.

The third realization is that if one does not pass the test they cannot participate in the blossoming economy of the Triangle area. Those jobs will go to people from out of state who move here for opportunity. This is unacceptable and the reason that I told my wife that I would work on it.

- Our mission is rigorous training in the educational basics of reading, writing and arithmetic. Upon that foundation we want to teach children the basics of entrepreneurship. This will give the education a focus beyond answering the questions at the end of the chapter. Students will also learn to talk with customers, convince others to invest their time and treasure into their idea, lead groups, follow other leaders, persist in the face of adversity, if necessary, fail forward, break large problems into small executable pieces, learn on their own and to take initiative.
- What is your understanding of the appropriate role of a public charter school board member?
 - Provide governance and oversight. Assure school is meeting its mission.
- i. 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.

As discussed above, I have been on the boards of lots of companies, big and small. I am asked to be on additional boards regularly. I already am an effective board member of for profit and non profit organizations.

- ii. Describe the specific knowledge and experience that you would bring to the board.

I've been doing this for 30 years or so. I have been the Chairman of the Board, Chairman of the Audit Committee with Big 4 accounting firms, Chairman of the Compensation Committee, and Chairman of the Nominating and Governance Committee. At Grace Cathedrael I was on the Finance committee who oversaw our \$6M per year budget. I also was Chairman of our \$30M Endowment. In that roll, I completely restructured our investment approach from a reliance on advisors to a drive to get the market rate of return with minimum expense.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

I describe our mission above. Our guiding belief is that all students have a set of abilities necessary to succeed. It is our job to help them achieve big goals in life so that they don't have to settle.

2. What is your understanding of the school's proposed educational program?

- I've worked with our head of school, Tiffinay Alrefae on this. The school will have a strong academic foundation in core subjects with an overlay of entrepreneurial skills throughout the program. We will be partnering with Uncharted Learning – an entrepreneurial curriculum that will ensure we will meet our goals. We will also work with District C to develop entrepreneurial projects for our students.

3. What do you believe to be the characteristics of a successful school?

Generally, Parents want to send their children there. Graduated students succeed in life. Student mis behavior is low. Students have a high rate of college entrance/graduation or go on to get high quality certifications.

4. How will you know that the school is succeeding (or not) in its mission?

Students score well on standardized tests. Our waiting list grows. Student referrals for discipline are low not because we overlook bad behavior but because they are self confident, we expect them to behave and in turn they are respected. Parents are engaged and help us with various school activities. We are able to raise money for endowment and enrichment projects. Our student population reflects the population of Durham/Orange Counties. Ultimately, we want to see that our students go onto higher education or get great jobs so that we can celebrate the realization of their promise with them.

Governance

1. Describe the role that the board will play in the school's operation.

I wrote the governance section of the application. It says, basically, that the board will provide oversight of all operations of the school. Therefore, we need individuals who have the personal experience to do this. I have broken up all of the operations of the school and listed all of the qualifications necessary to oversee these activities. I think we have the skills necessary to oversee all operations on our board. These skills are not resident in any one person but in the group as a whole.

Secondly, the board will be a venue for the staff to show-off their qualifications and expertise. We will constantly have staff reports so that we can assess their abilities to do their jobs.

Finally, the board will review the major initiatives of the staff and either approve them or not.

2. How will you know if the school is successful at the end of the first year of operation?

- The school has low attrition for teachers and students. Tests will be taken at the beginning and end of the year. Significant improvement on these tests is a strong indication of performance. The school will have healthy enrollment trends.
3. How will you know at the end of five years of the schools is successful?
- The school will be at full enrollment with a strong waiting list of potential students. We have an outstanding, diverse faculty. The school will be accredited by Advanced Ed. The Charter will be renewed.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
- Active oversight and effective governance.
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?
- These are unfortunate situations. The board would address the situation directly and resolve any issues as quickly as possible.

*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, John Oxaal, 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 Carolina Achieve Charter School is true and correct in every respect.

Signature *John Oxaal*
 Date April 22, 2023

1-Page Resume for
John Oxaal

Education:

- 1976 - BS in Biomedical Engineering at Duke University
- 1976 – 1980: Biomedical Engineer at Duke University Medical Center working on Development of World's first Phased Array Ultrasound Machine.
- 1980-1981: MBA at University of Chicago specializing in Economics and Finance

Work Experience:

- 1981 – 1985: Analog Devices, a semiconductor company: Product Marketing Manager and co-Founder of the Digital Signal Processing Division. The DSP Division became a Billion dollar division of Analog Devices
- 1985 – 1989: Weitek: Product Marketing Manager for the first out sourced semiconductor company. Led the development of many Weitek products eventually culminating in an IPO in 1988.
- 1989-1991 OPTA – Vice President of marketing and sales for the first digital still camera developer.
- 1992-1999 – Volumetrics Medical Imaging. CEO and Chairman. Led the development of the first real-time 3D ultrasound imaging system. Now the Standard of Care for many conditions. Millions of patient studies using these systems are done per day.
- 1999 – Present. Entrepreneur in Residence, Venture Partner and General Partner of Sevin Rosen Funds a venture capital firm with over \$1Bn under management. While in these roles at Sevin Rosen I started 2 companies as the CEO and led our investment in another 12 companies, served on their boards of directors and on board committees. These companies included Luxtera, the leader in Silicon Photonics, Ethertronics, the leader in antennas for cell phones and Metabolon the originator and leader in the science of Metabolomics.
- 2016 – 2018 Founder and CEO of Element Genomics, a gene editing company focused on Epigenetic modifications to cure common diseases. Sold to a large pharma company, UCB

Charter School Board Member Information Form

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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.

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Background

1. Name of a charter school on whose Board of Directors you intend to serve: Carolina Achieve

2. Full name: MaKayla Booker

Home Address: 207 West Geer Street Durham, NC 27701

Business Name and Address: Wall Street Juniors Inc. 207 West Geer Street Durham, NC 27701

Telephone No.: 919-423-4073

E-mail address: makayla.booker@wallstreetjr.org

3. Brief educational and employment history.

- Please see my resume attached.

1. 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:

2. 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 originally invited by another Board member, Tiffany Alrefae after being recommended by a community partner. Serving as a Board member is important to me

because it allows me to serve as a leader and key executive in advocating for effective and equitable learning environments in Durham, NC.

1. What is your understanding of the appropriate role of a public charter school board member?
 - I recently served on a community co-design team for another school and learned the importance of the leadership roles of a public charter school. I've also served as a Board member for a local nonprofit organization for 5 years. With this experience and knowledge, I've learned about the role and responsibilities of a Board member.

1. 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.
 - In the past, I've served as a member of a Community Co-design team for an emerging charter school in Georgia. I've also served as a Board Chair for a Nonprofit Organization founded in Durham, NC for 4 years. During my time with both organizations, I had the opportunity to learn more about board leadership, team management, and design, organizational behavior management, understanding budgets for small and large organizations, and communication. With this experience, I am confident that I will have the capability to serve with Carolina Achieve Charter School.

1. Describe the specific knowledge and experience that you would bring to the board.
 - The specific knowledge, skills, and experience I would bring to this board are organizational behavior management, strategic planning, curriculum design, experience working with exceptional students, IEP and behavioral treatment plan development, grant writing, business management, and training and development skills. In the past, I've served in many various capacities with other organizations and schools. I have 10 years of experience in education, and over 7 years of experience in business development, and entrepreneurship.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
 - Carolina Achieve believes that all children should have the skills and knowledge needed to be community problem solvers, innovative learners, and future leaders of America. Our mission is to create an equitable learning environment that establishes a positive relationship with social and emotional learning to develop critical and creative thinkers who are prepared to achieve their academic, personal, and professional goals in education and life.

2. What is your understanding of the school's proposed educational program?
 - My general understanding pertaining to the school's proposed educational program is a robust learning design that includes a learning-centered curriculum that involves

problem-solving, competency and skill-based learning, entrepreneurial skills and education, and exposure to financial literacy at an early age.

3. What do you believe to be the characteristics of a successful school?
 - The characteristics of a successful school are integrity, trust, community-driven, and safety.
4. How will you know that the school is succeeding (or not) in its mission?
 - Carolina Achieve will record data collection for students, families, and staff satisfaction to understand the needs and progress of the community we are serving. Our Board Members will meet frequently to discuss the performance levels and overall goals for the school. The school will know that it is succeeding with high-performing test scores above county standards, consistent community and parent/family engagement, and increasing student enrollment rates overall.

Governance

1. Describe the role that the board will play in the school's operation.
 - The Board Members will meet on a consistent basis to discuss the school's organization, operation, future plans, and community affiliations. It is in the best interest of the Board Members to create a strong foundation for the school. The Board members will provide the strategic vision for the schools, maintain accountability for academic success, and provide overall financial insight.
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, we intend to have positive enrollment numbers, strong relationships with community partners and surrounding neighborhoods, above-average results for academic performance, and effective and trustful relationships with parents and guardians of the school.
3. How will you know at the end of five years of the schools is successful?
 - Within the next five years, the school is expected to be in full operation while making academic and community strides for students, families, and neighborhoods. By this time the school's goal is to be at full capacity with a waiting list for student enrollment, have a diverse learning environment, be accredited by Advanced Ed., and have our Charter renewed.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
 - The Board members must practice effective governance and maintain positive relationships in the communities for the well-being of the school.
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?

- This information would be addressed and acknowledged by the board to resolve any issues, complaints, and/or concerns directly related to the school.

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- a one page resume

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Certification

I, MaKayla Booker, 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 Carolina Achieve Charter School is true and correct in every respect.

MaKayla Booker
Signature

4/21/2023

Date



MAKAYLA BOOKER

PERSONAL PROFILE

Passionate about assisting others with managing and establishing a stronger relationship between finances and community development. Over 7 years of experience in education and nearly 5 years of project management.

WORK EXPERIENCE

Project Manager

The City of Durham, Neighborhood Improvement Services Department. | February - present

- Manage and provide operational direction for the Community Partner Development Course Certification program that meet the identified program goals and objectives
- Lead regular planning meetings with NCCU staff and Community Cofacilitator and maintain documentation of project progress

Executive Director

Wall Street Juniors Inc. | November 2018 - present

- Conduct day-to-day project coordination, planning, and implementation across multiple teams.
- Create functional and technical application documents and programming.
- Establish and maintain strong partnerships and affiliations to provide community resources.

Supervisor/Organizer Trainee

Donohoe | November 2020 - December 2020

- Assisted with collecting data for tracking and reporting conversations daily in a database system
- Trained canvassers on how to use a tablet/phone to track and submit data
- Supervised a team of hourly canvassers and team leaders

Curriculum/Program Coordinator Internship

Russell Memorial CME Church | April 2019 - December 2019

- Managed complex projects from start to finish
- Collaborated with other community leaders to coordinate programming for congregation and ECE students.
- Prepared curriculum geared towards financial literacy education for various programs.

EDUCATIONAL HISTORY

Saint Joseph's University

Masters in Applied Behavior Analysis | Jan 2020 - Dec 2021

- GPA: 3.79
- Studying the science of behavior based on environments.
- Collecting data and evaluating results based on applied behavior analysis
- Conducting assessments to develop treatment plans and goals.

Georgia State University

BIS in Human Learning & Development | May 2016 - May 2019

- GPA: 3.8
- Minor in Spanish

CONTACT ME AT

📍 Office Address: Durham, NC | Atlanta, GA

✉️ makayla.booker@wallstreetjr.org

💻 www.wallstreetjr.org

SKILLS SUMMARY

●●●● Project Management

●●●● Software Development

●●●● Budgeting and Cost Analysis

●●●● Enterprise Resource Planning

●●●● Staff and User Training

●●●● Process Improvement

●●●● Curriculum Development

●●●● Teaching & Instruction

CERTIFICATES

📖 Certified Financial Planner
Module 1/General Principles
(2022)

📖 Organizational Behavior
Management, Florida Institute
of Technology (2021)

📖 Tax Preparer, Jackson Hewitt
(2019)

📖 Transformational Investing,
Phil Towns (2018)

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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:

2. Full name: Banks Jefferson Clark

Home Address: 2500 Auburn Street, Durham, NC 27705

Business Name and Address: BJC Consulting, LLC 2500 Auburn Street, Durham, NC 27705

Telephone No.: 919-949-4144 (cell)

E-mail address: bjeffersonclark@gmail.com

3. Brief educational and employment history.

- **1978** - BSME Duke University, **1984** - MBA, Duke University
- **1978-1980** – Diversified Engineering – Exec VP. Worked as a design and field engineer in HVAC, Plumbing and Electrical systems.
- **1981-1994** – Various External Affairs Positions – Duke University
 - a) Assistant Dean - Duke Pratt School of Engineering
 - b) Associate Director and Director of External Affairs – Duke Cancer Center
 - c) Executive Director of Development and Alumni Affairs – Duke Medical Center
- **1994 – Present** – Co-Founder and Managing Director, Aurora Funds. Led the life science investment team at Aurora focused on biotechnology, medical devices, diagnostics, healthcare services and healthcare information technology investments.
- **2010 – 2021** - Co-Founder and Board Chair – Veritas Collaborative (a specialty hospital system for the treatment of eating disorders). Veritas merged with The Emily Program early in 2021 to form Accanto Health.

- **2017-2022** - Co-Founder and Board Chair, Matchwell (a tech enabled marketplace that directly and transparently brings healthcare organizations and clinicians together for work). The company was sold to Medical Solutions in the summer of 2022.
- **2021 – Present** - Board Chair at Quinsite, building the leading healthcare analytics company focused on physician practices.
- **2022 – Present** – President and CEO of LadeRx, a development stage biotechnology company focused on creating safer, more effective MRI contrast agents and MRI-guided therapies.
- **2022 – Present** - Senior Advisor and Venture Partner for Oval Park Capital.

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:

I have served on numerous not-for-profit boards including visiting boards at local Universities and on the boards of regional entrepreneurial organizations and not-for-profits. Service includes:

- Past Chairman of the Board of NC's Council for Entrepreneurial Development (CED),
 - Past Chairman of the Board of Directors for TROSA (Triangle Residential Options for Substance Abusers) where I served as a board member and member of the Executive Committee for 16 years and,
 - Board/Executive Committee member at Caring House - providing patients at Duke Cancer Institute with peace of mind by providing affordable housing, a healing environment, and a positive and supportive community.
- How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?
 - Recruited by John Oxaal – a long-time friend and business colleague
 - I strongly believe in the mission of Carolina Aspire. It will serve a population that looks like the population of Orange and Durham counties and will teach the principals of entrepreneurship. I have been a leader in our local entrepreneurial community for almost 30 years and feel that our community needs this educational resource to better prepare students to join our community.
 - What is your understanding of the appropriate role of a public charter school board member?
 - Provide governance and oversight. Assure school is meeting its mission.

- i. 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.
 - As outlined above, I have extensive experience serving on both for-profit and not-for-profit boards. While at Veritas Collaborative, we collaborated with Durham Public Schools and Duke Hospital to establish a school for our patients who were in longer term care. I have also been part of many fund raising initiatives, often as co-chair of campaigns and/or chair of the development committee of the board.
- ii. Describe the specific knowledge and experience that you would bring to the board.
 - See above. Over 30 years of working on numerous for profit and not-for-profit boards.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
 - The school will prepare students to be creative and critical thinkers. Students will be active and contributing members of the school community through the acquisition and application of entrepreneurial skills. These are the habits of success that students need to succeed both today and in the future.
2. What is your understanding of the school's proposed educational program?
 - The school will have a strong academic foundation in core subjects with an overlay of entrepreneurial skills throughout the program. We will be partnering with Uncharted Learning – an entrepreneurial curriculum that will ensure we will meet our goals.
3. What do you believe to be the characteristics of a successful school?
 - Students and parents are actively engaged. Student academic growth and achievement improves year over year. Students and teachers and families collaborate to build a supportive community that attracts others who want to join.
4. How will you know that the school is succeeding (or not) in its mission?
 - Strong enrollment and eventually a wait-list. Strong academic performance including exceeding the county standardized test scores. A mutually supportive community that encourages student growth. Participating in external evaluations from the State and other

educational organizations. Eventually, we would like to get accreditation from Advanced Ed.

Governance

1. Describe the role that the board will play in the school's operation.
 - Each Board member brings expertise to address all important areas of oversight.

2. How will you know if the school is successful at the end of the first year of operation?
 - The school has low attrition for teachers and students. Academic performance is strong including performance on standardized tests. The school will have healthy enrollment trends.

3. How will you know at the end of five years of the schools is successful?
 - The school will be at full enrollment with a strong waiting list of potential students. We have an outstanding, diverse faculty. The school will be accredited by Advanced Ed. The Charter will be renewed.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
 - Active oversight and effective governance.

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 would address the situation directly and resolve any issues as quickly as possible.

*Please include the following with your Information Form

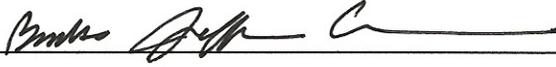
- a one page resume

*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, BANKS JEFFERSON CLARK, 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 CAROLINA ACHIEVE Charter School is true and correct
in every respect.



Signature

Date

3/22/23

1-Page Resume for
Banks Jefferson Clark

Education

- 1978 - BSME Duke University, 1984 - MBA, Duke University

Early Career

- 1978-1980 – Diversified Engineering – Exec VP. Worked as a design and field engineer in HVAC, Plumbing and Electrical design.

Duke University and Duke University Medical Center

- 1981-1994 – Various External Affairs Positions – Duke University
 - a) Assistant Dean - Duke Pratt School of Engineering
 - b) Associate Director and Director of External Affairs – Duke Cancer Center
 - c) Executive Director of Development and Alumni Affairs – Duke Medical Center

Venture Career

- **1994 – Present** – Co-Founder and Managing Director, Aurora Funds. Led the life science investment team at Aurora focused on biotechnology, medical devices, diagnostics, healthcare services and healthcare information technology investments.
- **2010 – 2021** - Co-Founder and Board Chair – Veritas Collaborative (a specialty hospital system for the treatment of eating disorders). Veritas merged with The Emily Program early in 2021 to form Accanto Health.
- **2017-2022** - Co-Founder and Board Chair, Matchwell (a tech enabled marketplace that directly and transparently brings healthcare organizations and clinicians together for work). The company was sold to Medical Solutions in the summer of 2022.
- **2021 – Present** - Board Chair at Quinsite, building the leading healthcare analytics company focused on physician practices.
- **2022 – Present** – President and CEO of LadeRx, a development stage biotechnology company focused on creating safer, more effective MRI contrast agents and MRI-guided therapies.
- **2022 – Present** - Senior Advisor and Venture Partner for Oval Park Capital.

Non Profit Positions

Chairman of the Board – North Carolina’s Council for Entrepreneurial Development (CED)
Chairman of the Board and Board Member serving for 16 years – TROSA (Triangle Residential Options for Substance Abusers)
Board Member/Executive Committee – Caring House

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:

2. Full name: Dwayne Olando Constantine Campbell

Home Address: 1107m Talbot Place, Durham, NC 27703

Telephone No.: 774-365-7941 (cell)

E-mail address: dwayneoccampbell@gmail.com

3. Brief educational and employment history.

Educational

- 1999-2002 – BA (International Relations and English), University of the West Indies
- 2006- 2009 – MAs (Curriculum & Instruction, Educational Administration, and Applied, Development and Educational Psychology), Boston College
- 2009-2016 Doctorate in Program Evaluation, University of Rochester

Employment

- 2002-2006 – St. George's College
 - a) Teacher - English
 - b) Dean of the Graduating Class
- 2006-2009- Practicum Supervisor, Boston College
- 2009-2016- Research Assistant, University of Rochester
- May-November 2016 Director of Research, Analytics & Evaluation
- November 2016-March 2018, Lead Evaluator, UNC at Chapel Hill
- August 2018-July 2021- Director of Postsecondary Access, Emily K Center

- April 2021-April 2023- Executive Fellow, Fuse Corps (City of Durham)
- October 2022-April 2023- Evaluation Consultant, ASI Government (NC Department of Health's Division Child Development and Early Education)
- April 2023- Present- Program Evaluator, US Department of Homeland Security

Have you previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation?

Yes: No:

- How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?
 - Recruited by Anjeanette Mille – a professional colleague and present board member.
 - I am deeply passionate about education, access to education, and contributing to building a future that is inspired by students who have been given the best educational opportunities. Presently, many of the schools in Durham (where I live) need a lot more support from the local, state and federal government, and also far more support from ordinary citizens (including myself). My present opportunities come from the privilege of having a great education and opportunities that came from these. I want the same for other young men and women.
- What is your understanding of the appropriate role of a public charter school board member?
 - Ensure accountability with regard to school meeting fulfilling its goals and mission, while ensuring that public funds are appropriately being used to advance the educational and overall achievement of enrolled students.
- i. 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.

My professional background in education and evaluation makes me very suitable for this role. I know what good education looks like, and am very competent at assessing students and organizations.

- ii. Describe the specific knowledge and experience that you would bring to the board.
 - Education leadership, curriculum and instruction, classroom assessment, testing and measurement, monitoring and evaluation.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
 - This charter school will build innovators leaders who are creative citizens who will contribute meaningfully to their own lives, while advancing their community. This will occur with teachers who use culturally responsive pedagogy with high standards, and with school leaders who lead with sensitivity and support for their charge.
2. What is your understanding of the school's proposed educational program?
 - "Innovation and entrepreneurship for better self and society" sums-up my views of the program.
3. What do you believe to be the characteristics of a successful school?
 - A school system that supports students and their families (regardless of their demographic background), supportive leaders who inspire both their students and teachers, an inclusive community that values the voice and presence of all stakeholders (including support staff), a curriculum that is applicable and can be applied by students.
4. How will you know that the school is succeeding (or not) in its mission?
 - Ongoing formative and annual summative evaluations that assess school leadership, students' aggregate scores, teachers, and the goals set by the board. Assessing will not only be focused on individuals, but also the system and how the system can better support everyone. When everyone feels safe (physically, emotionally and socially), and all stakeholders want to continue their attendance and involvement, we will know the school is succeeding.

Governance

1. Describe the role that the board will play in the school's operation.
 - The Board will provide oversight.
2. How will you know if the school is successful at the end of the first year of operation?
 - When there is very little or no attrition from the school (students and staff), and an increase in application for enrolment.

3. How will you know at the end of five years of the schools is successful?
 - Very little or no attrition (except for students who are graduating), high graduation rates, high success rates for any testing and measurement for students, increased application for admissions.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
 - Active oversight and effective governance.
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?
 - Report the matter to the Board Chair/Assistant Chair for a decision to be made on how to address the matter legally and appropriately.

*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, Dwayne Campbell, 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 Durham Aspire Charter School is true and correct in every respect.

D. Campbell

Signature

Date

CAREER OBJECTIVE

Experienced leader with 20 years' experience in community impact, safety & wellness, education, evaluation, and research seeking opportunities to advance sustainable transformational change through partnerships.

EDUCATION

University of Rochester

Rochester, NY

Doctorate in Education (Program Evaluation), May 2016

Boston College

Chestnut Hill, MA

Master's in Education (Applied, Developmental & Educational Psychology), DNC

Master's in Education

(Administration), May 2008

Master's in Education (Curriculum & Instruction), May 2007

University of the West Indies

Bachelor of Arts (Government & English), June 2002

Dwayne Campbell

dwayneoccampbell@gmail.com; (774) 365-7941

1107 Talbot Place, Durham, NC 27703

EXPERIENCE

EXECUTIVE FELLOW

Fuse Corps assigned to the City of Durham, NC / April 2021 to Present

- Manage Evaluation, Community Engagement, and Grants in the Community Safety Department.
- Manage Durham's Community Safety and Wellness Task Force.
- Conduct research on alternative crisis response.
- Develop pilots and evaluation plans for alternative responses to 911.

DIRECTOR OF POSTSECONDARY ACCESS

Emily Krzyzewski Center, Durham, NC / July 2018 to July 2021

- Led the *Game Plan: College (GPC)* program and staff, as we served over 2,000 of Durham's students.
- Provided college access support to Durham Public School's students, especially those who are Students of Color, First Generation College Students, and/or from families with modest earnings.

LEAD EVALUATOR

Center for Health Promotion & Disease Prevention, Chapel Hill, NC / November 2016 to May 2018

- Led the Supplemental Nutrition Assistance Program Education (SNAP-Ed) federal grant's program evaluation efforts.
- Developed tools and methods to improve data collection, analysis, use, capacity building in SNAP-Ed, and evaluation research.
- Wrote and submitted manuscripts for presentation and publication.

DIRECTOR OF RESEARCH, ANALYTICS & EVALUATION

United Way of the Greater Triangle, Morrisville, NC – 06/16 to 11/16

- Led all evaluate efforts for UWGT's investment in nearly 200 agencies across 4 counties in North Carolina.
- Evaluated collaboratives' grant proposals to address hunger, poverty, low academic achievement, and homelessness challenges among economically disadvantaged groups.

PRACTICUM SUPERVISOR

Boston College, Chestnut Hill / 08/2006- 05/2009

- Directed teaching practicum for over 60 preservice teachers.
- Coached teachers to improve their instruction and assessment.
- Liaised between Boston College and local Massachusetts schools.

DEAN OF STUDENTS & Teacher

St. George's College, Jamaica / August 2004 to August 2006

- Recruited, trained and assessed educational staff
- Ensured effective implementation and delivery of curriculum.

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

Carolina Achieve



BYLAWS OF
Carolina Achieve, INC.
A Charitable Nonprofit Corporation

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BYLAWS OF
CAROLINA ACHIEVE, INC.
A Charitable Nonprofit Corporation

ARTICLE I

NAME, PURPOSES, AND OFFICE

SECTION 1 - NAME. This corporation shall be known as Carolina Achieve, Inc. (“Corporation”).

SECTION 2 - GENERAL PURPOSES. This Corporation is a nonprofit corporation and is not organized for the private gain of any person. It is organized under the North Carolina Nonprofit Corporation Act for charitable and educational purposes. The purposes for which this Corporation is organized and shall be exclusively operated are charitable and educational within the meaning of §501(c)(3) of the Internal Revenue Code of 1986, as amended (“Code”), or the corresponding provision of any subsequent federal tax laws.

Notwithstanding any other provision of these Bylaws, this Corporation shall not, except to an insubstantial degree, carry on or engage in any activities or exercise any powers that are not in furtherance of the purposes of this Corporation.

The Corporation is authorized to conduct any transaction by electronic means, in accordance with N.C. General Statutes §§55A-1-70 and 66-311 et seq.

SECTION 3 - SPECIFIC PURPOSES. Within the context of the foregoing general purposes, the specific and primary purposes for which the Corporation is organized and shall be exclusively operated are as follows:

A. To establish and govern charter schools under North Carolina Charter School legislation and to pursue the advancement of education; and

B. To engage in any and all lawful activities incidental to the foregoing purposes except as restricted herein.

SECTION 4 - LIMITATIONS.

A. **Legislative and Political Activity.** No substantial part of the activities of this Corporation shall consist of carrying on propaganda or otherwise attempting to influence legislation, and this Corporation shall not participate in or intervene in (including the publishing or distributing of statements in connection with) any political campaign on behalf of or in opposition to any candidate for public office.

B. **Property.** The property, assets, profits, and net income of this Corporation are dedicated irrevocably to the purposes set forth in Sections 2 and 3 above. No part of the profits or net earnings of this Corporation shall ever inure to the benefit of any of its directors or officers, or to the benefit of any private individual.

C. **Dissolution.** Upon the dissolution and liquidation of the Corporation, the Board of Directors (“Board”) shall, after paying or making provisions for the payment of all liabilities of the Corporation, distribute all of the assets of the Corporation in the following manner and order:

(1) First, to a nonprofit fund, foundation, or corporation which is organized and operated exclusively for charitable and educational purposes, and which has established its tax-exempt status under §501(c)(3) of the Code or the corresponding provision of any subsequent federal tax laws, as selected by the Board;

(2) Second, as may be determined by a court of competent jurisdiction upon application of the Board for one (1) or more exempt purposes within the

meaning of §501(c)(3) of the Code or the corresponding provision of any subsequent federal tax laws.

Any such assets not so disposed of shall be disposed of by a court of general jurisdiction in the county in which the principal office of the Corporation is then located exclusively for such purposes for which the Corporation was organized or to such organization or organizations as said court shall determine.

D. Limitations in Case of Private Foundation Status. At any time during which this Corporation shall be classified as a “private foundation” as that term is defined by §509 of the Code or the corresponding provision of any subsequent federal tax laws:

(1) the Corporation shall not engage in any act of self-dealing as defined in §4941(d) of the Code or the corresponding provision of any subsequent federal, tax laws;

(2) the Corporation shall make distributions of such amounts for each taxable year at such time and in such manner as not to become subject to the tax imposed by §4942 of the Code or the corresponding provision of any subsequent federal tax laws;

(3) the Corporation shall not retain any excess business holdings as defined in §4943(c) of the Code or the corresponding provision of any subsequent federal tax laws;

(4) the Corporation shall, not make any investments in such manner as to subject it to tax under §4944 of the Code or the corresponding provision of any subsequent federal tax laws; and

(5) the Corporation shall not make any taxable expenditures as defined in §4945(d) of the Code or the corresponding provision of any subsequent federal tax laws.

SECTION 5 - OFFICE. The principal office of the Corporation shall be located at 20 Rountree Lane, Bahama, Durham County, North Carolina 27503. The Corporation also may have offices at such other places as the Board may from time to time designate.

ARTICLE II

NO MEMBERSHIP

The Corporation shall not have members.

ARTICLE III

BOARD OF DIRECTORS

SECTION 1 - COMPOSITION. The power and authority of the Corporation shall be vested in its Board which shall be composed of between five (5) and eleven (11) persons. The number of Board members will be set annually by the Board in its discretion.

SECTION 2 - ELECTION AND TERM OF DIRECTORS. The initial Board shall consist of those persons named in the Articles of Incorporation. The initial Board shall be divided into three (3) groups as nearly equal in number as possible. The directors in Group 1 shall serve an initial term of one (1) year, the directors named in Group 2 shall serve an initial term of two (2) years, and the directors named in Group 3 shall serve an initial term of three (3) years each. Thereafter, all directors shall serve terms of three (3) years each. Directors whose terms have expired shall be eligible to succeed themselves. Directors can serve a maximum of three (3) full three (3) year terms. Board members who have served three (3) full terms can be

granted additional term or terms by a vote of 2/3 of the Board. The Board shall have the power to elect persons to serve as directors to succeed those directors whose terms have expired.

Except for resignations, removals, or death, each director duly nominated and elected shall hold office until his successor is nominated, elected, and qualified by attending a meeting and being duly recognized and placed on the official records of the Corporation by the Secretary.

SECTION 3 - RESIGNATIONS AND REMOVAL. Any director may resign from the Board at any time by giving written notice to the President or the Secretary of the Corporation, and unless otherwise specified therein, acceptance of such resignation shall not be necessary to make it effective. Any director may be removed, with or without cause, by the affirmative vote of a majority of the directors then in office.

SECTION 4 - VACANCIES. Any vacancy occurring on the Board may be filled by the remaining Board members. A director elected to fill a vacancy shall be elected for the unexpired term of his predecessor in office.

SECTION 5 - COMPENSATION. Directors shall serve without compensation except that the directors may, in their discretion and by a majority vote of their number, reimburse any or all directors for expenses actually incurred by them in attending meetings or otherwise carrying out their duties to the Corporation. Nothing herein contained shall be construed to preclude any director from serving the Corporation in any other capacity and receiving compensation therefor.

SECTION 6 - OFFICERS OF THE BOARD OF DIRECTORS.

A. **Chair.** The Board shall, elect from among its members a Chair who shall preside at all meetings of the Board and perform such other duties as may be directed by

the Board. The Chair's term shall be for three (3) years. Upon election for subsequent terms, the Chair may serve successive terms.

B. Vice Chair. The Board may elect from among its members a Vice Chair who shall preside at all meetings of the Board when the Chair is absent. The Vice Chair's term shall be for three (3) years. Upon election for subsequent terms, the Vice Chair may serve successive terms.

ARTICLE IV

MEETINGS OF DIRECTORS

SECTION 1 - PLACE AND TIME OF ANNUAL AND REGULAR MEETINGS.

The Board shall hold not less than one (1) meeting per year at a designated time and place as determined by the Board at its first meeting. The Annual Meeting of the Board shall be held in the month of June of each year. Special meetings of the Board may be held at the call of the Chair or, in the absence of the Chair, the Vice Chair. In addition, special meetings may be called by the vote of at least two-thirds (2/3) of the directors. Regular meetings shall be held six (6) times per year. Special meetings of the Board shall be held upon notice sent by any usual means of communication not less than five (5) days before the meeting.

SECTION 2 - ATTENDANCE. Directors shall strive to attend all meetings. However, in no event shall a director be absent for greater than thirty-five percent (35%) of the meetings of the Board in any year. In the event that a director is absent for greater than thirty-five percent (35%) of the meetings as described herein, the director may be subject to removal from the Board by the affirmative vote of the Board.

SECTION 3 - QUORUM, PROCEDURE, VOTING AND MANNER OF ACTION.

A. **Quorum.** A quorum of the Board for the transaction of business shall consist of a majority of the directors then in office.

B. **Procedure.** At all meetings of the Board, the Chair, or in his absence, the Vice Chair, or in their absence, a presiding officer chosen at the meeting, shall preside over the transaction of business. The Secretary of the Corporation, or his designee, shall act as Secretary and such Secretary or his designee shall prepare records of all meetings of the Board and maintain the same in the Corporation's principal office.

C. **Voting.** Each director is entitled to one (1) vote on any matter before the Board. Voting by proxy is not permitted. A director who is present at a meeting of the Board at which action on any matter is taken shall be presumed to have assented to the action taken unless his contrary vote is recorded or his dissent is otherwise entered in the minutes of the meeting, or unless he files his written dissent to such action with the person acting as the Secretary of the meeting before the adjournment thereof, or forwards such dissent by certified mail, return receipt requested, to the Secretary of the Corporation by the second business day after the adjournment of the meeting. Such right to dissent shall not apply to a director who voted in favor of such action.

D. **Manner of Action.** Unless otherwise required by law, the Articles of Incorporation, or these Bylaws, the act of a majority of the directors present and voting at a meeting at which a quorum is present shall be the act of the Board. Any action required or permitted to be taken by the Board under any provision of law, the Articles of Incorporation, or these Bylaws may be taken without a meeting if written consent to the action in question is signed by all of the directors and filed with the minutes of the proceedings of the Board, whether done before or after the actions so taken. Such action

by written consent shall have the same force and effect as a unanimous vote of the directors.

SECTION 4 - CONFLICTS OF INTEREST.

A. Good Faith. Directors of the Corporation shall exercise good faith in all transactions touching upon their duties to the Corporation and its property. In their dealings with and on behalf of the Corporation, directors are held to a strict rule of honest dealing. In addition to the conflicts of interest provisions hereof, the Company and the Board shall at all times comply with the requirements of Chapter 55A of the General Statutes of the State of North Carolina, as amended from time to time, with respect to conflicts of interest. In addition to the provisions herein related to Conflicts of Interest, the Board shall adopt a code of ethics and whistleblower policy for members of the Board, officers and employees to observe and practice high standards of business and personal ethics in the conduct of their duties and responsibilities.

B. Conflict Raised by Another Member of the Board. Each director, before taking his position, shall disclose in writing to the Chair a list of all businesses or other organizations of which he is an officer, director, shareholder, member, owner or employee, or for which he acts as an agent and with which the Corporation has or might reasonably in the future enter into a relationship or a transaction in which the director would have conflicting interests.

If any matter should come before the Board or any of its committees in such a way to give rise to a conflict of interest, the affected director shall make known to the Board the potential conflict and shall answer any questions that might be asked him. The

Board shall determine whether or not a conflict exists. If the Board determines that a conflict does exist, the affected director shall be excluded from voting.

Any director may raise an issue as to whether or not another director has a conflict of interest with respect to any matter coming before the Board. In such case, the Board shall decide whether or not a conflict exists. If the Board determines that a conflict does exist, the affected director shall be excluded from voting.

The affected director shall be counted in determining the quorum for the meeting except as provided herein. If the material facts of a transaction and the director's interest were disclosed or known to the Board or a committee of the Board and the Board or committee authorized, approved or ratified the transaction, a quorum is present if a majority of the directors who have no direct or indirect interest in the transaction voted to authorize, approve, or ratify the transaction. A majority of votes, whether or not present, that are entitled to be cast in a vote on a transaction where the material facts of the transaction and the director's interest were disclosed or known to the members of the Board entitled to vote constitutes a quorum; the members entitled to vote on such a transaction shall include all directors except (i) those directors with a direct or indirect interest in the transaction and (ii) those directors who have a material financial interest in another entity or are the general partners of another entity which is a party to the transaction. The minutes of the meeting shall reflect the existence of the conflict, the abstention from voting, and the quorum situation.

Any director may raise an issue as to whether another director's circumstances or situation renders his service on the Board in conflict with the best interests of the

Corporation. In any such case, the Board shall determine if such a conflict exists, and what action, if any, should be taken.

Before any immediate family member, as defined in Section 115C-12.2 of the General Statutes of the State of North Carolina, as amended from time to time, of any member of the Board or any Company employee with supervisory authority shall be employed or engaged as an employee, independent contractor, or otherwise by the Board or the Company in any capacity, such proposed employment or engagement shall be (i) disclosed to the Board and (ii) approved by the Board in a duly called, open session meeting.

C. **Disqualified Director.** The foregoing section shall not be construed as preventing a director from briefly stating his position to the Board concerning the manner in which he has a possible conflict of interest or from answering pertinent questions of other directors concerning the matter because his knowledge may be of assistance to the Board.

D. **Notice to New Directors.** The Chair of the Board shall advise each new director of this conflicts of interest policy promptly after the new director assumes the duties of his office.

SECTION 5 - INDEMNIFICATION.

A. **Indemnification Under N.C. Gen. Stat. §55A-8-51.**

(1) Except as provided in subparagraph (4) of this Section 5.A, the Corporation shall indemnify an individual made a party to a proceeding because the individual is or was a director against liability incurred in the proceeding if the individual (a) conducted himself in good faith; (b) reasonably believed (i) in the

case of conduct in his official capacity with the Corporation, that his conduct was in its best interests, and (ii) in all other cases, that his conduct was at least not opposed to the Corporation's best interests; and (c) in the case of any criminal proceeding, had no reasonable cause to believe his conduct was unlawful.

(2) A director's conduct with respect to an employee benefit plan for a purpose the director reasonably believed to be in the interests of the participants in and beneficiaries of the plan is conduct that satisfies the requirement of subparagraph (1) above.

(3) The termination of a proceeding by judgment, order, settlement, conviction or upon a plea of no contest or its equivalent is not of itself determinative that the director did not meet the standard of conduct set forth in subparagraph (1) above.

(4) The Corporation shall not indemnify a director in connection with the proceeding by or in right of the Corporation in which the director is adjudged liable to the Corporation or in connection with any other proceeding charging improper personal benefit to the director, whether or not involving action in his official capacity, in which the director was adjudged liable on the basis that personal benefit was improperly received by the director.

(5) Indemnification hereunder in connection with a proceeding by or in the right of the Corporation that is concluded without a final adjudication on the issue of liability is limited to reasonable expenses incurred in connection with the proceeding.

(6) The authorization, approval or favorable recommendation by the Board of indemnification as authorized hereunder shall not be deemed an act or corporate transaction in which a director has a conflict of interest and no such indemnification shall be void or voidable on such ground.

B. Indemnification under N.C. Gen. Stat. §55A-8-52. The Corporation shall indemnify a director who is wholly successful on the merits or otherwise in the defense of any proceeding to which the director was a party because he is or was a director of the Corporation, against reasonable expenses actually incurred by the director in connection with the proceeding.

C. Advances Under N.C. Gen. Stat. §55A-8-53. Expenses incurred by a director in defending a proceeding shall be paid by the Corporation in advance of the final disposition of the proceeding upon receipt of an agreement by or on behalf of the director to repay such amount unless it is ultimately determined that the director is entitled to be indemnified by the Corporation against such expenses.

D. Court-Ordered Indemnification Under N.C. Gen. Stat. §55A-8-54. A director of the Corporation who is a party to a proceeding may apply for indemnification to the court conducting the proceeding or to another court of competent jurisdiction. The court may order indemnification if it determines that (i) the director is entitled to mandatory indemnification under N.C. Gen. Stat. §55A-8-52, in which case the Corporation shall also pay the director's reasonable expenses incurred to obtain court-ordered indemnification, or (ii) the director is fairly and reasonably entitled to indemnification in whole or in part in view of all the relevant circumstances, whether or not the director met the standard of conduct set forth in N.C. Gen. Stat. §55A-8-51 or was

adjudged liable as described in N.C. Gen. Stat. §55A-8-51(d), but if the director is adjudged so liable, such indemnification is limited to reasonable expenses incurred.

E. Determination and Authorization of Indemnification Under N.C. Gen. Stat. §55A-8-55.

(1) The Corporation shall not indemnify a director under N.C. Gen. Stat. §55A-8-51 unless authorized in the specific case after a determination has been made that indemnification of the director is permissible in the circumstances because the director met the standard of conduct set forth in N.C. Gen. Stat. §55A-8-51. The determination shall be made by the Board by a majority vote of a quorum consisting of directors not at the time parties to the proceeding. If such a quorum cannot be obtained, such determination thereupon shall be made by a majority vote of a committee duly designated by the Board (in which designation directors who are parties may participate), consisting solely of two (2) or more directors not at the time parties to the proceeding. If the foregoing two (2) methods of determination cannot be made, then such determination shall be made by special legal counsel selected by the Board or a committee in the manner prescribed herein, or if a quorum of the Board cannot be obtained and a committee cannot be designated, then selected by a majority vote of the full Board in which selection directors who are parties may participate.

(2) Authorization of indemnification and evaluation as to reasonableness of expenses shall be made in the same manner as the determination that indemnification is permissible, except that if the determination is made by special legal counsel, authorization of indemnification and evaluation

as to reasonableness of expenses shall be made by those entitled to select counsel hereunder.

F. Indemnification of Officers, Employees, and Agents Under N.C. Gen. Stat. §55A-8-56. An officer, employee, or agent of the Corporation is entitled to indemnification under this subsection to the same extent as a director. The Corporation shall advance expenses to an officer, employee, or agent of the Corporation to the same extent as to a director.

G. Immunity from Civil Liability. Directors and officers of the Corporation shall be immune from civil liability for monetary damages arising out of their service as such to the fullest extent authorized by law, including but not limited to that immunity authorized by N.C. Gen. Stat. §§1-539.10, 55A-2-02(b)(4), and 55A-8-60, or any successor provisions of law.

H. Additional Indemnification and Insurance

(1) In addition to the indemnification provided for in this Article IV, Sections 5(A) through 5(G) hereof, the Corporation shall indemnify its directors, officers and employees against liability and expenses in any proceeding, including without limitation a proceeding brought by or on behalf of the Corporation itself, arising out of their status as such or their activities in any of the foregoing capacities. The Corporation shall also indemnify any person who at the request of the Corporation is or was serving as a director, officer, trustee, or employee of another corporation, partnership, joint venture, trust or other enterprise or as a trustee or administrator of an employee benefit plan.

(2) The Corporation may purchase and maintain insurance on behalf of an individual who is or was a director, officer or employee of the Corporation or who, while

a director, officer or employee of the Corporation, is or was serving at the request of the Corporation as a director, officer, trustee or employee of another corporation, joint venture, trust, employee benefit plan or other enterprise, against liability asserted against or incurred by him or her in that capacity or arising from his or her status as a director, officer or employee, whether or not the Corporation would have authority to indemnify him or her against the same liability under any provision of law.

ARTICLE V

COMMITTEES OF THE BOARD OF DIRECTORS

SECTION 1 - EXECUTIVE COMMITTEE.

- A. **Designation.** There may be an Executive Committee of five (5) directors, if authorized by resolution of the Board.
- B. **Meetings.** The Executive Committee may meet at stated times or upon written notice to all members of the Executive Committee.
- C. **Authority.** During intervals between meetings of the Board, and except as limited by resolution of the Board or by law, the Executive Committee shall and may exercise all of the authority of the Board in the management of the Corporation.
- D. **Membership and Vacancies.** The members of the Executive Committee shall at all times include the Chair of the Board of the Corporation and the Vice Chair of the Board of the Corporation. The remaining members of the Executive Committee shall be appointed by the Chair of the Board of the Corporation and the Vice Chair of the Board of the Corporation, and approved by the majority of all directors in, office. Vacancies in the membership of the Executive Committee may but need not be filled by

the Board at any regular meeting or at a special meeting called for that purpose. The membership of the Executive Committee may be changed or the Executive Committee may be dissolved by the Board at any annual meeting or by a special meeting called for that purpose.

E. **Minutes.** The Executive Committee shall keep regular minutes of its proceedings and shall report the same to the Board when requested by the Board.

SECTION 2 - ADVISORY COMMITTEES. The Board may create advisory committees from time to time. The advisory committees shall be appointed by the Chair of the Board and approved by a majority of all directors in office. The advisory committee shall include one (1) or more directors. Advisory committees shall not exercise the authority of the Board and shall serve only in an advisory capacity.

The initial standing committees are: Executive, Audit, Nominating and Governance, Educational Assessment & Student Body Recruitment. Each Board member shall serve on at least on one (1) committee. Membership on the committees is not restricted to Board members except for the Executive Committee and any committee working on personnel issues. Each Committee shall establish a Charter, which must be approved by the Board, by which the Committee shall operate and which describes the duties of such Committee.

SECTION 3 - STANDING AND SPECIAL COMMITTEES. The Board may authorize such standing and special committees as are necessary and proper to carry on the affairs of the Corporation. The resolution of creation must designate the authority of the Board which the committee may exercise, as well as any limitations thereon, and the functions that the committee shall discharge. Members of such standing committees as may be authorized shall be appointed by the Chair of the Board and approved by a majority of all the directors in office.

Only directors of the Corporation may serve as voting members or chair of such special or standing committees as may be authorized.

SECTION 4 - GOVERNING PROVISIONS. Meetings, action without meeting, notice and waiver of notice, and quorum and voting requirements of the Board apply to committees, as well as the members of those committees.

ARTICLE VI

OFFICERS OF THE CORPORATION

SECTION 1 - OFFICERS AND ELECTION. The Board shall elect by majority vote a President, a Vice President, a Secretary and a Treasurer for the term of one (1) year or until their successors have been appointed, each of whom shall take office after the close of the Annual Meeting of the Board at which he is elected as such. The Board may elect such additional officers and assign to such officer(s) such duties or responsibilities as the Board may deem necessary or appropriate. Officers shall be eligible to serve unlimited terms of one (1) year each. Officers may delegate and supervise the performance of their duties as necessary; provided, however, that the delegation and supervision of an officer's duties will not alter the officer's obligation to discharge his duties in good faith, with the care of a reasonably prudent person in a like position under similar circumstances, and in a manner the officer reasonably believes to be in the best interests of the Corporation.

SECTION 2 - PRESIDENT. The President shall serve as the principal officer of the Corporation in the overall management of the business and operation thereof. The President shall act as the duly authorized representative of the Corporation in all matters, except those in which the Board has formally designated some other person or group to act, and he shall have and exercise the authority that may be delegated to him by the Board and these Bylaws.

SECTION 3 - VICE PRESIDENT. The Vice President shall serve in the absence of the President of the Corporation and shall further have such duties and responsibilities as may be assigned to him by the President.

SECTION 4 - SECRETARY. The Secretary or his designee shall have custody of the business records of the Corporation, including the minutes and organizational documents of the Corporation, and shall maintain the same in accordance with the standards established by the Board. The Secretary may sign with the President, in the name of the Board, all contracts, agreements, and other obligations authorized to be executed by the Board. The Secretary shall keep an accurate list of the members of the Board and, in general, shall perform all such acts as may be prescribed by the Board and as are usually incident to the office of Secretary. Assistant Secretaries may be elected by the Board as the Board deems appropriately necessary to assist the Secretary or to assume the duties of the Secretary in the Secretary's absence.

SECTION 5 - TREASURER. The Treasurer or his designee shall: (a) have charge and custody of and be responsible for all funds and securities of the Corporation; receive and give receipts for moneys due and payable to the Corporation from any source whatsoever, and deposit all such moneys in the name of the Corporation in such depositories as shall be selected by the Board; (b) maintain appropriate accounting records as required by law; (c) prepare, or cause to be prepared, annual financial statements of the Corporation that include a balance sheet as of the end of the fiscal year and an income and cash flow statement for that year; and (d) in general perform all of the duties incident to the office of the Treasurer and such other duties as from time to time may be prescribed by the President or the Board.

SECTION 6 - VACANCIES. Vacant offices shall be filled by the act of a majority of directors present at a meeting of the Board at which a quorum is present.

SECTION 7 - REMOVAL OF OFFICERS. Any officer or agent elected or appointed by the Board may be removed by majority vote of the Board when, in the Board's judgment, the best interests of the Corporation will be served thereby.

SECTION 8 - BONDS. The Board may, by resolution, require any officer, agent, or employee of the Corporation to give bond to the Corporation, with sufficient sureties, conditioned on the faithful performance of the duties of his respective office or position and to comply with such other conditions as may from time to time be required by the Board. The premiums for all such bonds shall be paid by the Corporation.

ARTICLE VII

CONTRACTS, LOANS, CHECKS AND DEPOSITS

SECTION 1 - CONTRACTS. The Board may authorize any officer or officers, agent or agents, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation and such authority may be general or confined to specific instances.

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. Such authority may be general or confined to specific instances.

SECTION 3 - CHECKS AND DRAFTS. All checks, drafts, or other orders for the payment of money issued in the name of the Corporation shall be signed by such officer or officers, agent or agents, of the Corporation and in such manner as shall from time to time be determined by resolution of the Board.

SECTION 4 - DEPOSITS. All funds of the Corporation not otherwise employed shall be deposited from time to time to the credit of the Corporation in such depositories as the Board may select.

ARTICLE VIII

GENERAL PROVISIONS

SECTION 1 - WAIVER OF NOTICE. Whenever any notice is required to be given to any director or other person under the provisions of these Bylaws, the Articles of Incorporation, or by applicable law, a waiver thereof in writing signed by the person or persons entitled to such notice, whether before or after the time such notice is due, shall be equivalent to the giving of such notice.

SECTION 2 - SEAL. The seal of the Corporation shall be circular in form and shall bear the words, Carolina Achieve, Inc. and, in the center, “Corporate Seal”.

SECTION 3 - FISCAL YEAR. The fiscal year of the Corporation shall end on the last day of the month of June of each year.

SECTION 4 - AUDITORS. The Board shall employ a certified public accountant to (i) audit the books of the Corporation for each fiscal year of the Corporation and at such other time or times and for such periods as the Board may deem advisable, and (ii) furnish certified reports on such audits.

SECTION 5 - PROHIBITION AGAINST SHARING IN CORPORATE EARNINGS. No officer, director or employee of, or member of a committee of, or person connected with the Corporation, or any other private individual shall receive at any time any of the net earnings or pecuniary profits from the operations of the Corporation, provided that this shall not prevent the payment to any such person of such reasonable compensation for services rendered to or for the Corporation in effecting any of its purposes as shall be fixed by the Board. No such person or persons shall be entitled to share in the distribution of any of the corporate assets upon the dissolution of the Corporation. All directors and officers of the Corporation shall

be deemed to have expressly consented and agreed that upon such dissolution or winding up of the affairs of the Corporation, whether voluntary or involuntary, the assets of the Corporation, after all debts have been satisfied, then remaining in the hands of the Board shall be distributed in such amounts as the Board may determine, or as may be determined by a court of competent jurisdiction upon application of the Board, in the manner set forth in the Articles of Incorporation and these Bylaws.

SECTION 6 - AMENDMENTS. These Bylaws may be amended or repealed and new bylaws may be adopted by the affirmative vote of a majority of the directors then in office at any regular or special meeting of the Board, provided that prior written notice has been given to all members of the Board at least one (1) week in advance of the meeting.

SECTION 7 - GENDER. Throughout these Bylaws, whenever the context requires or permits, the masculine gender shall be deemed to include the feminine, the neuter gender shall be deemed to include the masculine and the feminine, and the singular shall be deemed to include the plural and vice versa.

SECTION 8 – COMPLIANCE WITH CERTAIN NORTH CAROLINA STATUTES. The Company, the Board and the operations in general of the Company will at all times comply with and operate subject to the Public Records Act, Chapter 132 of the General Statutes of the State of North Carolina, as amended from time to time, and the Open Meetings Law, Article 33C of the Chapter 143 of the General Statutes of the State of North Carolina, as amended from time to time. The Board may elect to use Robert’s Rules of Order as a guideline for conducting all meetings. Notwithstanding the requirements of Chapter 132 of the General Statutes of the State of North Carolina, inspection of the Company’s personnel records for those employees directly employed by the Board shall be subject to the requirements and provisions of

Article 21A of Chapter 115C of the General Statutes of the State of North Carolina, as amended from time to time. The Company and the Board shall use the same schedule established by the Department of Natural and Cultural Resources of the State of North Carolina for retention and disposition of records of local school administrative units.

ARTICLE IX

EXEMPT ACTIVITIES

Notwithstanding any other provision of these Bylaws, no director, officer, employee, or other representative of this Corporation shall take any action or carry on any activity by or on behalf of the Corporation not permitted to be taken by either (i) an organization exempt under §501(c)(3) of the Code and the regulations thereunder, as they now exist or as they may hereafter be amended, or (ii) an organization, contributions to which are deductible under §170(c)(2) of the Code and the regulations thereunder, as they now exist or as they may hereafter be amended.

CERTIFICATE OF SECRETARY

I, _____, do hereby certify that I am the duly elected and qualified Secretary of Carolina Achieve, Inc., a nonprofit corporation organized under the laws of the State of North Carolina, and that the foregoing is a true and correct copy of the Bylaws adopted by the Corporation's Board in accordance with law and the Articles of Incorporation of said Corporation.

IN WITNESS WHEREOF, I have affixed my name as Secretary and have caused the corporate seal of said Corporation to be hereunto affixed effective as of the filing of the Articles of Incorporation with the North Carolina Secretary of State.

[CORPORATE SEAL]

CAROLINA ACHIEVE, INC.

Secretary

Appendix K: Articles of Incorporation/Municipal Charter

Carolina Achieve





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

CAROLINA ACHIEVE, INC.

the original of which was filed in this office on the 3rd day of March, 2023.



Scan to verify online.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 3rd day of March, 2023.

Elaine F. Marshall

Secretary of State

SOSID: 2305798
Date Filed: 3/3/2023 1:06:00 PM
Elaine F. Marshall
North Carolina Secretary of State
C2023 055 02569

ARTICLES OF AMENDMENT
TO
ARTICLES OF INCORPORATION
OF
DURHAM ASPIRE ACADEMY, INC.

Pursuant to Section 55A-10-05 of the North Carolina General Statutes, the undersigned non-profit corporation does hereby submit these Articles of Amendment for the purposes of amending its Articles of Incorporation.

1. The name of the non-profit corporation is Durham Aspire Academy, Inc.
2. The Articles of Incorporation are hereby amended as follows:

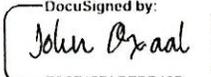
The current text of Item 1 is hereby deleted in its entirety and amended and restated to read as follows:

The name of the corporation is Carolina Achieve, Inc. (hereinafter, the "*Corporation*").

3. The date of adoption of the amendment was February 22, 2023.
4. The amendment was approved by a sufficient vote of the board of directors of the Corporation. Member approval was not required because the Corporation has no members.
5. These Articles of Amendment will be effective upon filing.

This the 22nd day of February 2023.

DURHAM ASPIRE ACADEMY, INC.

By: 
F6C7157A0EFD848B
John Oxaal, Director



NORTH CAROLINA

Department of the Secretary of State

To all whom these presents shall come, Greetings:

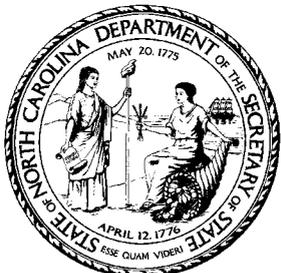
I, ELAINE F. MARSHALL, Secretary of State of the State of North Carolina, do hereby certify the following and hereto attached to be a true copy of

ARTICLES OF INCORPORATION

OF

DURHAM ASPIRE ACADEMY, INC.

the original of which was filed in this office on the 16th day of November, 2021.



Scan to verify online.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 16th day of November, 2021.

Elaine F. Marshall

Secretary of State

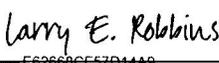
ARTICLES OF INCORPORATION
OF
DURHAM ASPIRE ACADEMY, INC.

Pursuant to Section 55A-2-02 of the North Carolina Nonprofit Corporation Act (the “Act”), the undersigned does hereby submit these Articles of Incorporation for the purposes of forming a nonprofit corporation.

1. The name of the corporation is Durham Aspire Academy, Inc. (hereinafter, the “*Corporation*”).
2. The period of duration of the Corporation is perpetual.
3. The purposes for which the Corporation is organized are exclusively charitable within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (the “*Code*”). The Corporation shall not conduct any activities not permitted to a corporation exempt from federal income tax under Section 501(c)(3) of the Code or to a corporation, contributions to which are deductible under Section 170(c)(2) of the Code.
4. No substantial part of the activities of the Corporation shall be propaganda or otherwise attempting to influence legislation. The Corporation shall not participate in or otherwise intervene in (including publication or distribution of statements) any political campaign on behalf of any candidate for public office.
5. No part of the net earnings of the Corporation shall inure to the benefit of or be distributable to its directors, officers, members or other private persons, except that the Corporation shall be authorized to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes of the Corporation. Upon dissolution of the Corporation, its assets shall, after all liabilities and obligations of the Corporation have been satisfied or after adequate provisions have been made therefor, be distributed to one or more organizations qualified under Section 501(c)(3) of the Code, as chosen by the Corporation’s Board of Directors.
6. The Corporation shall have no members.
7. The Corporation shall indemnify its officers and directors to the maximum extent required or permitted by Article 8, Part 5, of the Act, as from time to time amended. 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 an officer or director of the Corporation with respect to any matter which occurred, or any cause of action, suit or claim which accrued or arose prior to such amendment, appeal or adoption.

8. The street address and mailing address of the Corporation's initial registered office is 20 Rountree Lane, Bahama, Durham County, North Carolina 27503, and the name of the initial registered agent is John Oxaal.
9. The street address and the mailing address of the principal office of the Corporation are the same as the addresses for the initial registered office.
10. The initial director of the Corporation is John Oxaal. He is authorized, without limitation, to appoint additional directors.
11. The name and address of the incorporator is Larry E. Robbins, 4101 Lake Boone Trail, Suite 300, Raleigh, Wake County, North Carolina 27607.
12. These Articles will be effective upon filing.

This the 12th day of November 2021.

DocuSigned by:

E62668CF57D14A9...
Larry E. Robbins, Incorporator

Appendix L: Insurance Quotes

Carolina Achieve



INSURANCE PEOPLE

Fidelity Bond Estimate		\$332
Limit	\$250,000	
Auto Premium Estimate		\$3,450
Three School Busses		
Limit of Liability	\$1,000,000	
Head of Class Endorsement		\$82
Workers Compensation Premium Estimate		\$9,063
Statutory State - NC		
Employers Liability	\$500/ \$500/ \$500	
Payroll Estimate	\$1,530,000	
Umbrella Premium Estimate		\$2,387
Limit of Liability	\$1,000,000	
TOTAL ESTIMATED PREMIUM		\$23,778
Student Accident Coverage		\$7.00/ student

These premiums are subject to change based on Underwriter review and approval of completed applications.

Disclaimer: The abbreviated outlines of coverages used throughout this proposal are not intended to express legal opinion as to the nature of coverage. They are only visuals to a basic understanding of coverages. The policy terms, conditions, and exclusions will prevail. Please read the policy forms for specific details of coverage

03/06/2023

INSURANCE PEOPLE

Below are the estimated annual premiums: Carolina Achieve

Property Premium Estimate

Contents	\$120,000	\$450
Deductible	\$1,000	
Form	Special	
Equipment Breakdown Included		

General Liability Premium Estimate **\$1,737**

Rating Basis:	Students	400
	Faculty	47

Limits:

Per Occurrence Limit	\$1,000,000
Annual Aggregate	\$3,000,000
Sexual Abuse & Molestation	\$1,000,000 per occurrence \$3,000,000 aggregate
Employee Benefits	\$1,000,000 per occurrence \$3,000,000 aggregate

School District & Educators Legal Liability (D&O/ E&O)

Premium Estimate **\$4,277**

	\$1,000,000 per occurrence
	\$2,000,000 aggregate
Additional Defense	\$100,000/\$50,000/\$100,000

Named insured includes the insured Organization (School Entity), it's school board, School Committee, Board of Trustees, Board of Governors or similar governing body, elected or appointed members of the Board of Education, Board of Trustees, School Directors, School Committee, Board of Governors or similar governing board, Employees, Student Teachers, School Volunteers, and students while serving in a supervised internship program sponsored by the "educational institution".

Wrongful Act to include any actual or alleged act, error, omission, misstatement, misleading statement, neglect, or breach of duty by or on behalf of the Insured Organization, including educational malpractice or failure to educate, negligent instruction, failure to supervise, inadequate or negligent academic guidance of counseling, improper or inappropriate academic placement or discipline.

Insurance Estimate for Carolina Achieve

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

Civil Liability and Insurance

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
*Comprehensive General Liability	\$1,000,000		\$1,737
*Officers and Directors/Errors and Omissions	\$1,000,000		\$4,277
*Property Insurance	\$100,000		\$450
*Motor Vehicle Liability	\$1,000,000		\$3,450
*Bonding Minimum/Maximum	\$250,000	\$250,000	\$332
*Other	\$1,000,000		\$13,532
Total Cost			\$23,778

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

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

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

800-825-0442 (Main)

steve@inspeople.com

Appendix O: School Leader's Resume

Carolina Achieve



Tiffany Alrefae

(she/her)

GLOBAL EDUCATOR * COMMUNITY PARTNER * DEI ADVOCATE * WELLNESS PRACTITIONER

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EDUCATION

CERTIFICATE IN SCHOOL

MANAGEMENT- LEADERSHIP

Harvard

Boston, MA

Expected November 2023

PROFESSIONAL CERTIFICATE

SCHOOL FINANCE FOR

NON-BUSINESS LEADERS

NBOA

INTERNATIONAL

PROFESSIONAL CERTIFICATE

EDUCATIONAL LEADERSHIP

Liverpool Hope University

Liverpool, UK

GRADUATE CERTIFICATE

TEACHER LEADERSHIP

Walden University

Minneapolis, MN

MASTER OF SCIENCE

CHILDHOOD TRACK - K - 6

Pace University

New York, NY

MASTER OF SCIENCE

CURRICULUM, INSTRUCTION &

ASSESSMENT

Walden University

Minneapolis, MN

BACHELOR OF ARTS

ART HISTORY

Boston University

Boston, MA

HIGH SCHOOL DIPLOMA

Peddie School

Hightstown, NJ

LEADERSHIP EXPERIENCE

FOUNDING HEAD OF SCHOOL

June 2022 - Present

Carolina Achieve (Charter) / Durham/Orange County, NC

Proposed K - 8 / College Preparatory /900 students

DEAN OF STUDENTS, SCHOOL OPERATIONS, & PROFESSIONAL LEARNING

August 2021 - May 2022

Orlando Science MS & HS School (Charter) / Orlando, FL

6 - 12 / AP - STEM Magnet / 560 students

ASSISTANT HEAD OF SCHOOL

July 2019 – July 2021

DORM PARENT

August 2021 - May 2022

Windermere Preparatory School / Windermere, FL

PK - 12 / AP and IB / 1500 students / Boarding

FOUNDING UPPER SCHOOL PRINCIPAL (6 -12)

July 2017 - June 2019

GEMS American Academy / Qatar

PK - 12 / AP / 1400 students

FOUNDING MIDDLE SCHOOL PRINCIPAL

July 2016 - June 2017

English 8

King Abdullah Academy/ Herndon, VA

PK - 12 / IB and STEM / 900 students

DEAN OF STUDENTS & DEAN OF RESIDENTIAL LIFE

July 2010 - July 2016

Science 8, English 11-12, Ethics 11 - 12

Wilbraham & Monson Academy / Wilbraham, MA

6 - 12/ AP / 500 students / Boarding

FOUNDING FACULTY MEMBER - Social Studies 6 - 9

August 2009 - June 2010

Leman Manhattan Preparatory School / New York, NY

PK - 12/ IB / 600 students

FOUNDING ASSISTANT DEAN OF STUDENTS &

July 2006 - July 2009

DIRECTOR OF RESIDENCE LIFE - English and History 9

King's Academy / Jordan

7 - 12/ AP /500 students / Boarding

FACULTY MEMBER - Math and Science 6

June 2005 - June 2006

NYC TEACHING FELLOW

MS 50 / NY, NY

6-8/Specialized MS/500 students

Area of Proposed Coverage

Comprehensive General Liability

Officers and Directors/Errors and Omissions

Property Insurance

Automobile Liability

Crime Coverage - Minimum/Maximum Amount

Worker's Compensation

Other Coverage

Total Cost

Proposed Amount of Coverage

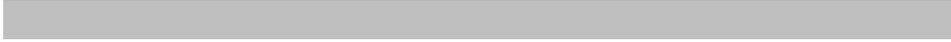
\$1,000,000.00/occurrence

\$1,000,000.00/occurrence

\$1,000,000.00/occurrence

\$250,000.00 | \$250,000.00

\$500,000.00



Cost (Quote)

1,737
\$4,277
\$450
\$3,450
\$332
\$9,063
\$4,469
23,778



Carolina Achieve

Feasibility Assessment

Overview

Carolina Achieve intends to be a *high-performing, innovative school of choice for elementary and middle school-aged students residing in Orange and Durham Counties, and surrounding communities.

Students will flourish in an academically rigorous setting and will learn about the characteristics of successful entrepreneurship. Carolina Achieve's focus on ***Habits of Success*** -- the skills, mindsets and behaviors that help students achieve their full potential -- will serve as a clear differentiator in our service area.

Equally important are significant competitive circumstances that are present in the vicinity of our proposed location at the intersection of Lawrence Road and US Highway 70 in Hillsborough.

They include:

- Projected population growth in the region, particularly among school-aged children.
- Ease of access to the school's campus for families from a variety of communities.
- The relative lack of high-performing public alternatives in close proximity to Carolina Achieve.
- The appeal of the school's commitment to providing access, resource and support to nearby underserved students.

*High-performing school means a school that receives an A or B grade by the NC State Report Card while a Low-performing school receives a C, D, or F grade

Cumulative Population Growth, 2020-2030

Population growth in the primary Carolina Achievement service area is projected to be steady and significant for the foreseeable future. A cumulative increase between 2020 and 2030 of over 50,000 people is accomplished through the combined dynamics of migration to the region and organic growth.

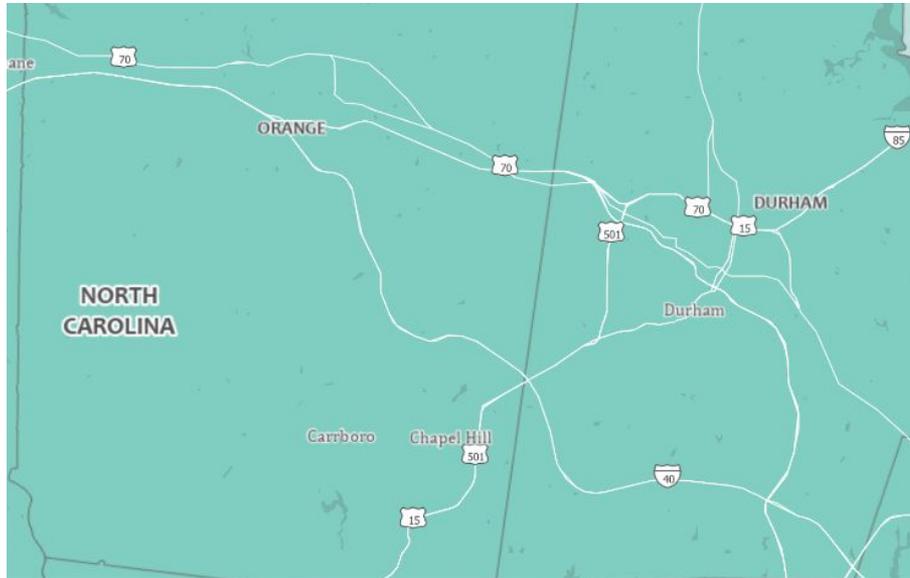
County	July 1, 2020 Population Estimate	July 1, 2030 Population Estimate	Numeric Change	Percent Increase	Net Migration	Natural Increase
Durham	325,573	369,536	43,963	13.5%	26,049	17,914
Orange	148,911	161,272	12,361	8.3%	11,210	1,151

Population Growth Ages 5-14, 2021-2026

County	Age Group	Population Growth Estimate
Durham	5-14	428 students
Orange	5-14	199 students

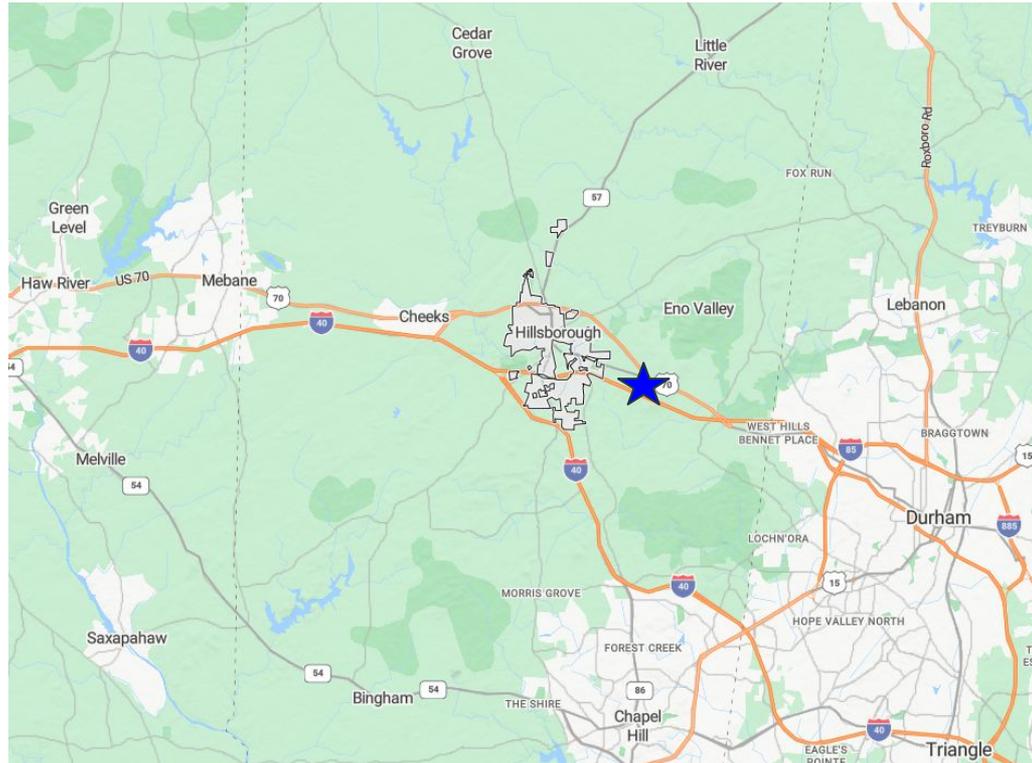
- The total enrollment of all elementary and middle schools within 10 miles of Carolina Achieve's proposed site is 21,760 students.
- The total population of students ages 5-14 in Chapel Hill/Carrboro, Durham, and Orange Counties in the 2021-22 school year totals 52,284 and is projected to grow by 1.2% in the next 5 years.
- In the time frame from 2021 to 2026, student population in the Carolina Achieve demographic is projected to increase by over 600 students in the school's primary service area.

Cumulative Population Growth, 2021-2026



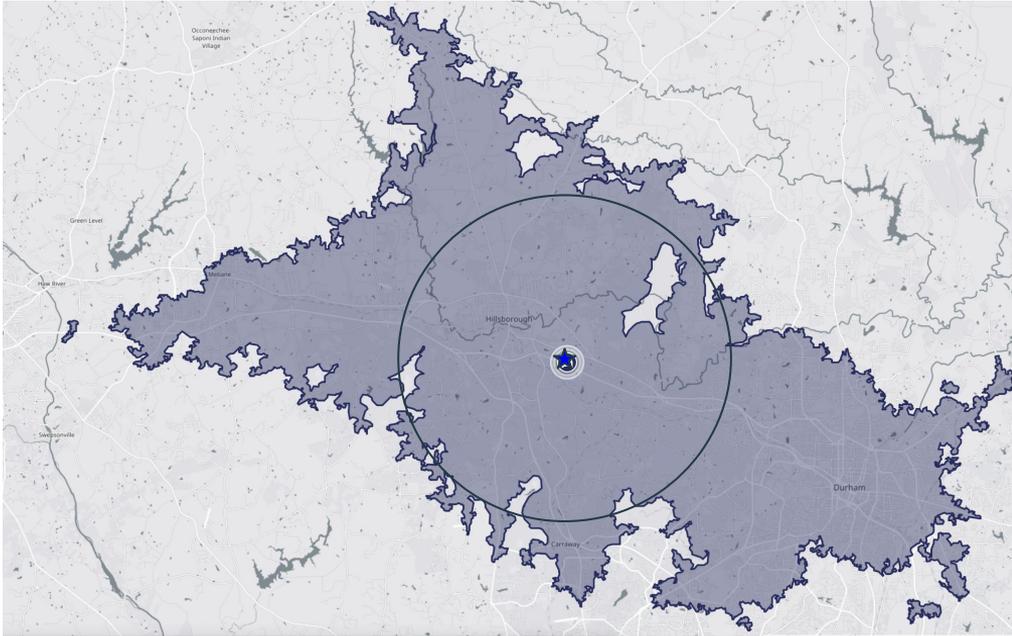
- Population growth All data indicate a scarcity of high-quality elementary and middle school seats in the very near future.

Ease of Access to Carolina Achieve



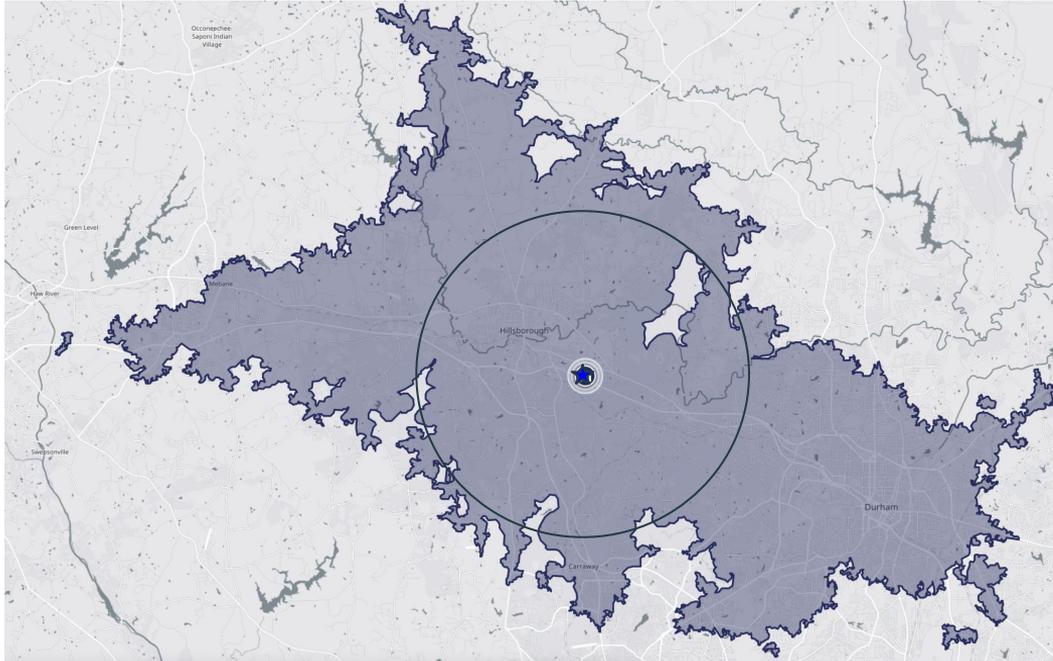
- The proposed location of Carolina Achieve is conveniently located, with close proximity to several well-traveled highways and local thoroughfares.
- Families can utilize I-85, I-40, US Highway 70, Business US Highway 70, NC Highways 86 and 57 to access the school in a short amount of time.

30 Minute Morning Drive Time Radius



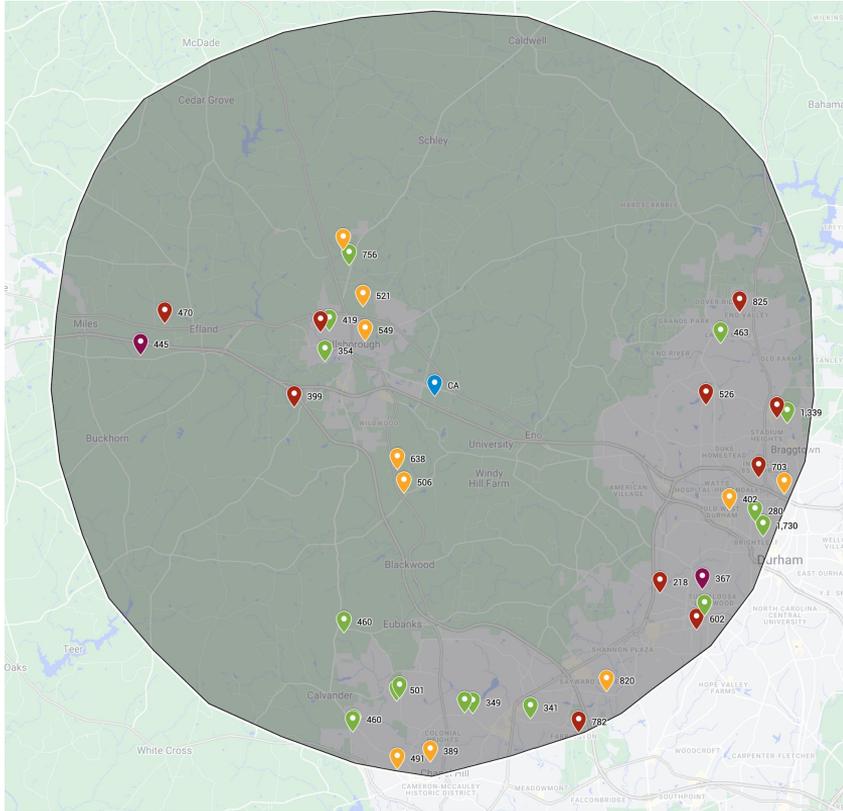
- The shaded area indicates a 30-minute drive time radius to the prospective site at 8:30 AM on a typical Monday.
- Primary commute patterns affecting nearby metropolitan areas such as Durham, Chapel Hill and Research Triangle Park during morning or afternoon (next slide) will have minimal impact on access to Carolina Achieve.

30 Minute Afternoon Drive Time Radius



- The purple area indicates a 30-minute drive time radius from the school at 4:00 PM on a typical Monday.

Size & Quality of Elementary & Middle Schools within 10 miles

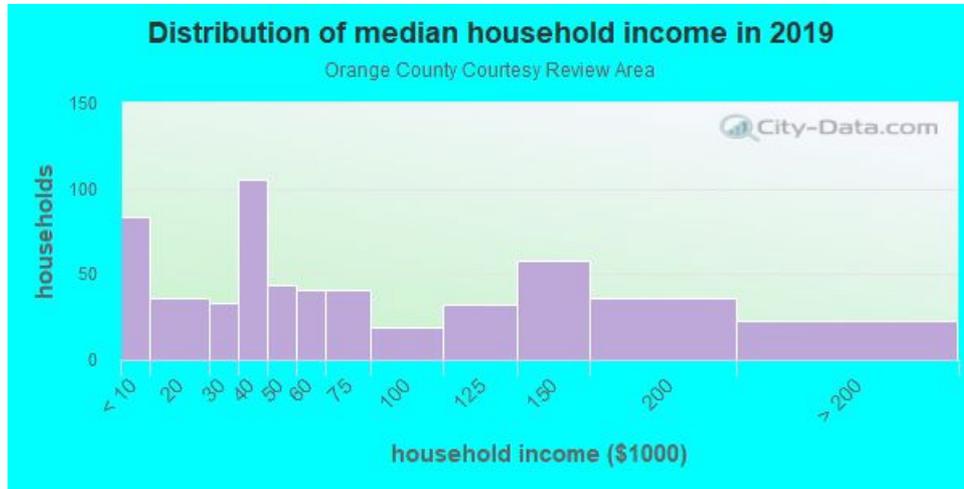


- | | |
|-----|-------|
| CA | 668 |
| 638 | 460 |
| 506 | 751 |
| 521 | 389 |
| 354 | 714 |
| 549 | 602 |
| 419 | 1,730 |
| 399 | 218 |
| 756 | 782 |
| 309 | 820 |
| 470 | 367 |
| 290 | 280 |
| 445 | 402 |
| 460 | 703 |
| 491 | 389 |
| 501 | 1,339 |
| 341 | 899 |
| 349 | 526 |
| | 463 |
| | 825 |
| | 635 |



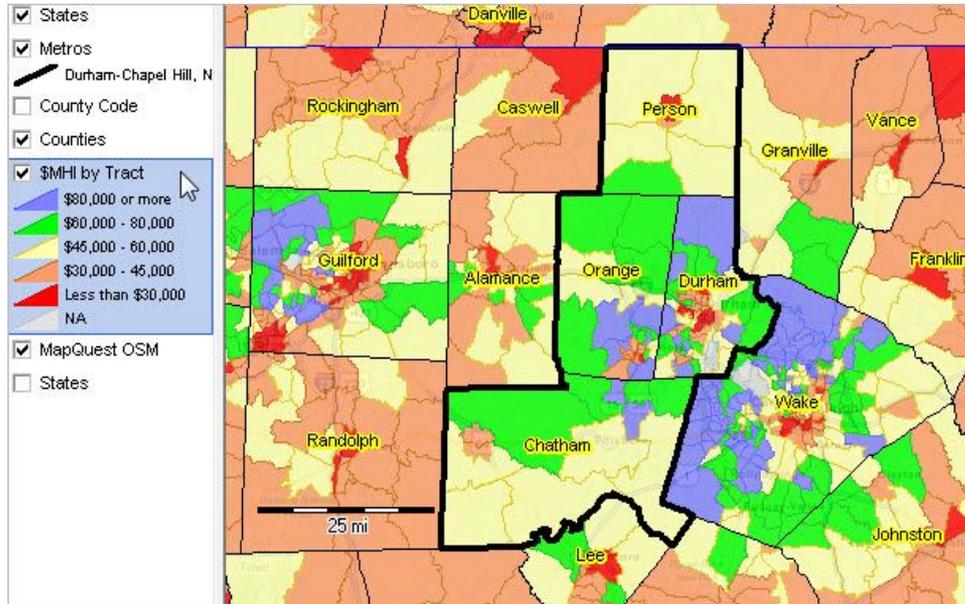
Traditional Elementary & Middle Schools (See appendix for Full List of Names with Ratings)

Access For Low Income Households



- The vision of Carolina Achieve that includes a commitment to underserved students will resonate strongly with families in close proximity to the school.
- A significant percentage of households in Orange County have an annual income below \$50,000.
- Carolina Achieve will provide access to low income families that is presently difficult to attain.

Access For Low Income Households

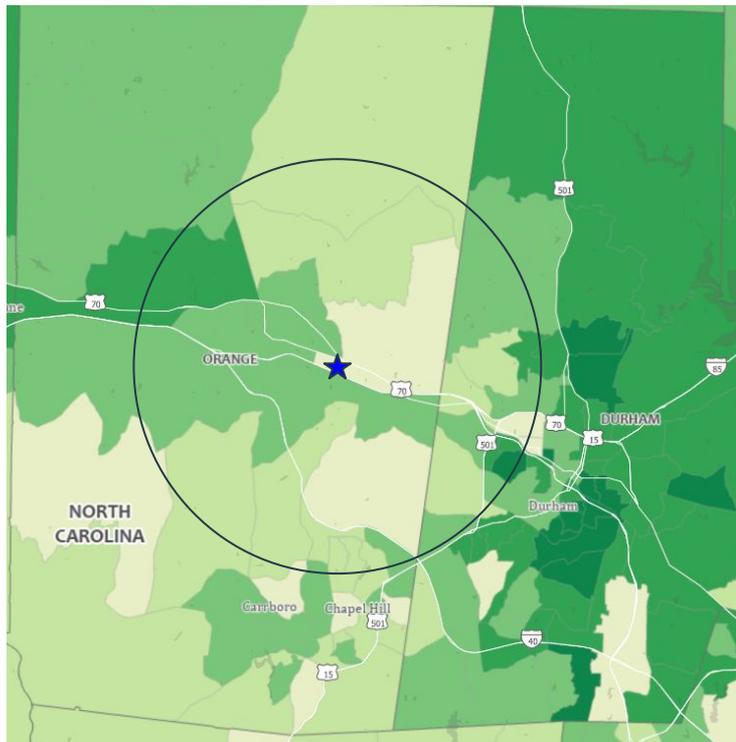


- There are only 3 moderately *high performing schools near the Carolina Achieve location.
- No high quality schools exist in the area north and east of Carolina Achieve.
- The areas in the northern half of Orange County and western Durham County include a lower percentage of high income households.
- Carolina Achieve's close proximity, ease of access and vision will make the school an ideal choice for these lower income families.

*High-performing school means a school that receives an A or B grade by the NC State Report Card while a Low-performing school receives a C, D, or F grade

African-American Population Metrics

- Several census tracts near Carolina Achieve have Black population percentages of 10% or greater.



This map shows the percentage of the total population that reported their race as Black or African American alone in the 2020 Census at the state, county, and census tract levels. Zoom in to see county- and tract-level data. Click on the map to learn more.

Legend

State (or state equivalent) boundary



County (or county equivalent) boundary



Minor civil division boundary



Census tract boundary



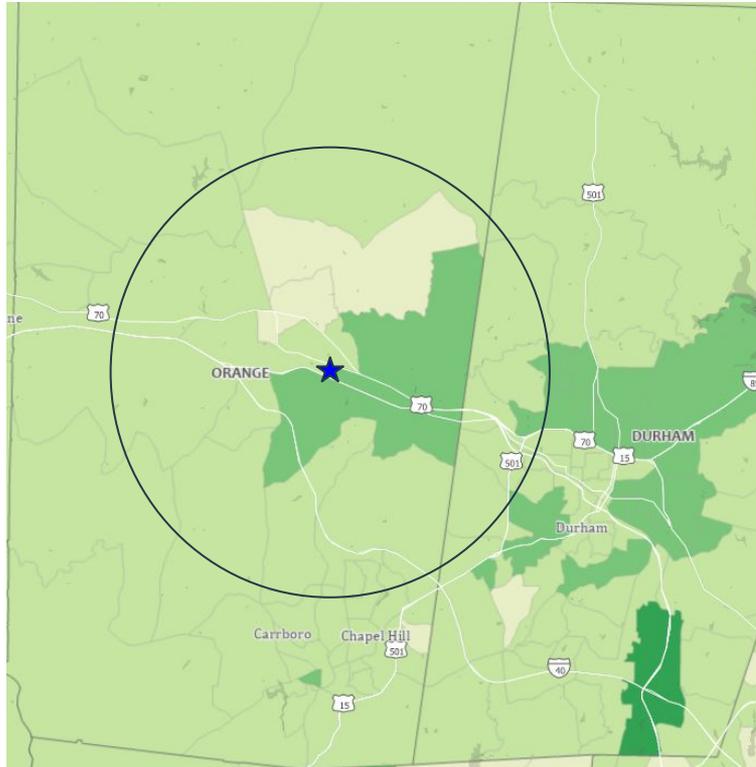
Percent Black or African American alone by census tract

- 50.0 or more
- 25.0 to 49.9
- 10.0 to 24.9
- 5.0 to 9.9
- Less than 5.0
- No population

U.S. percent = 12.4

Hispanic Population Metrics

- Many of the census tracts with the highest percentage of Hispanics are within a short drive of CA.



This map shows the percentage of the total population that reported their ethnicity as Hispanic or Latino from the 2020 Census at the state, county, and census tract levels. Zoom in to see county- and tract-level data. Click on the map to learn more.

Legend

State (or state equivalent) boundary

County (or county equivalent) boundary

Minor civil division boundary

Census tract boundary

Percent Hispanic or Latino by census tract

70.0 or more

50.0 to 69.9

20.0 to 49.9

5.0 to 19.9

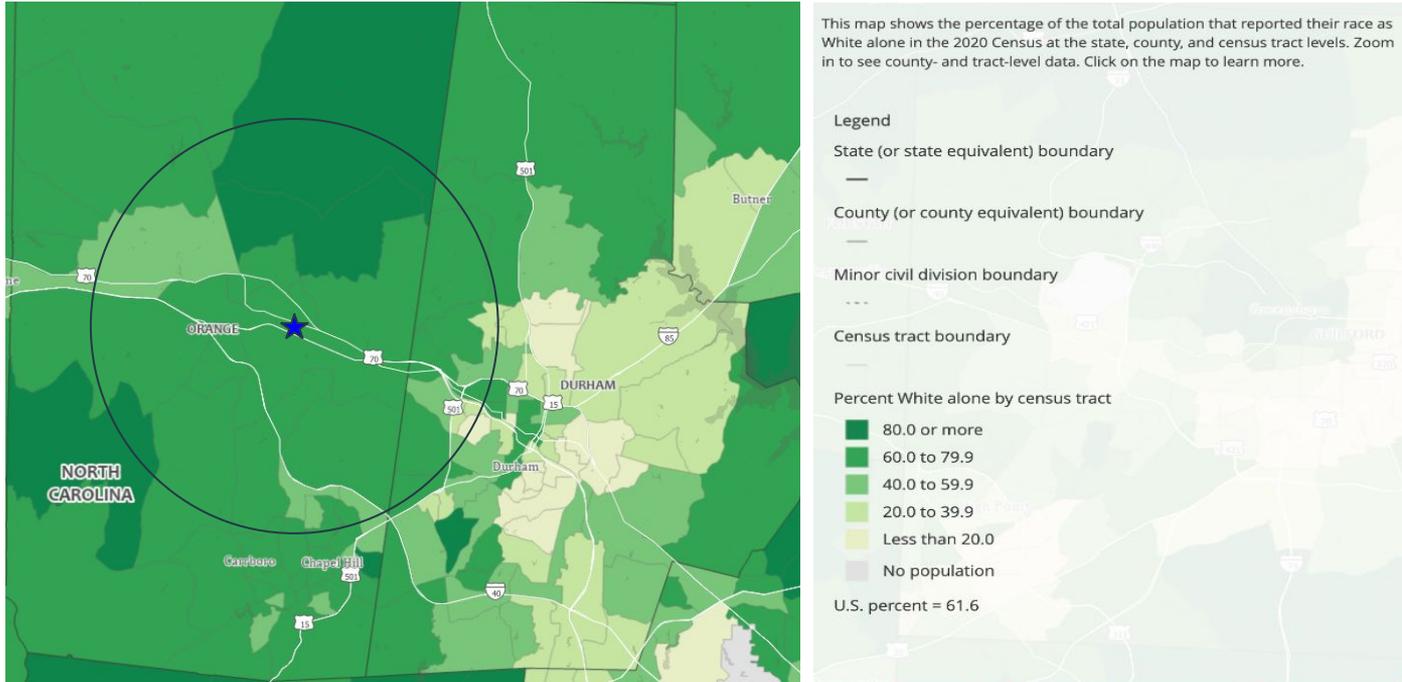
Less than 5.0

No population

U.S. percent = 18.7

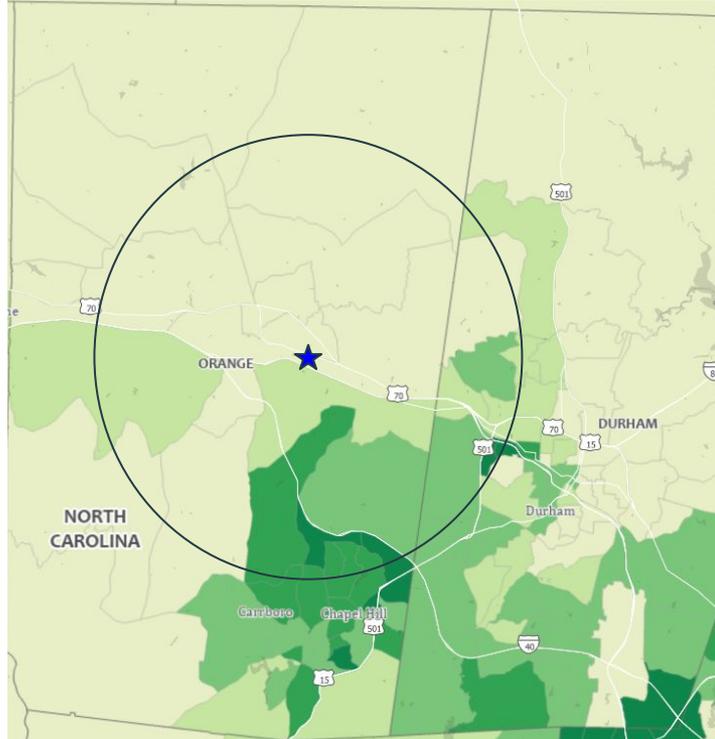
White Population Metrics

- Rural, predominantly white households also lack access to high performing schools in less densely populated portions of Orange and northern Durham County.



Asian Population Metrics

- Asian families are less likely to live in areas with greater poverty rates and are more likely to have medium-quality elementary and middle school options near them.



This map shows the percentage of the total population that reported their race as Asian alone in the 2020 Census at the state, county, and census tract levels. Zoom in to see county- and tract-level data. Click on the map to learn more.

Legend

State (or state equivalent) boundary



County (or county equivalent) boundary



Minor civil division boundary



Census tract boundary



Percent Asian alone by census tract

20.0 or more

10.0 to 19.9

5.0 to 9.9

2.5 to 4.9

Less than 2.5

No population

U.S. percent = 6.0

Citations

Slide 3 -

<https://www.osbm.nc.gov/facts-figures/population-demographics/state-demographer/countystate-population-projections/population-growth-2020-2030>

Slide 4 - <https://datacenter.aecf.org/data/tables/6169-children-by-age-group?loc=35&loct=5#detailed/5/4910-5009/false/574/137/12869>

Slide 6 - <https://www.google.com/maps/>

Slides 7 & 8 - <https://app.traveltime.com/>

Slide 9 & 11 - <https://ncreports.ondemand.sas.com>

Slide 12 - <https://www.city-data.com/>

Slide 13 - [Durham-Chapel Hill, NC MSA Situation & Outlook Report \(proximityone.com\)](#)

Slides 14, 15, 16, 17 - <https://mtgis-portal.geo.census.gov/arcgis/apps/MapSeries/index.html>

AUDITOR CONTACT INFORMATION

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Thompson, Price, Scott, Adams & Co.

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910-642-2109

<u>Board Member Name</u>	<u>Board Title</u>	<u>Phone Number</u>	<u>Email Address</u>	<u>County of Residence</u>	<u>Current Occupation</u>	<u>Past or Present Professional Licenses Held</u>	<u>Any disciplinary action taken against any of these professional licenses?</u>
John Oxaal	Chairman	650 380-0138	joxaal@srfunds.com	Durham	Venture Capital	None	
Banks Jefferson Clark	Director	919 949-4144	bjeffersonclark@gmail.com	Durham	Venture Capital	None	
Makayla Booker	Director	919 241-3346	makaylabooker@wallstreetjr.org	Durham	CEO	Registered Behavioral Technition - since 2018	None
Charles Lopez	Director	305 962-1493	charleslopez11@gmail.com	Orange	Head of People	NC Real Estate	None
Dwayne Campbell	Director	774 365-7941	dwayneoccampbell@gmail.com	Durham	Executive Fellow	None	
Anjanette Miller	Director	972 978-4833	anjanette@echo-NC.org	Durham	Chief Strategy and Programming Office	None	
Thomas Nechyba	Director	919 302-7377	Nechyba@duke.edu	Durham	Professor of Economics	None	

Carolina Achieve Student Recruitment Plan				
Time Period	Goal	Action	Responsible Party	Notes
Prior to Charter Application Deadline June 2022 - April 2023	Connect with 200 community members, businesses, and organizations to establish interest in a new public charter school in Orange County	Launch public relations campaign to introduce the school to the community; Publicize application submission; Establish website and social media presence; email blasts with newsletters; outreach to local representatives	Board and Head of School	
	Assemble a diverse founding board of directors	Connect with community members to establish a suitable pool of board candidates	Board Chair and Head of School	
Lead up to Ready to Open Phase May - August 2023	Connect with an additional 100 community members, businesses, and organizations to establish interest in a new public charter school in Orange County	Collaborate with preschools and childcare centers to host information sessions; attend community events; social media campaign	Board and Head of School	
	Establish partnerships with local businesses and organizations. Utilize this time and this process to introduce Carolina Achieve's entrepreneurial focus and Habits of Success concept	Host information sessions and focus groups with local businesses and organizations. Develop and utilize presentations for business leaders and organizations that detail plans for Carolina Achieve and the unique qualities that will be emphasized. Begin to cultivate relationships that will lead to local community leaders' active participation in the school on a regular basis.	Head of School	
	Maintain ongoing presence with the community at large, through a steady flow of social media activity, email newsletters, informational videos, and outreach at community events.	Implement regularly scheduled social media posts, newsletters, emails, and informational videos; develop collateral material and handouts for use at community events. Create a calendar of community events that Carolina Achieve representatives will attend throughout the anticipated service area.	Media Integrations	
Ready to Open Phase September 2023 - January 2024	Connect with an additional 200 community members	Collaborate with preschools and childcare centers to host information sessions, attend community events, social media campaign; Set lottery date for April 2024 (open enrollment from the date of charter approval through 3/31/24 or 60 days, whichever is greater); host community events (playdates, in-person and virtual open houses, community conversations); continue outreach to community, business leaders, and youth-focused and religious organizations; gather volunteers to be school ambassadors	Board and Head of School	All marketing information will be in available in English and Spanish. Powerpoint presentations from information sessions will be posted on the school's website and will contain information about the school and the enrollment process. A series of informative videos will also be accessible to interested families on the website and social media platforms.
	Obtain Letters of Intent	Encourage families to formally signal their intent to enroll in the school at the various public activities. Provide opportunities to do so on the school website. Incorporate messaging solicits on social media platforms on a regularly scheduled basis.	Board and Head of School	

Carolina Achieve Student Recruitment Plan				
Time Period	Goal	Action	Responsible Party	Notes
Open Enrollment and Lottery February - August 2024	Attain 100% capacity for Y1 enrollment goals	Create a direct mailing campaign to houses in specific zip codes in Orange and Durham Counties; Host and Publicize lottery event - invite community and business leaders, send out press releases, invite media to the event. Encourage people to share the information with other interested community members; A lottery will be held to celebrate with new families, whether or not the school has enough applicants to hold a lottery.	Head of School	
	Undertake a marketing and messaging campaign to generate awareness and drive applications	Implement internet-based marketing advertising that will share the Carolina Achieve message with tens of thousands of targeted families in the service area. Use this campaign to drive prospective families to our online open enrollment registration.	Media Integrations	
	Incorporate a "Recruit the Recruits" campaign to ensure Day 1 enrollment of accepted students	In addition to marketing to the general public as a means of ensuring robust enrollment and waitlist numbers, Carolina Achieve will also develop a series of messages and activities that is targeted specifically to people who have already signaled their intention to attend Carolina Achieve. We know that these families have choices and we need to continue to reinforce our school's attributes and competitive advantages in order to ensure that they stay in the "win column."	Media Integrations	
First 20 Days of School August - September 2024	Maintain 100% capacity for Y1 enrollment goals and build a waitlist across all grade levels	Analyze marketing strategies (June 2022 - present) and continue implementing the top three strategies, continue community outreach - open houses, information sessions, and preschool/childcare center relationship building	Head of School and School Team	Build trust with all stakeholders
Regular School Operations September 2024 - June 2025	Maintain 100% capacity for Y1 enrollment goals and build a waitlist across all grade levels	Nurture relationship with feeder preschools and childcare centers; Continue community outreach - open houses and information sessions; Empower PTA and all families to host enrollment events and recruit prospective families; Continue public relations campaign - print and social media. Make a conscious effort to make sure enrolled families feel valued and supported, so that they will remain at Carolina Achieve and serve as the strongest community advocates.	Head of School and School Team	



: All Competencies and Skills

Code	Skill Descriptor	Statement or Guiding Question
LC.1	Create a Just, Equitable, and Caring Learning Community	I can create a learning community where all stakeholders feel valued.
LC.1.1	Create a culture that is trauma-informed and utilizes restorative practices	I can provide the supports and opportunities to ensure that trauma-informed and restorative practices are consistently used across our community.
LC.1.2	Build and sustain relationships	I can build and sustain strong relationships to engage all stakeholders (district, authorizers, community members, families, staff, students).
LC.1.3	Create a culturally responsive school community	I value the cultures, identities and stories of all members in our community and foster an appreciation for how our unique experiences are an asset.
LC.1.4	Build and promote empathy and trust	I seek to understand the perspectives of all members of our community and work to create a safe and caring environment.
LC.1.5	Maintain transparency and effective communication	I can effectively tailor my communication to transparently engage and inform all stakeholders.
LC.1.6	Build a safe and connected learning community	I can ensure that procedures, rituals, routines, and events are in place to make all members of our community feel safe, connected, and valued.
LC.2	Commit to Personal and Professional Growth and Development	I can persevere through failure and setbacks and continually work on my personal and professional growth.
LC.2.1	Embrace challenge, risks, and change	I can embrace challenges, take risks, and persevere through failure and change.
LC.2.2	Seek feedback, support, and resources	I consistently seek and embrace feedback and am comfortable asking for help when I need it.
LC.2.3	Practice self-care and build emotional intelligence	I practice self-care and continue to build my emotional capacity to work effectively with all members of our community.
LC.2.4	Seek opportunities for personal and professional learning	I seek and follow through on opportunities to develop my areas of personal growth, deepen my professional practice, and improve my leadership skills.
LC.2.5	Embrace accountability and uphold expectations as a leader	I consistently hold myself accountable to the duties and responsibilities that are expected of me as a leader.



: All Competencies and Skills

Code	Skill Descriptor	Statement or Guiding Question
LC.2.6	Embrace and effectively use technology	I am comfortable using a variety of technology and I value how the use of technology supports the implementation of our school's vision.
LC.3	Foster a Cohesive School Vision	I can actively engage all stakeholders in supporting the mission and vision of my school or district and can create an environment that supports innovation.
LC.3.1	Create and communicate a shared vision	I can clearly communicate the vision, mission, and strategic goals of my school and I actively engage key stakeholders to increase buy-in and shared ownership of this vision.
LC.3.2	Effectively align human capital and financial resources to achieve vision	I can systematically leverage, organize, and deploy resources (human, financial, operational) to implement an innovative school model.
LC.3.3	Rethink and replace traditional school structures	I can create systems and structures to replace traditional age-based, time-based, course-based, grade-based structures to personalize learning for students.
LC.3.4	Align talent management strategy to school vision	I can develop and execute a talent management strategy that recruits, supports, retains, and develops high quality staff in support of our school vision.
LC.3.5	Create an environment to support innovation and lead the change management process.	I create a trusting and supportive environment that enables change and innovation to succeed.
LC.4	Ensure High Quality Instruction and Learning Experiences	I can ensure that learning experiences provide students with opportunities to be exposed to high quality instruction aligned to the competencies, to engage in real-world learning, and to apply their learning to make an impact.
LC.4.1	Ensure high quality curriculum design and implementation	I can ensure the use of high-quality curricular materials and assessments to improve student outcomes.
LC.4.2	Support the effective use of high leverage instructional practices	I can support teachers in effectively utilizing high leverage instructional practices.
LC.4.3	Create consistent opportunities to analyze student work and assessments	I can create consistent opportunities for instructional staff to analyze performance assessments and student work aligned to the competencies.



: All Competencies and Skills

Code	Skill Descriptor	Statement or Guiding Question
LC.4.4	Ensure the use of competencies and continua	I can ensure that the competencies and continua are used effectively across all learning experiences and are aligned to instruction, assessment and feedback.
LC.4.5	Ensure real world learning, impact, and strategic partnerships	I can ensure that students have opportunities to engage in real-world learning experiences and to connect with community partners.
LC.4.6	Support teachers in creating a personalized learning environment	I can create opportunities for teachers to observe, learn and, practice the skills to effectively facilitate a personalized learning environment.
LC.5	Build the Capacity of Others	I can contribute to and support the personal and professional growth of others.
LC.5.1	Create a culture of high expectations and accountability	I can establish a school culture of high and equitable expectations by balancing accountability and support.
LC.5.2	Create opportunities for collaboration and	I can create and support opportunities for collaboration and team building across our community.
LC.5.3	Distribute leadership	I can build the capacity of my staff members and trust them to take on leadership roles within our community.
LC.5.4	Support the personal and professional development of staff	I can ensure that there are consistent opportunities tailored to the needs of my staff to support their personal and professional growth and development.
LC.5.5	Implement a personalized coaching model	I can provide staff with personalized coaching support and regular and actionable feedback.
LC.6	Make Data-Driven Decisions to Support a Continuous Improvement Process	I can use data to make strategic and high level decisions focused on positive student outcomes.
LC.6.1	Create and monitor a strategic plan and goals	I can create a strategic plan aligned to my school needs and priorities and measure and monitor progress toward our goals.
LC.6.2	Create systems to collect data and monitor implementation	I can create and support the implementation of school-wide systems to collect, track, and monitor school data.
LC.6.3	Analyze and make use of data for continuous improvement	I can create a data driven culture where we regularly analyze and utilize data to inform our instruction and decisions, monitor school progress, and measure student outcomes.



: All Competencies and Skills

Code

Skill Descriptor

Statement or Guiding Question

LC.6.4

Transparently share data relevant data with stakeholders

I can consistently and transparently share relevant school data with all of our stakeholders (e.g., students, teachers, families, governance, district leadership).

LC.1 Create a Just, Equitable, and Caring Learning Community

I can create a learning community where all stakeholders feel valued.

	Novice	Developing	Proficient	Expert/Mentor
<p>LC.1.1</p> <p>Create a culture that is trauma-informed and utilizes restorative practices</p>	<p>I am beginning to learn more about how trauma can affect individuals, families, and organizations (e.g., feeling silenced, powerless and oppressed). I am building my understanding of the importance of utilizing trauma-informed and restorative practices.</p> <p>I am learning how to implement trauma informed and restorative practices.</p> <p>I provide resources for my staff to learn how to implement trauma-informed and restorative practices (e.g., de-escalation, proactive strategies, restorative conferences, collaborative problem solving, repairing harm).</p> <p>I reach out to others to support me in making decisions and am still working on establishing a clear decision making process.</p>	<p>I understand how trauma can affect individuals, families, and organizations (e.g., feeling silenced, powerless and oppressed) and seek opportunities to build my understanding of trauma informed and restorative practices.</p> <p>I ensure trauma-informed and restorative practices and procedures are implemented.</p> <p>I create opportunities for staff to be trained in some aspects of trauma-informed and restorative practices (e.g., de-escalation, proactive strategies, restorative conferences, collaborative problem solving, repairing harm) to create a safe community.</p> <p>I have developed a decision making process that engages individuals in decisions that affect them, explains the reasoning behind a decision, and ensures everyone knows what is expected of them.</p>	<p>I understand how trauma can affect individuals, families, and organizations (e.g., feeling silenced, powerless and oppressed) and I create opportunities for our community to learn more about how trauma affects individuals and our community. I model utilizing trauma-informed and restorative practices to create and maintain a safe, supportive, and equitable learning environment.</p> <p>I develop and ensure the effective implementation of trauma-informed and restorative systems, policies, procedures, and practices that reflect a commitment to equity, inclusion and belonging.</p> <p>I create consistent and frequent opportunities for staff and students to be trained in all aspects of trauma-informed and restorative practices (e.g., de-escalation, proactive strategies, restorative conferences, collaborative problem solving, repairing harm).</p> <p>I am committed to implementing a fair process for decision making that engages individuals in decisions that affect them, includes their views and opinions, explains the reasoning behind a decision to everyone who has been involved or who is affected by it, and ensures everyone clearly understands the decision and what is expected of them.</p>	<p>I foster an environment where all stakeholders believe in the importance of creating a trauma informed and restorative community. I model utilizing trauma-informed and restorative practices to create and maintain a safe, supportive, and equitable learning environment.</p> <p>I reflect on, evaluate, and revise our established trauma informed and restorative systems, policies, procedures, and practices to ensure they reflect a commitment to equity, inclusion and belonging.</p> <p>I create ongoing opportunities for staff, students and families to be trained in all aspects of trauma-informed and restorative practices (e.g., de-escalation, proactive strategies, restorative conferences, collaborative problem solving, repairing harm). I monitor and evaluate the effectiveness of our implementation.</p> <p>I am committed to implementing a fair process for decision making that engages individuals in decisions that affect them, includes their views and opinions, explains the reasoning behind a decision to everyone who has been involved or who is affected by it, and ensures everyone clearly understands the decision and what is expected of them. I reflect on decisions and ask for feedback from stakeholders to improve our strategic decision making process.</p>
<p>LC.1.2</p> <p>Build and sustain relationships</p>	<p>I understand the importance of strong relationships and I am learning to build positive relationships with my staff, students, and families.</p> <p>I provide a few opportunities for stakeholders to be part of school activities and initiatives.</p> <p>I solicit actionable feedback for a specific purpose from a selected group of people and implement their input when possible.</p> <p>I am beginning to develop staff understanding of the importance of strong relationships in our community.</p>	<p>I value strong relationships and I am building positive relationships with my staff, students, and families.</p> <p>I provide a variety opportunities for stakeholders to be part of school activities and initiatives. I create a few opportunities for stakeholders to plan, contribute and/or participate in school activities or initiatives.</p> <p>I sometimes solicit actionable feedback from some stakeholder groups and implement their input when possible.</p> <p>I develop staff understanding of the importance of strong relationships in our community. I am starting to build staff capacity to create strong relationships with our students and families.</p>	<p>I value all stakeholders and I build and sustain positive relationships with my staff, students, families, district leaders, education partners, and community members.</p> <p>I provide a variety of opportunities for stakeholders to be a part of school activities and initiatives. I create opportunities for stakeholders to build relationships and collaborate with one another (e.g., PTO / Home and School organizations, community events, fundraisers).</p> <p>I solicit actionable feedback from various stakeholder groups representing a variety of perspectives in order to strengthen relationships, participation, and collaboration in our community.</p> <p>I develop staff understanding of the importance of strong relationships in our community. I am starting to build staff capacity to create strong relationships with our students and families.</p>	<p>I value all stakeholders and I build and sustain positive relationships with my staff, students, families, district leaders, education partners, and community members. I ensure stakeholders feel valued and included in the community.</p> <p>I provide a variety of opportunities for stakeholders to be part of school activities and initiatives. I create opportunities for stakeholders to build relationships, collaborate, and lead new activities or initiatives (e.g., PTO / Home and School organizations, community events, fundraisers).</p> <p>I constantly solicit actionable feedback from all stakeholder groups representing a variety of perspectives in order to strengthen relationships, participation, and collaboration in our community.</p> <p>I develop staff understanding of the importance of strong relationships in our community. I am starting to build staff capacity to create strong relationships with our students and families.</p>
<p>LC.1.3</p> <p>Create a culturally responsive school community</p>	<p>I am becoming aware of my assumptions and biases and need support to reflect on and challenge them.</p> <p>I am becoming aware of the need to understand and value the unique experiences of the members of our community.</p> <p>I recognize the cultural differences and diversity in our community and need to learn more about what a culturally responsive community is.</p> <p>I occasionally celebrate some cultures and identities within our community.</p>	<p>I sometimes reflect on my own history, beliefs, biases, and behaviors. I work to examine and challenge my own assumptions and biases.</p> <p>I am beginning to authentically engage with our community (e.g., staff, students, families, communities, partners) and I am beginning to learn more about the unique experiences each member brings.</p> <p>I am learning how to create a culturally responsive community. I understand the importance of having culturally responsive curriculum, assessments, and learning materials for students.</p> <p>I value the differences and diversity in our community and occasionally celebrate some cultures and identities within our community.</p>	<p>I regularly reflect on my own history, beliefs, biases, and behaviors. I work to cultivate an environment that encourages our community to examine and challenge our individual and collective assumptions and biases.</p> <p>I authentically engage with our community (e.g., staff, students, families, communities, partners) and value the experiences each member brings.</p> <p>I occasionally provide access to learning opportunities that build our capacity to become a culturally responsive community. I review curriculum, assessments, and learning materials to ensure students have access to culturally responsive learning experiences.</p> <p>I value the differences and diversity in our community and ensure our school's practices and initiatives celebrate most cultures and identities within our community.</p>	<p>I regularly reflect on my own history, beliefs, biases, and behaviors and openly share my unique story, emphasizing places where there is alignment between my why and the organization's mission and vision. I lead, participate in, and allocate time for open and honest dialogue to examine and challenge our individual and collective assumptions and biases.</p> <p>I authentically engage with our community (e.g., staff, students, families, communities, partners) with a curiosity to understand their unique stories and value the experiences each member brings.</p> <p>I provide access to frequent learning opportunities that build our capacity to create a culturally responsive community. I often review and evaluate curriculum, assessments, and learning materials to ensure students have access to culturally responsive learning experiences.</p> <p>I value the differences and diversity in our community and ensure our school's practices and initiatives celebrate all cultures and identities within our community.</p>

LC.1 Create a Just, Equitable, and Caring Learning Community

I can create a learning community where all stakeholders feel valued.

	Novice	Developing	Proficient	Expert/Mentor
<p>LC.1.4</p> <p>Build and promote empathy and trust</p>	<p>I am learning to actively listen to others to try to understand the meaning behind what others are saying.</p> <p>I am learning to ask questions if I don't understand what was said to ensure I am accurately interpreting the words and meaning.</p> <p>I am sometimes aware of the impact my decisions will have on others and I need to include others in my decision-making.</p>	<p>I actively listen to others to try to understand the meaning behind what others are saying. I am learning to pay close attention to other cues (e.g., facial expressions, gestures, tone of voice) to try to better understand how others might be feeling.</p> <p>I ask questions if I don't understand what was said to try to understand and accurately interpret the words and meaning.</p> <p>I am aware that decisions I make will affect others and I am starting to take that into account and include others in my decision making process.</p> <p>I am learning to understand the perspective and personal experiences of others to promote trust, problem-solving, conflict resolution, and innovation.</p>	<p>I actively listen to others to hear and understand and I am becoming more aware of how I might be judging what they say. I pay close attention to nonverbal cues such as facial expressions and gestures and I listen to the tone of voice and pace of speech for additional cues about how others are truly feeling.</p> <p>I ask effective questions (e.g., clarifying, probing, paraphrasing) if I don't understand what was said and try to summarize or restate what I heard to ensure I am accurately interpreting the words and meaning. I am sometimes open to sharing personal experiences in some situations or with some people to build understanding and trust.</p> <p>Before I act or make decisions, I think about who will be affected by my actions, what it will mean to them, and how it might make them feel. I often seek input and feedback from those individuals to help inform my decision.</p> <p>I sometimes put myself in another's place to understand their perspective and personal experiences to promote trust, problem-solving, conflict resolution, and innovation.</p> <p>I try to understand the needs of others to promote happiness and success.</p>	<p>I actively listen to others to hear and understand and I am becoming more aware of how I might be judging what they say. I pay close attention to nonverbal cues such as facial expressions and gestures and I listen to the tone of voice and pace of speech for additional cues about how others are truly feeling.</p> <p>I ask effective questions (e.g., clarifying, probing, paraphrasing) if I don't understand what was said and try to summarize or restate what I heard to ensure I am accurately interpreting the words and meaning. I am sometimes open to sharing personal experiences in some situations or with some people to build understanding and trust.</p> <p>Before I act or make decisions, I think about who will be affected by my actions, what it will mean to them, and how it might make them feel. I often seek input and feedback from those individuals to help inform my decision.</p> <p>I sometimes put myself in another's place to understand their perspective and personal experiences to promote trust, problem-solving, conflict resolution, and innovation.</p> <p>I make it a priority to try to understand the needs, hopes, and dreams of others and how that impacts their happiness, success, and relationships.</p>
<p>LC.1.5</p> <p>Maintain transparency and effective communication</p>	<p>I send communication as needed to inform our community about the day to day functions.</p> <p>I use multiple outlets (e.g., written, email, in-person, Slack, Hangouts, Teams, Zoom) to communicate decisions, events or incidents, and innovative initiatives as needed.</p> <p>I mostly communicate to our community and provide limited opportunities for conversation and/or feedback.</p> <p>I have not worked with staff on what effective communication looks like and I do not have a process for monitoring outgoing communication.</p>	<p>I send regular communication about events, updates, and relevant information to inform our community about the day-to-day functions.</p> <p>I use multiple outlets (e.g., written, email, in-person, Slack, Hangouts, Teams, Zoom) to communicate information, decisions, events or incidents, and innovative initiatives.</p> <p>I implement effective two-way communication structures with stakeholders that encourage conversations.</p> <p>I support staff with communicating necessary information (e.g., checklists, scripts, templates, sample emails) with relevant stakeholders.</p>	<p>I send regular and consistent communication about events, updates, and relevant information to inform our community about the day-to-day functions.</p> <p>I use multiple outlets (e.g., written, email, in-person, Slack, Hangouts, Teams, Zoom) to communicate information, decisions, events, incidents, innovative initiatives in a timely fashion and tailor the message and outlet to best support the setting and/or audience. (e.g., parents at back to school nights, superintendent, community and board members at board meetings).</p> <p>I employ a variety of communication strategies (e.g., sharing the why, the how, provide framing, outlining timelines, maintaining an objective tone) to transparently communicate the message.</p> <p>I build the capacity of staff to clearly and effectively communicate necessary information (e.g., checklists, scripts, templates, sample emails) with relevant stakeholders.</p>	<p>I send regular and consistent communication about events, updates, and relevant information to inform and engage our community about the day to day functions and opportunities for involvement.</p> <p>I use multiple outlets (e.g., written, email, in-person, Slack, Hangouts, Teams, Zoom) to communicate information, decisions, events, incidents, innovative initiatives in a timely fashion and tailor the message and outlet to best support the setting and/or audience. I have a process for ensuring that everyone in our community is receiving the communication.</p> <p>I employ a variety of communication strategies (e.g., sharing the why, the how, provide framing, outlining timelines, maintaining an objective tone) to transparently communicate the message, build on vision, goals and values, create investment, solve problems, and/or find solutions.</p> <p>I build the capacity of staff to clearly and effectively communicate necessary information (e.g., checklists, scripts, templates, sample emails) with relevant stakeholders and tailor the message and outlet to best support the context and/or audience.</p>
<p>LC.1.6</p> <p>Build a safe and connected learning community</p>	<p>I am struggling to find the time to make myself accessible to staff and students (e.g., greetings, open door policy, checking in, farewells). I am aware I am not often visible (e.g., hallways, classrooms, student and staff lunchrooms) and have limited interactions with staff and students.</p> <p>I have designated time for an Advisory/Mentorship program, but it is used ineffectively and/or inconsistently.</p> <p>I have a few community rituals and routines (e.g., town halls; community meetings; ceremonies; celebrations) to build a connected community, but they are not always effective and/or are inconsistent.</p> <p>I develop the required school safety systems and procedures.</p>	<p>I am striving to build a connected community by being accessible and interacting more often with staff and students (e.g., greetings, open door policy, checking in, farewells) as often as I can. I am sometimes visible (e.g., hallways, classrooms, student and staff lunchrooms) and am sometimes available for impromptu conversations.</p> <p>I ensure there is an Advisory/Mentorship model or framework in place that meets regularly. I am supporting the effective use of Advisory time.</p> <p>I have a few effective and consistent community rituals and routines (e.g., town halls; community meetings; ceremonies; celebrations) to build a connected community.</p> <p>I develop the required school safety systems and procedures with my team to ensure a safe and secure community.</p>	<p>I build a connected community by being present, accessible, and regularly engaging with staff and students (e.g., greetings, open door policy, checking in, farewells). I am regularly visible (e.g., hallways, classrooms, student and staff lunchrooms) and am often interactive and approachable for impromptu conversations.</p> <p>I monitor and support the implementation of an effective Advisory/Mentorship model or framework aligned to the Mentoring through Advisory teacher competency to ensure every student is known, valued, and supported.</p> <p>I build and execute a variety of effective community rituals (e.g., town halls; community meetings; ceremonies; celebrations) to build a connected community. I employ a variety of creative strategies to meet the diverse needs of our community.</p> <p>I develop school safety systems and procedures to ensure a safe and secure community and assess and/or adjust safety plans, as needed, based on school data, crisis, feedback, regulations and/or mandates with my team.</p>	<p>I build a connected community by being present, accessible, and engaging in meaningful and authentic interactions with staff and students (e.g., greetings, open door policy, checking in, farewells). I am regularly and consistently visible (e.g., hallways, classrooms, student and staff lunchrooms) and am approachable for impromptu conversations.</p> <p>I monitor and support the implementation of an effective Advisory/Mentorship model or framework and I create and implement a review process aligned to the skills and indicators outlined in the Mentoring through Advisory teacher competency to ensure every student is known, valued, and supported.</p> <p>I build and execute a variety of effective and meaningful community rituals and events consistently and when expected (e.g., town halls; community meetings; ceremonies; celebrations). I ensure these rituals meet the diverse needs of our community. The rituals and routines are known and valued by our community.</p> <p>I develop school systems and procedures to ensure a safe and secure community and regularly assess and/or adjust safety plans based on school data, crisis, feedback, regulations and/or mandates with the involvement of my team and various safety agencies (e.g., police, district, fire department, safety personnel, community watch).</p>

LC.1 Create a Just, Equitable, and Caring Learning Community

I can create a learning community where all stakeholders feel valued.

	Novice	Developing	Proficient	Expert/Mentor
	I have welcoming events at the beginning of the year for new students, staff and, families.	I have some programs, activities, and/or events in place to welcome and support new students, staff and, families to ensure they feel connected to our community. (e.g., mentorship program, orientation, welcoming events).	I have a variety of programs, activities, and events to welcome, onboard and continually support new students, staff and, families to ensure they feel connected to our community.(e.g., mentorship program, orientation, welcoming events, onboarding activities).	I have a variety of effective programs, activities, and events to welcome, onboard and continually support new students, staff and, families to ensure they feel connected to our community.(e.g., mentorship program, orientation, welcoming events, onboarding activities). I have a process in place to gather and apply feedback to add to and/or improve these offerings.
	I implement inconsistent and/or ineffective routines (e.g., transitions, lunches, school activities, arrival and dismissal).	I create and implement some routines (e.g., transitions, lunches, school activities, arrival and dismissal).	I create efficient and detailed routines (e.g., transitions, lunches, school activities, arrival and dismissal) to try to maximize instructional time and maintain focus on the school vision.	I create efficient and detailed routines (e.g., transitions, lunches, school activities, arrival and dismissal) and monitor their effective implementation to maximize instructional time and maintain focus on our vision.

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Sources: [New Leaders Principal Evaluation Handbook](#)

[PA Leadership Framework](#)

[Leadership Competencies For Learner-Centered, Personalized Education](#)

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LC.2 Commit to Personal and Professional Growth and Development

I can preserve through failure and setbacks and continually work on my personal and professional growth.

	Novice	Developing	Proficient	Expert/Mentor
<p>LC.2.1</p> <p>Embrace challenge, risks, and change</p>	<p>I rarely take on new challenges or risks to pursue learning.</p> <p>I worry too much about what could go wrong or how I might fail and I am unable to get past the worry to take a risk.</p> <p>I struggle to identify personal barriers (e.g., mindset, beliefs, circumstances) that inhibit my ability to take risks.</p> <p>I am uncomfortable with ambiguity, so when things are uncertain and/or I do not have all the answers, I look to others to make decisions for me.</p>	<p>With encouragement, I sometimes take on new challenges or risks to pursue learning.</p> <p>I worry about what could go wrong, how I might fail, or how others will respond, but with encouragement, I try to reframe my thinking to a wondering instead of a worry.</p> <p>I can identify personal barriers (e.g., mindset, beliefs, circumstances) that inhibit my ability to take risks.</p> <p>I am uncomfortable with ambiguity, so when things are uncertain, and/or I do not have all the answers, I can seek support to help me make necessary decisions.</p>	<p>I seek new challenges and I take risks to pursue learning.</p> <p>When I begin to worry, I reframe my thinking to a wondering instead of a worry and sometimes take the risk.</p> <p>I identify, reflect on, and sometimes overcome personal barriers (e.g., mindset, beliefs, circumstances) that could inhibit my ability to take risks and address enduring problems.</p> <p>I work through ambiguity when things are uncertain and/or I do not have all the answers by utilizing some techniques and strategies (e.g., seeing situations on a continua not as a dichotomy of good/bad or right/wrong, finding a third way, acting even when you are unsure of the outcome, making a judgement call with partial data, navigating conflicting viewpoints, embrace complexity) in order to make necessary decisions and take some calculated risks.</p>	<p>I seek new challenges and take risks outside of my comfort zone to pursue opportunities for learning and personal growth.</p> <p>I catch myself when I begin to worry and I can immediately shift my thinking to curiosity which allows me to be more comfortable with taking risks.</p> <p>I analyze, reflect on, and consistently overcome personal barriers (e.g., mindset, beliefs, circumstances) that could inhibit my ability to take risks and address enduring problems.</p> <p>I embrace ambiguity when things are uncertain and/or I do not have all the answers by utilizing a variety of techniques and strategies (e.g., seeing situations on a continua not as a dichotomy of good/bad or right/wrong, finding a third way, acting even when you are unsure of the outcome, making a judgement call with partial data, navigating conflicting viewpoints, embrace complexity) in order to effectively make decisions, seize opportunities, and take calculated risks.</p>
<p>LC.2.2</p> <p>Seek feedback, support, and resources</p>	<p>I struggle to be open when receiving feedback and criticism. I do not ask for help because I am afraid of appearing inept or incompetent.</p> <p>I am beginning to build a network of individuals to support me personally and professionally.</p> <p>I have a limited knowledge of resources within my school, district, and community and I am beginning to seek out these resources to support me.</p> <p>I am learning what my leadership style is and what it means to be an authentic leader.</p>	<p>I am open to feedback and criticism from a few trusted individuals. I am beginning to seek feedback from others. I will ask for help, but only from certain trusted individuals.</p> <p>I have a network of a few trusted individuals who support me personally and professionally.</p> <p>I have some knowledge of resources within my school, district, and community and I am learning to navigate them to solve problems and get support.</p> <p>I am working on being a more authentic leader by acting in alignment to my values and honestly sharing my thoughts and perspectives.</p>	<p>I regularly seek and use feedback and criticism (when appropriate) from a select group of individuals to improve my practice, identify my strengths and weaknesses, and help me grow both professionally and personally.</p> <p>I have a network of diverse individuals who support me personally and professionally to help me consider a variety of experiences and perspectives to evolve my thinking.</p> <p>I have considerable knowledge of resources within my school, district, and community, so I know how to navigate them to solve problems and get support.</p> <p>I strive to be an authentic leader by acting in alignment to my values and honestly sharing my thoughts and perspectives. I lean on my strengths and am becoming more transparent about my weaknesses.</p> <p>I recognize I lean more toward challenge or support and am intentionally focusing on balancing leading with both my head (e.g., focusing on mandates, data, vision and/or goals) and my heart (e.g., recognizing what others are thinking and feeling).</p>	<p>I consistently and regularly seek and use feedback and criticism (when appropriate) from a wide variety of individuals (e.g., administrators, parents, staff, students) to help identify my strengths and weaknesses, improve my practice, and help me grow both professionally and personally.</p> <p>I consistently seek to diversify and strengthen my personal and professional networks to ensure I am considering a diverse set of experiences and perspectives to evolve my thinking.</p> <p>I have an extensive repertoire of local, regional and national resources I can navigate to efficiently and strategically solve problems and get support.</p> <p>I strive to be an authentic leader by being transparent about my strengths and weaknesses, acting in alignment to my values, and honestly sharing my thoughts and perspectives.</p> <p>I regularly and consistently balance challenge and support by leading with both my head (e.g., focusing on mandates, data, vision and/or goals) and my heart (e.g., recognizing what others are thinking and feeling). I can evaluate situations to know if and when challenge or support is needed.</p>
<p>LC.2.3</p> <p>Practice self-care and build emotional intelligence</p>	<p>I am unaware when I am responding emotionally in overwhelming and stressful situations. I need others to help identify and manage my emotions.</p> <p>I sometimes feel burnt out and frustrated. I know that I need to take care of myself, but I do not know what to do or how to make time to practice self-care.</p> <p>I recognize when my team is experiencing burnout, but I am not sure of the best way to support them.</p> <p>When prompted by others, I reflect on the effectiveness of my leadership and my relationships with all stakeholders.</p>	<p>I am learning to become more self-aware and to manage my emotions during overwhelming and stressful situations. I need others to help me follow up on situations to gain clarity and vital information, and identify the appropriate strategy or approach to move forward in a way that strengthens relationships and allows me to achieve our goals.</p> <p>I value self-care, but sometimes I feel guilty when I make time for self-care. Sometimes I make time to use strategies to practice self-care.</p> <p>I recognize when my team is experiencing burnout and make adjustments to provide opportunities to renew and recharge. I provide a few opportunities for others to practice self-care.</p> <p>I sometimes reflect on the effectiveness of my leadership and my relationships with all stakeholders.</p>	<p>I am sometimes self-aware and can recognize and manage my emotions. I sometimes objectively assess situations to gain clarity and vital information. I can identify the appropriate strategy or approach to move forward in a way that strengthens relationships and allows me to achieve our goals. I sometimes reflect on my experiences to recognize where my emotions are coming from and why.</p> <p>I value self-care without guilt, understanding that my ability to care for myself means I can better care for others. I recognize my personal signs of burnout. I regularly make time to use strategies to practice self-care.</p> <p>I recognize when my team is experiencing burn out and make adjustments to provide opportunities to renew and recharge. I provide some opportunities for others to practice self-care and plan ways to ensure they feel supported.</p> <p>I regularly and consistently reflect on the effectiveness of my leadership and my relationships with all stakeholders.</p>	<p>I regularly and consistently practice self-awareness to recognize and manage my emotions and to remain calm and in control at all times especially in overwhelming and stressful situations. I objectively assess situations to gain clarity and vital information. I identify the appropriate strategy or approach to move forward in a way that strengthens relationships and allows me to achieve our goals. I regularly reflect on my experience to recognize where my emotions are coming from and why.</p> <p>I value self-care without guilt, knowing that my ability to care for myself means I can better care for others. I recognize my personal signs of burnout and I proactively use a variety of ongoing strategies to practice self-care.</p> <p>I prioritize the self-care of others and proactively plan ways to ensure they feel supported. I recognize when my team is experiencing burn out and make adjustments to provide opportunities to renew and recharge.</p> <p>I regularly and consistently reflect on the effectiveness of my leadership and my relationships with all stakeholders and I identify themes or patterns in my behaviors, skills, and mindsets that I can learn from and improve.</p>

LC.2 Commit to Personal and Professional Growth and Development

I can preserve through failure and setbacks and continually work on my personal and professional growth.

	Novice	Developing	Proficient	Expert/Mentor
LC.2.4 Seek opportunities for personal and professional learning	When promoted and with support, I set measurable goals (e.g., SMART goals) for my personal and professional development that are based on my self-assessment on the leadership competencies.	I set measurable goals (e.g., SMART goals) for my personal and professional development that are based on my self-assessment on the leadership competencies. I occasionally track my progress towards achieving my goals.	I set measurable goals (i.e. SMART goals) for my personal and professional development that are based on my thorough self-assessment on the leadership competencies. I consistently track my progress towards achieving my goals and I reflect on my progress.	I set measurable goals (i.e. SMART goals) for my personal and professional development that are based on my thorough self-assessment on the leadership competencies. I consistently track my progress towards achieving my goals and I model self-reflection by sharing my successes and failures with others.
	I am not aware of or have not used self-assessments (e.g., Myers-Briggs, conflict style, Johari Window Model) to learn more about myself and how I engage with others.	I have used some self-assessments (e.g., Myers-Briggs, conflict style, Johari Window Model) to learn more about myself and how I engage with others.	I utilize self-assessments (e.g., Myers-Briggs, conflict style, Johari Window Model) and solicit feedback from others through informal surveys (e.g., school/district/network surveys) to learn more about myself and how I engage with others and to improve my relationships and leadership skills.	I utilize a variety of self-assessments (e.g., Myers-Briggs, conflict style, Johari Window Model) and solicit feedback from others through informal and formal assessments and surveys (e.g., 360, insight survey, school/district/network surveys) to learn more about myself and how I engage with others and to improve my relationships and leadership skills.
	I attend professional development that is required by my district.	I occasionally attend voluntary professional development but sometimes struggle to find the time. I collaborate with others and am learning to become an effective contributor.	I seek opportunities to grow professionally and to collaborate with and learn from others (e.g., attend conferences, workshops, take courses). I regularly read articles, blogs, and research to help me learn, grow, and improve my leadership skills and the teaching and learning happening in my school or district.	I seek opportunities to regularly connect with and contribute to the broader learning community (e.g., attending and presenting at workshops and conferences, taking or teaching courses, writing blogs) that stimulate, nurture, and support my personal and professional growth and allow me to collaborate with and learn from others. I regularly read articles, blogs, and research to help me learn, grow, and improve my leadership skills and the teaching and learning happening in my school or district.
	I am learning to become more comfortable working with a coach and am meeting with my coach when required.	I am beginning to see the value of coaching and understand there are many areas I can improve through the coaching process. I am trying to be more consistent with my meeting times.	I see the value in coaching and regularly meet with my coach and embrace the opportunities for reflection and feedback that support my personal and professional growth.	I value the practice of personal and professional coaching and I see my coach as a trusted partner whom I can reach out to often and engage with openly and honestly. I am able to identify and reflect on how coaching has made me a more effective leader on the areas that I still need to improve.
I am not yet comfortable in having visitors to my school or district.	I sometimes welcome visitors both from within and outside of my district to observe certain aspects of our model.	I regularly welcome visitors both from within and outside of my district and provide opportunities for them to observe my leadership, our innovation, and things that are going well. I sometimes share our challenges.	I regularly welcome visitors both from within and outside of my district and provide opportunities for them to observe my leadership, our innovation, things that are going well and things that need improvement. I am comfortable sharing successes and struggles.	
LC.2.5 Embrace accountability and uphold expectations as a leader	I am not as consistent as I want to be in completing my tasks and responsibilities in a timely fashion.	I am becoming more consistent in completing my tasks and tending to my responsibilities in a timely and transparent manner.	I regularly complete my tasks and tend to my responsibilities in a timely and transparent manner. When I am not able to complete a task or meet deadline, communicate with all people involved and adjust accordingly.	I use a task management system to ensure I consistently complete my tasks and tend to my responsibilities in a timely and transparent manner. When I am not able to complete a task or meet deadlines, I make sure to communicate why, let people know in advance, if possible, and propose a new plan or timeline.
	I am not always comfortable taking personal responsibility for my mistakes.	I sometimes take personal responsibility for my mistakes and am becoming aware of the times when I don't.	I regularly take personal responsibility for my mistakes and see them as opportunities to learn and to grow.	I publicly acknowledge my mistakes to model holding myself accountable to the community and view my own lack of knowledge or competence as an invitation to learn and to grow.
	I sometimes struggle to follow through on my commitments, including being timely, present and engaged in interactions with team members, students and other stakeholders.	I am becoming more consistent in following through on my commitments, including being timely, present and engaged in interactions with team members, students and other stakeholders.	I regularly follow through on my commitments, including being timely, present and engaged in my interactions with team members, students and other stakeholders.	I regularly follow through on my commitments and have a system in place to keep track and notify me so that I am on time. I am consistently present and engaged in my interactions with team members, students and other stakeholders.
	When others fall short in meeting responsibilities and commitments, I am not always aware of when I respond either with too much accountability or support.	When others fall short in meeting their responsibilities and commitments, I am aware I sometimes provide too much accountability or too much support and am taking steps to improve this balance.	When others fall short in meeting their responsibilities and commitments, I provide the right balance of accountability or support they need to ensure they get back on track.	When others fall short in meeting their responsibilities and commitments, I effectively and consistently provide the right balance of accountability and supports and create a personalized plan or process to ensure they get back on track.
I am not consistent in adhering to our school norms and I am trying to recognize when I break a norm.	I am becoming more consistent in following our school norms and recognize when I break a norm.	I consistently adhere to our school norms and sometimes address when a norm is broken by myself or a colleague.	I consistently adhere to our school norms and I consistently address when a norm is broken by myself or one of my colleagues. I invite my community to give me feedback if I do not recognize that I have broken a norm.	
I am beginning to realize the importance of having support for technology in my school and I rely on my district or other outside organization to fix and maintain our technology systems.	I am aware of the importance of having support for technology in my school and, in addition to relying on my district, I assign a teacher or part-time person to help fix and maintain our technology systems.	I am aware of the importance of having support for technology in my school and I have allocated resources to a hire full-time person to fix and maintain our technology systems.	I am aware of the importance of having sufficient support for technology in my school and I have allocated resources to ensure that we have trained personnel to be able to fix and maintain our technology systems (e.g., Create a help desk space, hire a Director of Technology, provide release time for a Teacher Technology Leader, develop internship for students to work in the help desk).	

LC.2 Commit to Personal and Professional Growth and Development

I can preserve through failure and setbacks and continually work on my personal and professional growth.

	Novice	Developing	Proficient	Expert/Mentor
LC.2.6 Embrace and effectively use technology	I adopt technology systems and platforms that are fully supported by the district and I do not have a strategy or plan for how these systems and platforms are used (e.g., teachers can use different platforms to manage tasks or different ways to share resources).	I adopt necessary technology systems and platforms that are fully supported by the district and am identifying and piloting other systems we need to support our innovation. I have started to create a plan to define how these systems and platforms are used and supported.	I adopt necessary technology systems and platforms that are supported by the district and am implementing additional systems to support our innovation. I have created a plan to communicate how each technology system or platform is used and the importance of each system. I have identified staff, vendors, or partners that are responsible for managing access, permissions, account creation, data sharing, and feature development (e.g. creating student and staff accounts each year, setting up the learning platform, scheduling data exports, or creating new data dashboards).	I can create a 'stack' of technology systems and platforms that is coherent, meets the needs of our innovation, is easy to support and maintain, and can be improved over time. I have identified staff, vendors, or partners that are responsible for managing access, permissions, account creation, data sharing, and feature development (e.g. creating student and staff accounts each year, setting up the learning platform, scheduling data exports, or creating new data dashboards).
	I rely on my district to manage, support, and train all members of our community on how to use technology in my school.	I ensure my staff receives initial technology training and I provide some resources on our website and within our platforms to help members of our community to learn how to use the technology in my school (e.g., Technology FAQ, video tutorials in the PLP, or a link to request support).	I can create a process for the training, support, use, and management of our technology in our school and ensure my staff receives trainings and resources available to support other members of our community (e.g., computer distribution and collection, parent night to review PLP, request documented plans and processes from the IT staff).	I can create a clear and transparent process for the training, support, use, and management of our technology for all members of our community (e.g., computer distribution and collection, training families on Slate and PLP, login issues)
	I utilize district professional development and technology coaches to help my staff integrate technology into their instructional practices.	I utilize district professional development, district technology coaches, and outside consultants to help my staff integrate technology into their instructional practices.	I utilize the appropriate resources both within and outside of my district to help my staff integrate technology into their instructional practices and begin to identify teachers who can support other teachers.	I can create a team of experts both within and outside of the school to help my staff effectively integrate technology into their instructional practices (e.g., Provide release time for a teacher to coach, utilize district technology coaches, or create a full time coaching position).
	I need support to learn how to use our technology.	I am comfortable using familiar technology and need support in learning to use unfamiliar or new technology.	I am comfortable using a variety of technology on a daily basis.	I am comfortable using a variety of technology on a daily basis and I model using technology for students and staff.
			I evaluate the effectiveness of my school or district's technology and seek out opportunities to use new and/or more effective technology.	I evaluate the effectiveness of my school or district's technology, seek out opportunities to use new and/or more effective technology, and find opportunities to simplify our technology stack.

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Sources: [New Leaders Principal Evaluation Handbook](#)

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LC.3 Foster a Cohesive School Vision

I can actively engage all stakeholders in supporting the mission and vision of my school or district and can create an environment that supports innovation.

	Novice	Developing	Proficient	Expert/Mentor
<p>LC.3.1</p> <p>Create and communicate a shared vision</p>	<p>I am starting to take ownership of our vision or am creating a vision if it does not exist.</p> <p>I share our vision with stakeholders in a few settings (e.g., back to school nights, board meetings, district/state meetings, when other schools visit)</p> <p>I am assessing how well our vision has been implemented and how well all stakeholders understand the vision.</p> <p>I am starting to make our vision more visible.</p>	<p>I develop a vision that encompasses high student achievement and postsecondary readiness through the development and application of essential qualities, skills, and mindsets with a select team of individuals.</p> <p>I share our vision with stakeholders in some settings (e.g., back to school nights, board meetings, district/state meetings, when other schools visit). I can clearly and effectively communicate our innovative initiatives.</p> <p>I promote our vision to build support and buy-in from the community.</p> <p>I create an environment where our vision and core values are visible.</p> <p>I am starting to align decisions and initiatives with our vision.</p>	<p>I engage some stakeholder groups (e.g., staff, students, families, community) in the collaborative development of our vision that encompasses high student achievement and postsecondary readiness through the development and application of essential qualities, skills, and mindsets.</p> <p>I share our vision with stakeholders in a variety of settings (e.g., back to school nights, board meetings, district/state meetings, when other schools visit). I can clearly and effectively communicate our innovative initiatives.</p> <p>I inspire stakeholders to take ownership of and promote our vision to build support and buy-in from the community.</p> <p>I create an environment where our vision and core values are visible and experienced by anyone who enters our building.</p> <p>I ensure all decisions and initiatives are aligned to our vision.</p>	<p>I engage all stakeholder groups (e.g., staff, students, families, community) in the collaborative development a vision that encompasses high student achievement and postsecondary readiness through the development and application of essential qualities, skills, and mindsets.</p> <p>I intentionally plan opportunities to share our vision with stakeholders in a variety of settings (e.g., back to school nights, board meetings, district/state meetings, when other schools visit). I can clearly and effectively communicate the "why" and the "how" of our innovative initiatives.</p> <p>I build the capacity of others to communicate the why and the how of our innovative initiatives and inspire stakeholders to take ownership of and promote our vision to build support and buy-in from the community.</p> <p>I create an environment where our vision and core values are visible and experienced in all aspects of our building.</p> <p>I ensure all decisions and initiatives are aligned to our vision. I regularly revisit our vision with staff and leadership to re-engage and reinvest stakeholders.</p>
<p>LC.3.2</p> <p>Effectively align human capital and financial resources to achieve vision</p>	<p>I am starting to assess how well the use of time, schedules, budgets and the allocation of resources are aligned with our vision and improvement initiatives.</p> <p>I am beginning to learn more about the external resources that exist to support our vision and improvement initiatives of our school/district/program.</p>	<p>I am beginning to ensure decisions made about staffing (e.g., dual certifications, pathways coordinator, climate and culture staff) the use of time (e.g., weekly PD, regular Advisory time) schedules (interdisciplinary studios, internships, place-based learning), budgets (e.g., additional systems, outside provider support), and the allocation of resources are aligned to our vision.</p> <p>I can identify external resources that could contribute to our vision and improvement initiatives of our school/district/program (e.g., community partnerships, dual enrollment, internships).</p> <p>I am beginning to develop systems to manage the human and financial resources to support the achievement of our vision.</p>	<p>I can ensure most decisions made about staffing (e.g., dual certifications, pathways coordinator, climate and culture staff) the use of time (e.g., weekly PD, regular Advisory time) schedules (interdisciplinary studios, internships, place-based learning), budgets (e.g., additional systems, outside provider support), and the allocation of resources are aligned to our vision.</p> <p>I can identify and access external resources that could contribute to our vision and improvement initiatives of our school/district/program (e.g., community partnerships, dual enrollment, internships).</p> <p>I utilize systems to manage the human and financial resources to support the achievement of our vision. I sometimes assess the effectiveness of the allocation of resources in achieving our vision and improvement initiatives.</p>	<p>I can ensure all decisions made about staffing (e.g., dual certifications, pathways coordinator, climate and culture staff) the use of time (e.g., weekly PD, regular Advisory time) schedules (interdisciplinary studios, internships, place-based learning), budgets (e.g., additional systems, outside provider support), and the allocation of resources are aligned to our vision.</p> <p>I can identify, access, and effectively utilize external resources to support our vision and improvement initiatives of our school/district/program (e.g., community partnerships, dual enrollment, internships).</p> <p>I utilize transparent and detailed systems to optimize the management of human and financial resources to support the achievement of our school vision. I regularly assess the effectiveness of the allocation of resources in achieving our vision and improvement initiatives.</p>
<p>LC.3.3</p> <p>Rethink and replace traditional school structures to support personalized and competency-based education</p>	<p>I have incorporated competencies into our courses and they are still part of a traditional time-based course structure. Each course receives a grade which incorporates the competency levels but does not solely reflect the competency performance (e.g., includes participation, work completion, homework). We are not yet tracking competencies outside of courses and cannot be certain students are reaching a level on the competencies that indicates postsecondary readiness.</p> <p>I am implementing a traditional schedule (e.g., 7-9 periods, 45-60 minutes long, siloed content areas).</p> <p>I am using a traditional required or chosen Student Information System that is time and course-based.</p>	<p>I have incorporated competencies into our courses and they are still part of a traditional time-based course structure. Each course receives a traditional grade which incorporates the competency levels but does not solely reflect the competency performance (e.g., includes participation, work completion, homework). I am beginning to track a subset of those competencies outside of courses as a graduation requirement and award credit through the curation of competency portfolios.</p> <p>I am implementing a mostly traditional schedule but have provided regular time for innovative experiences (e.g., interdisciplinary projects, competency portfolio curation, seminar blocks, flex time) or learning experiences outside of the school (e.g., community projects, internships, place-based learning).</p> <p>I am using a traditional required or chosen Student Information System that is time and course-based and also have a system to track competency progress on a subset of competencies (e.g., Google Sheets tracking, Competency tracking platform).</p>	<p>I have incorporated competencies throughout all our learning experiences and implemented a personalized competency-based model by tracking all implemented competencies to mastery. I create a set of competency-based graduation requirements and am converting competencies into traditional grades with the opportunity to earn advanced credit or be credited through competency growth.</p> <p>I am implementing a flexible schedule where students have some choice and some requirements and change experiences based on competency requirements. Students have some opportunities for acceleration and to engage in learning experiences outside of the school (e.g., passion projects, community projects, internships, place-based learning), and to engage in learner-driven experiences.</p> <p>I choose and implement a competency tracking system that includes student and family dashboards, to transparently communicate progress and growth and help our school implement a personalized competency-based model to allow for anytime, anywhere learning (e.g., tracking and assessing learning happening outside of the school such as during internships, work experience, extra-curricular activities).</p>	<p>I can develop and implement a personalized competency-based model where students graduate by demonstrating mastery of competencies, both within and outside of school, through the curation of evidence (e.g., portfolios, Mastery Transcript (MTC), competency-based transcripts). I create a set of foundational and advanced competency credits that are awarded based on the demonstrated competency performance levels and growth and no longer award credit through courses and traditional grades.</p> <p>I ensure the creation of a flexible schedule that breaks down traditional structures (e.g., time-based, grade-based, course-based) to allow for acceleration and to maximize student choice in their learning experiences based on their interests, needs, competencies required for graduation, and postsecondary plans. (e.g., passion projects, community projects, internships, place-based learning).</p> <p>I choose and implement competency tracking, learning management, and scheduling systems or platforms that will help our school implement a personalized competency-based model, allow for anytime, anywhere learning, and transparently communicate progress and growth to all stakeholders (e.g., tracking and assessing learning happening outside of the school such as during internships, work experience, extra-curricular activities).</p>

LC.3 Foster a Cohesive School Vision

I can actively engage all stakeholders in supporting the mission and vision of my school or district and can create an environment that supports innovation.

	Novice	Developing	Proficient	Expert/Mentor
		I can identify barriers to implementing and authentic competency-based model caused by traditional structures and systems (e.g., state reporting and evaluation, Student Information System, Learning Management Systems, testing requirements) and I am trying to work around them to implement a more authentic competency-based model.	I can identify and effectively communicate barriers to implementing and authentic competency-based model caused by traditional structures and systems (e.g., state reporting and evaluation, Student Information System, Learning Management Systems, testing requirements) and I working around them while starting to have conversations about barriers with district/state/governing individuals.	I can identify and effectively communicate barriers to implementing an authentic competency-based model caused by traditional structures and systems (e.g., state reporting and evaluation, Student Information System, Learning Management Systems, testing requirements) and I work at both the district and the state levels or with governing bodies to build understanding and collaborate on solutions.
LC.3.4 Align talent management strategy to school vision	I am developing a selection team and hiring process.	I oversee the selection team in developing and implementing clear, specific selection criteria and a hiring process.	I lead the selection team in the hiring and induction/orientation process. I engage the selection team (e.g., staff, families, students) in developing and implementing clear, specific selection criteria and a hiring process (e.g., hiring for mindsets and alignment to our vision, designing performance tasks, behavior-based interviews).	I build staff capacity to lead and participate in the selection, hiring and induction/orientation process. I engage the selection team (e.g., staff, families, students) in developing and implementing clear, specific selection criteria and a hiring process (e.g., hiring for mindsets and alignment to our vision, designing performance tasks, behavior-based interviews).
	I rely on the school district's pipeline for candidates.	I identify a variety of pipelines within the district for high-quality recruits.	I identify a variety of pipelines within and beyond the district for high quality recruits.	I identify a variety of pipelines within and beyond the district for high quality recruits. I cultivate relationships with interested candidates and support them in meeting the requirements and qualifications to ensure they can be hired when position become available.
	I work with my school district to identify and fill vacancies.	I identify vacancies to inform selection and fill vacancies as they arise.	I proactively identify vacancies to inform selection and when possible, I fill vacancies early. I try to hire staff who are diverse and bring a variety of skill sets and expertise.	I proactively identify vacancies to inform selection and when possible, I fill vacancies early. I proactively seek and recruit staff that brings diversity and a variety of skill sets and expertise.
	I hire staff to fill required vacancies based on certifications and qualifications.	I am beginning to place staff in areas of their interests based on their certifications and qualifications.	I am starting to utilize staff strategically based on their skills, strengths, interests, and passions.	I utilize staff strategically based on their skills, strengths, interests, and passions.
	I have not yet developed a strategy for retaining effective staff members.	I try to retain effective staff members by providing them with opportunities aligned to their skills, passion and interest.	I retain effective staff members by identifying and recognizing irreplaceables, providing them with opportunities aligned to their skills, passions, and interests, and ensuring they feel satisfied and fulfilled in their work. I support their growth and development aligned to the teacher competencies and I am beginning to build a strategy to counsel out staff who are not making progress.	I strategically retain effective staff by identifying and recognizing irreplaceables, providing them with opportunities aligned to their skills, passions, and interests, and ensuring they feel satisfied and fulfilled in their work. I support in their growth and development aligned to the teacher competencies and I have a strategy to counsel out staff who are not making progress.
		I have a designated teacher to check in on novice teachers.	I assign novice teachers to expert teachers for support.	I create a teacher mentoring program to pair novice teachers with expert teachers to support their personal and professional growth.
LC.3.5 Create an environment to support innovation and lead the change management process	I am aware I need to create and implementation plan for our innovative initiatives and am starting to think through the steps involved in implementation.	I am working with a few leaders to develop an implementation plan for our innovative initiatives.	I work with key stakeholders to develop an implementation plan and timeline for our innovative initiatives that outlines the change process.	I work with key stakeholders to develop an implementation plan and timeline that outlines the change process, the expectations for all staff, and the feedback, analysis, and iteration process.
	I am uncertain about the changes and innovations we are implementing in my school or district and am I not yet confident in my ability to lead these changes.	I believe in the changes and innovations we are implementing in my school or district and am learning how to lead the change process.	I strongly believe in the changes and innovations we are implementing and I effectively lead and manage the change process. I develop a team of leaders, inclusive of most stakeholder groups, to support the implementation and change process.	I strongly believe in the changes and innovations we are implementing and I effectively lead and manage the change process. I develop a team of leaders inclusive of members of all stakeholder groups, to support the implementation and change process.
	I am often unaware of my traditional beliefs and mindsets about education until others bring it to my attention.	I am somewhat aware of my traditional beliefs and mindsets about education and the purpose of school but I don't always realize how and when they interfere with my ability to innovate or change.	I am aware of and often challenge my traditional beliefs and mindsets about education and the purpose of school and realize how and why they might interfere with my ability to innovate and change. I sometimes challenge others to recognize when their traditional beliefs are interfering with our innovative initiatives.	I am aware of and consistently challenge my traditional beliefs and mindsets about education and the purpose of school and recognize when they are getting in the way of change and innovation. I consistently challenge others to recognize when their traditional beliefs are interfering with our innovative initiatives.
	I expect to see the desired outcomes of our innovation happen quickly and when they do not, I fall back on traditional and familiar structures and practices which can lead to abandoning the changes and innovations.	I understand innovation and change take time, but when I do not see short term results, I start to fall back on traditional and familiar structures and practices and question the effectiveness of the innovation.	I understand an innovative mindset requires commitment and that innovation and change are not easy and take time, patience, and perseverance. I ensure we acknowledge and celebrate our short-term wins on the road to our long-term improved outcomes. I also understand the risks and barriers involved with innovation and recognize when I am making decisions based on fear or uncertainty.	I model an innovative mindset by showing a commitment to our innovation and by communicating change is a process that is not easy, takes time, patience, and perseverance. I ensure we acknowledge and celebrate our short-term wins on the road to our long-term improved outcomes. I analyze and plan ahead to address the risks and barriers involved with innovation and recognize when I am making decisions based on fear or uncertainty.
		I am hesitant to implement many of our innovative initiatives and look to others to lead the changes.	I implement some of our innovative initiatives but am not confident in leading all areas of the changes and innovations.	I consistently push our innovative initiatives forward, even when faced with setbacks or challenges and I seek feedback and collaboration in solving problems and iterating on the design and implementation of our innovative initiatives. I also reach out to other schools or organizations with experience in similar innovative initiatives for support, guidance, and collaboration.

LC.3 Foster a Cohesive School Vision

I can actively engage all stakeholders in supporting the mission and vision of my school or district and can create an environment that supports innovation.

Novice

Developing

Proficient

Expert/Mentor

Sources: [New Leaders Principal Evaluation Handbook](#)

Last edited: 2019-08-17

LC.4 Ensure High Quality Instruction and Learning Experiences

I can ensure that learning experiences provide students with opportunities to be exposed to high quality instruction aligned to the competencies, to engage in real-world learning, and to apply their learning to make an impact.

	Novice	Developing	Proficient	Expert/Mentor
<p>LC.4.1</p> <p>Ensure high quality curriculum design and implementation</p>	<p>I am building my understanding of the components of our instructional framework.</p> <p>I am reviewing the alignment of our curriculum to our instructional framework and am beginning to assess our curriculum needs.</p> <p>I am beginning to monitor the implementation of curriculum.</p>	<p>I understand and am beginning to outline the components of our instructional framework and I am beginning to align curriculum to the framework for some learning experiences.</p> <p>I am beginning to create a review process aligned to our instructional framework to assess curriculum needs and to ensure our curriculum is high quality and competency-aligned.</p> <p>I work with my instructional team to monitor the implementation of curriculum through the use of curriculum guides or facilitation plans.</p>	<p>I understand, articulate, and implement the components of our instructional framework and I ensure our curriculum is aligned to the framework across most learning experiences.</p> <p>I create and implement a review process aligned to our instructional framework and I ensure the design of the curriculum is high quality, competency-aligned, and provides access to rigorous and culturally-relevant learning materials.</p> <p>I lead my instructional team in the monitoring and implementation of high quality and rigorous curriculum (e.g., review student work, review assigned tasks, monitor roadmap implementation, monitor daily facilitation and pacing). I create opportunities for my instructional team to make recommendations for curriculum adjustments and areas for professional development and coaching.</p> <p>I gather some feedback from students and teachers, after curriculum implementation, to assess relevance and levels of engagement.</p>	<p>I understand, articulate, and implement the components of our instructional framework and I ensure our curriculum is aligned to the framework across all learning experiences.</p> <p>I create and implement a review process and evaluation tool aligned to our instructional framework and I ensure that the design of the curriculum is high quality, competency-aligned, and provides access to rigorous and culturally-relevant learning materials.</p> <p>I provide opportunities to build the capacity of my instructional team to effectively lead and monitor the implementation of high quality and rigorous curriculum (e.g., review student work, review assigned tasks, monitor roadmap implementation, monitor daily facilitation and pacing). I create opportunities for my instructional team to make recommendations for curriculum adjustments and areas for professional development and coaching.</p> <p>I ensure there is a process in place, after curriculum implementation, to gather feedback from a variety of stakeholders to assess relevance and levels of engagement, evaluate the quality of student work, and to measure the effectiveness and rigor of the curriculum.</p>
<p>LC.4.2</p> <p>Support the effective use of high leverage instructional practices</p>	<p>I am beginning to learn more about high-leverage instructional practices (e.g., questioning strategies, metacognitive strategies, flexible grouping, visible thinking strategies, think alouds, using manipulative for abstract concepts, co-teaching), resources and tools that support teachers in strengthening their instructional practice to improve student outcomes.</p> <p>I share instructional practices with teachers to improve student outcomes.</p> <p>My instructional leaders and/or I conduct required formal observations to monitor instruction.</p> <p>I am beginning to put together an instructional leadership team.</p>	<p>I identify some high-leverage instructional practices and utilize some resources and tools (e.g., walkthrough forms, teaching trajectories, strategy guides, teacher competencies, coaching frameworks) that support teachers in strengthening their instructional practice to improve student outcomes.</p> <p>I work with teachers to understand and implement high-leverage practices to improve student outcomes.</p> <p>My instructional leadership team and/or I conduct informal and formal observations to monitor instruction.</p> <p>I am working with the instructional leadership team to understand high-leverage instructional practices to use with teachers to meet student needs and improve student outcomes.</p>	<p>I identify a consistent set of high-leverage instructional practices and utilize resources and tools (e.g., walkthrough forms, teaching trajectories, strategy guides, teacher competencies, coaching frameworks) that support teachers in strengthening their instructional practice to improve student outcomes.</p> <p>I support teachers by utilizing some techniques and strategies e.g., (check ins, feedback sessions, practicing, modeling, co-teaching, in the moment feedback) to ensure teachers understand and can implement high-leverage practices to improve student outcomes.</p> <p>My instructional leadership team and I create and conduct a process for informal and formal observations to monitor instruction and provide teachers with immediate and actionable feedback to strengthen their instructional practice to improve student outcomes.</p> <p>I ensure the instructional leadership team understands and supports teachers with utilizing some high-leverage instructional practices with teachers to meet student needs and improve student outcomes.</p>	<p>I identify a consistent set of high-leverage instructional practices and create and utilize resources and tools (e.g., walkthrough forms, teaching trajectories, strategy guides, teacher competencies, coaching frameworks) that support teachers in strengthening their instructional practice to improve student outcomes.</p> <p>I support teachers by utilizing a variety of techniques and strategies (e.g., check ins, feedback sessions, practicing, modeling, co-teaching, in the moment feedback) to ensure teachers understand and can effectively implement high-leverage practices to improve student outcomes.</p> <p>My instructional leadership team and I create and conduct a regular and consistent process for informal and formal observations to monitor instruction and provide teachers with immediate and actionable feedback to strengthen their instructional practice to improve student outcomes.</p> <p>I build the capacity of the instructional staff to support teachers in effectively utilizing a variety of high leverage instructional practices that meet student needs and improve student outcomes.</p>
<p>LC.4.3</p> <p>Create consistent opportunities to analyze student work and assessments</p>	<p>I recognize norming student work in teams is important but I have not yet allocated time for it to happen.</p> <p>I need support to create a protocol and/or facilitate norming of student work.</p> <p>I am seeking support to create a process for curating student work samples.</p> <p>I am working on creating expectations for teachers to analyze student work to inform their instruction and to improve their studio design.</p> <p>I understand the importance of reviewing student work to make evidence-based decisions about improving teacher practice and instruction, but have not yet found the time to do this.</p> <p>I have not yet incorporated the evaluation of student work with teachers as part of the coaching and feedback process.</p>	<p>I allocate a few times during the year for teachers to collaborate to norm student work within their content and/or cross-disciplinary teams.</p> <p>I can identify a teacher, coach, or outside organization to support the facilitation of a protocol for norming student work.</p> <p>I create a process for curating at least one annotated student work sample for some competencies to provide exemplars for teachers and students.</p> <p>I create expectations for teachers to analyze student work to inform their instruction and to improve their studio design.</p> <p>I sometimes review student work to make evidence-based decisions about improving teacher practice, instruction, and student learning.</p> <p>I sometimes look at student work with teachers as part of the coaching and feedback process.</p>	<p>I allocate time each month for teachers to collaborate to norm student work within both content and cross-disciplinary teams.</p> <p>I model and facilitate a protocol for norming student work to ensure teachers understand and follow the protocol.</p> <p>I create a process for curating at least one annotated student work sample for all competencies to provide exemplars for teachers and students.</p> <p>I create expectations for teachers to regularly and consistently analyze student work to inform their instruction and to improve their studio design and have a process for teachers to share evidence of how they are doing this (e.g., reflection logs, coaching conversations, daily facilitation plans, changes to studio design).</p> <p>With my leadership team, I review student work a few times throughout the year to make evidence-based decisions about improving teacher practice, instruction, and student learning.</p> <p>I evaluate student work with teachers as part of the coaching and feedback process.</p>	<p>I ensure there is consistent and frequent time allocated each month for teachers to collaborate to norm student work within both content and cross-disciplinary teams.</p> <p>I ensure a protocol is regularly and consistently being used to norm student work across all settings.</p> <p>I create a process for curating annotated student work samples at a variety of levels across all competencies to provide exemplars for teachers and students.</p> <p>I create expectations, processes, and protocols to ensure teachers are regularly and consistently analyzing student work to inform their instruction and to improve their studio design.</p> <p>With my leadership team, I frequently review student work to make evidence-based decisions about improving teacher practice, instruction, and student learning.</p> <p>I ensure the evaluation of student work is a regular and consistent part of the coaching and feedback process with every teacher.</p>
	<p>I let teachers decide which competencies they want to teach.</p>	<p>I ask teachers to submit a list of the competencies they teach by learning cycle, quarter, or semester.</p>	<p>As a community, we review or create a schoolwide competency roadmap to ensure all teachers know which competencies they need to teach and when.</p>	<p>As a community, we review or create a schoolwide competency roadmap to ensure all teachers know which competencies they need to teach and when. We also identify places for additional competency opportunities.</p>

LC.4 Ensure High Quality Instruction and Learning Experiences

I can ensure that learning experiences provide students with opportunities to be exposed to high quality instruction aligned to the competencies, to engage in real-world learning, and to apply their learning to make an impact.

	Novice	Developing	Proficient	Expert/Mentor
<p>LC.4.4</p> <p>Ensure the use of competencies and continua</p>	<p>I do not have a process or way to monitor which competencies teachers are teaching and rating.</p> <p>I or someone from my team supports teachers in implementing competencies within their content area only.</p> <p>I inconsistently give feedback on the use and visibility of the competencies and continua as part of my walkthrough feedback form or protocol.</p>	<p>I am beginning to implement a system to monitor implementation of competencies by checking to see if teachers rated the competencies they were supposed to at the end of each learning cycle, quarter, or semester.</p> <p>I create a few opportunities for teachers to receive support in implementing and rating schoolwide competencies outside their content area (e.g., ELA across the curriculum, Project Quality, Collaboration, Building Networks).</p> <p>I understand the importance of revision and feedback in a competency model and am working with some teachers to build in opportunities for students to receive timely, specific, actionable, and continua-based feedback from adults and/or peers.</p> <p>I occasionally give feedback on the use and visibility of the competencies and continua as part of my walkthrough feedback form or protocol.</p> <p>I ask the teachers to work with individual students who want to submit evidence and receive competency ratings for student-designed projects and tasks completed outside of school.</p>	<p>I have systems in place to regularly monitor the implementation and rating of competencies by each teacher aligned to the roadmap.</p> <p>I create regular opportunities for teachers to receive support in implementing and rating schoolwide competencies that are outside their content area (e.g., ELA across the curriculum, Project Quality, Collaboration, Building Networks).</p> <p>I create a culture of revision and feedback in the school so all teachers provide some opportunities for students to receive timely, specific, actionable, and continua-based feedback from adults and peers.</p> <p>I consistently include feedback on the use and visibility of the competencies and continua as part of my walkthrough feedback form or protocol. I sometimes ask students which competencies they are working on and what levels they are trying to achieve on the continua.</p> <p>I ensure there is a process in place for students to submit evidence and receive competency ratings for student-designed projects and tasks completed outside of school.</p>	<p>I have systems in place to regularly monitor the implementation and rating of competencies by each teacher aligned to the roadmap and to the pacing in the studio milestone planner or pacing guide.</p> <p>I create regular opportunities for teachers to receive support in implementing and rating schoolwide competencies that are outside their content area (e.g., ELA across the curriculum, Project Quality, Collaboration, Building Networks). I identify a partner teacher, coach, or team to support teachers in the design, implementation, and rating of student work.</p> <p>I create a culture of revision and feedback in the school so all teachers provide multiple opportunities for students to receive timely, specific, actionable, and continua-based feedback from adults and peers.</p> <p>I consistently include feedback on the use and visibility of the competencies and continua as part of my walkthrough feedback form or protocol. I consistently ask students which competencies they are working on, what levels they are trying to achieve on the continua and specific indicators.</p> <p>I ensure there is a process in place for students to submit evidence and receive competency ratings for student-designed projects and tasks completed outside of school. I ensure there is a process created for adults outside of the school to submit ratings for students on appropriate competencies (e.g., Professionalism, Collaboration, Written Communication in the Workplace).</p>
<p>LC.4.5</p> <p>Ensure real world learning, impact, and strategic partnerships</p>	<p>I rarely support my staff in implementing real-world learning experiences.</p> <p>I ensure students have a few opportunities to demonstrate their learning.</p> <p>I am learning about our community and looking for opportunities to build relationships with key partners who can support our students in learning about careers in our local community.</p> <p>I provide students with a specific career opportunity to provide them with career exposure.</p>	<p>I am beginning to support my staff in implementing some real-world learning experiences..</p> <p>I ensure students have a few opportunities to implement their learning and make an impact on an authentic audience (e.g., exhibitions, school performances, events, publications, websites).</p> <p>I am beginning to build relationships with a few key community partners to provide students with opportunities to gain career exposure in our local community.</p> <p>I provide a select few opportunities for students to engage in career experiences based on their interests (e.g., internships, fellowships, mentorships, job shadowing, career challenges, certifications). I am beginning to create a variety of career experiences aligned to student interests.</p>	<p>I support my staff in implementing real-world learning experiences. I support my staff in building relationships with some community partners to connect their learning to the real world.</p> <p>I ensure students have some opportunities to implement their learning and make an impact on an authentic audience (e.g., exhibitions, school performances, events, publications, websites).</p> <p>I cultivate relationships with a few key community partners to co-design opportunities for students to gain career exposure to careers within the local community. I ensure student interest and local context (e.g., local career opportunities, in demand career fields) drive the design and development of the learning experiences.</p> <p>I ensure there are opportunities for students to engage in career experiences inside or outside the school (e.g., internships, fellowships, mentorships, job shadowing, career challenges, certifications). I support my school in finding community members to serve as mentors and coaches who can provide feedback and help students build personal and professional networks.</p>	<p>I support my staff in designing and implementing studios that provide authentic learning experiences that are realistic in scope, logistically sound, and grounded in real-world learning. I support my staff in building relationships with community partners to ensure students are exposed to a variety of careers and can connect their learning in the studio to the real world.</p> <p>I ensure students have regular and consistent opportunities to implement their learning and make an impact on an authentic audience (e.g., exhibitions, school performances, events, publications, websites).</p> <p>I cultivate relationships with a variety of community partners to co design opportunities for students to gain career exposure to careers within the community. I ensure student interest and local context (e.g., local career opportunities, in demand career fields) drive the design and development of the learning experiences.</p> <p>I ensure there are opportunities, within and outside of my school, to engage in a variety of career experiences aligned to their interests and passions (e.g., internships, fellowships, mentorships, job shadowing, career challenges, certifications). I support my school in finding community members to serve as mentors and coaches who can provide feedback and help students build personal and professional networks.</p>
<p>LC.4.6</p>	<p>I am working with my staff to determine how we can create some flexibility in our learning environments.</p> <p>I am working with my staff to identify the equipment, curriculum and technology needed to create a few specific personalized learning pathways aligned to postsecondary opportunities (e.g., 3D printer, digital cameras, engineering equipment, appropriate software).</p>	<p>I support my staff in creating some flexibility in our learning environments (e.g., purchasing adjustable furniture, installing retractable walls, creating flexible spaces).</p> <p>I support my staff in identifying possible funding sources (e.g., grants, community partners, donations) to purchase equipment, curriculum, and technology needed to create a few specific personalized learning pathways aligned to postsecondary opportunities (e.g., 3D printer, digital cameras, engineering equipment, appropriate software).</p>	<p>I support my staff in creating flexible learning environments by rethinking or repurposing space and/or resources (e.g., purchasing adjustable furniture, installing retractable walls, creating flexible spaces, creating large blocks of time to personalize schedules).</p> <p>I support my staff in securing funds (e.g., grants, community partners, donations) to purchase equipment, curriculum, and technology needed to create a few specific personalized learning pathways aligned to postsecondary opportunities (e.g., 3D printer, digital cameras, engineering equipment, appropriate software).</p>	<p>I support my staff in creating flexible learning environments by rethinking and repurposing time, space, and resources (e.g., purchasing adjustable furniture, installing retractable walls, creating flexible spaces, creating large blocks of time to personalize schedules).</p> <p>I support my staff in securing funds (e.g., grants, community partners, donations) to purchase equipment, curriculum, and technology necessary for creating a variety of personalized learning pathways aligned to postsecondary opportunities (e.g., 3D printer, digital cameras, engineering equipment, appropriate software).</p>

LC.4 Ensure High Quality Instruction and Learning Experiences

I can ensure that learning experiences provide students with opportunities to be exposed to high quality instruction aligned to the competencies, to engage in real-world learning, and to apply their learning to make an impact.

	Novice	Developing	Proficient	Expert/Mentor
Support teachers in creating a personalized learning environment	<p>I am seeking resources and support to provide my teachers with a few professional development opportunities to create safe and structured learning environments.</p> <p>I ensure teachers are provided with the professional support of our student support services leaders to differentiate and scaffold learning activities.</p> <p>I am learning how to support my teachers in the use of tools to collect, organize, and analyze competency performance data to inform daily instruction.</p>	<p>I provide teachers with a few professional development and/or coaching opportunities to create safe and structured learning environments that allow for the varied groupings required to facilitate learning (e.g. whole group, small group, one to one, independent group work, learner-designed experiences).</p> <p>I ensure teachers are provided with some professional development in addition to the professional support of our student support services leaders to differentiate and scaffold learning activities.</p> <p>I support teachers in the use of tools to collect, organize, and analyze competency performance data to inform daily instruction.</p>	<p>I ensure teachers are provided with ongoing professional development and coaching to create safe and structured learning environments that allow for the varied groupings required to facilitate learning (e.g. whole group, small group, one to one, independent group work, learner-designed experiences).</p> <p>I ensure teachers are provided with ongoing professional development and/or coaching, in addition to the professional support of our student support services leaders, to differentiate and scaffold learning activities so all students can access the content and engage in high-level thinking and learning.</p> <p>I ensure teachers regularly use tools to collect, organize, and analyze data from a variety of sources (e.g., competency performance levels and growth, behavior, attendance, formative assessments, standardized assessments) to inform daily instruction and personalize learning for students.</p>	<p>I ensure teachers are provided with ongoing and personalized professional development and coaching to create safe and structured learning environments that allow for the varied groupings required to facilitate learning (e.g. whole group, small group, one to one, independent group work, learner-designed experiences).</p> <p>I ensure teachers are provided with personalized professional development and coaching, in addition to the professional support of our student support services leaders to differentiate and scaffold learning activities so all students can access the content and engage in high-level thinking and learning.</p> <p>I ensure teachers regularly use tools to collect, organize, and analyze data from a variety of sources (e.g., competency performance levels and growth, behavior, attendance, formative assessments, standardized assessments) to inform daily instruction, personalize learning for students. I ensure teachers collaborate to identify correlations and trends across the data.</p>

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Authors: [Sandra Moutoutjis and Ayris Colvin from Building 21](#)

Sources: [New Leaders Principal Evaluation Handbook](#)

Last edited: 2019-08-17

LC.5 Build the Capacity of Others

I can contribute to and support the personal and professional growth of others.

	Novice	Developing	Proficient	Expert/Mentor
<p>LC.5.1</p> <p>Create a culture of high expectations and accountability</p>	<p>I have high expectations for some students and I am learning how to support all students and invest in their potential.</p> <p>I am learning about the inequitable systems and historical forms of oppression that shape perspectives, practices, and privileges.</p>	<p>I set high expectations for all students, share success metrics, and analyze and share data to ensure each member of the community understands these expectations.</p> <p>I am aware of inequitable systems and historical forms of oppression that shape perspectives, practices, and privileges. I sometimes engage in difficult conversations with others about barriers that prevent students from being able to access equitable opportunities and achieve at high levels.</p>	<p>I communicate clear and specific expectations for high student performance, set and share success metrics, and analyze and share data to ensure each member of the community understands these expectations. I sometimes hold members of my community accountable to high student expectations.</p> <p>I am beginning to address inequitable systems and historical forms of oppression that shape perspectives, practices, and privileges by engaging in difficult conversations with others about barriers that prevent students from being able to access equitable opportunities and achieve at high levels.</p>	<p>I regularly and consistently communicate clear and specific expectations for high student performance, set and share success metrics, and analyze and share data to ensure that each member of the community upholds these expectations. I hold members of my community accountable to high student expectations and hold all staff members accountable for their decisions and actions.</p> <p>I demonstrate the courage to tackle inequitable systems and historical forms of oppression that shape perspectives, practices, and privileges by engaging in difficult conversations, dismantling practices or policies and removing barriers that prevent students from being able to access equitable opportunities and achieve at high levels.</p>
<p>LC.5.2</p> <p>Create opportunities for collaboration and team building</p>	<p>I am working with others to create a schedule that allows time for collaboration.</p> <p>I need support to create an environment where my staff feel comfortable to share their thoughts and actively listen to each other. Many conflicts occur and I need support in learning how to help manage and resolve conflicts.</p> <p>I provide one or two opportunities at the beginning of the year (e.g., team building, story telling, share who you are) for staff to get to know each other.</p> <p>I am working on establishing norms to use with my staff.</p>	<p>I have created some time for collaboration in the school schedule and am working on creating a schedule with regular time for collaboration.</p> <p>I am working on creating an environment where my staff feels comfortable to freely express themselves and actively listen to each other. When conflicts arise, staff members often come to me to intervene in the conflict. I am working on creating a process or protocol to manage and resolve conflicts (e.g., restorative process, 5 step process).</p> <p>I provide a few opportunities throughout the year (e.g., team building, story telling, share who you are) for staff to get to know each other.</p> <p>I ensure norms have been established. I am working on making sure our norms are visible, we review them consistently, and begin to hold each other accountable.</p>	<p>I prioritize time for collaboration in the school schedule, provide resources and support, and am working on holding my staff accountable for using their time effectively.</p> <p>I create an environment where some of my staff feel comfortable to freely express themselves, actively listen to others, and welcome and value different perspectives, in order to collaborate and work effectively together. When conflicts arise that needs intervention, I ensure there is a process or protocol in place for myself or others to manage and resolve conflicts (e.g., restorative process, 5 step process).</p> <p>I ensure staff has multiple opportunities throughout the year (e.g., team building, story telling, share who you are) to get to know each other, to build trust and and foster empathy, so people can genuinely engage with each other, work through difficulties, and manage conflict productively.</p> <p>I ensure norms have been established. I ensure we make our norms visible, review them consistently, and hold each other accountable to following them.</p>	<p>I prioritize time for collaboration in the school schedule, provide resources and support, and hold my staff accountable for using their time effectively.</p> <p>I create an environment where most members of my staff feel comfortable to freely express themselves, actively listen to others, and welcome and value different perspectives, in order to collaborate and work effectively together. My staff is able to engage in productive conflict as well as follow a process or protocol to manage and resolve conflicts (e.g., restorative process, 5 step process).</p> <p>I ensure staff has regular and ongoing opportunities (e.g., team building, story telling, share who you are) to get to know each other, to build trust and foster empathy so people can genuinely engage with each other, work through difficulties, and manage conflict productively.</p> <p>I ensure there is a collaborative process for establishing norms. I ensure we make our norms visible, review them consistently, and hold each other accountable to following them.</p>
<p>LC.5.3</p> <p>Distribute leadership</p>	<p>I provide limited opportunities for a select few members of my staff to engage in school leadership experiences.</p> <p>I am working on creating or improving my leadership team.</p>	<p>I provide a few opportunities for my staff to engage in school leadership experiences (e.g., community projects, tasks, committees, initiatives, etc.) that provide them a sense of ownership, voice and professional development.</p> <p>I select members from my staff for my leadership team and I am building their understanding of the vision and expectations for the leadership team.</p> <p>I am beginning to identify members of my staff who are interested in pursuing leadership opportunities.</p>	<p>I create a process to provide some opportunities for my staff to engage in school leadership experiences (e.g., community projects, tasks, committees, initiatives) that provide them with a sense of ownership, voice, and personal and professional development.</p> <p>I have a vision and process for developing a leadership team made of diverse staff members with a range of skill sets. I support them in overseeing projects and solving complex problems.</p> <p>I mentor and support aspiring leaders and provide them with a variety of experiences to develop leadership skills.</p>	<p>I create a process to provide regular and consistent opportunities for my staff to engage in school leadership experiences (e.g., community projects, tasks, committees, initiatives) that provide them with a sense of ownership, voice, and personal and professional development. I provide a process for my staff to recommend or develop their own leadership opportunities.</p> <p>I have a vision and process for developing, training, and supporting an effective leadership team made of diverse staff members with a range of skill sets. I empower them to oversee projects and to solve complex problems while coaching them to effectively lead others.</p> <p>I mentor and support aspiring leaders and provide them with a variety of experiences to develop leadership skills. I provide pathways to leadership for aspiring leaders and create a process that outlines expectations, guideposts, and opportunities for future leadership roles.</p>
<p>LC.5.4</p> <p>Support the personal and professional development of staff</p>	<p>I use the district allocated days and/or create a few additional opportunities throughout the year to engage staff in professional development.</p> <p>I am working on outlining a professional learning plan that supports our school-wide goals and innovative initiatives.</p> <p>I develop or rely on others to provide opportunities for professional learning.</p> <p>I am working on creating a process to use the teacher and leader competencies.</p>	<p>I create regular opportunities each month for my staff to engage in meaningful personal and professional development opportunities.</p> <p>I outline and begin to implement a professional learning plan that supports our school-wide goals and innovative initiatives.</p> <p>I design and seek out others to provide opportunities for professional learning. I am working on improving the quality and content of professional learning to ensure it meets the needs of my staff.</p> <p>I create a process for self-reflection and goal setting on the teacher and leader competencies.</p>	<p>I create regular opportunities each week for my staff to engage in meaningful personal and professional development opportunities.</p> <p>I outline and implement a professional learning plan that supports school-wide goals and innovative initiatives and sometimes provide choice and/or differentiated opportunities based on individual staff needs.</p> <p>I design and seek out others to provide high-quality personal and professional learning opportunities, ensuring they are facilitated to meet the needs of my staff and improve student outcomes. I am working on creating more personalized opportunities for my staff.</p> <p>I create a process for self-reflection and goal setting on the teacher and leader competencies, as well as regular opportunities for feedback and reflection to create a safe culture for risk-taking and innovation.</p>	<p>I create regular and sacred or protected opportunities each week for my staff to engage in meaningful personal and professional development opportunities.</p> <p>I outline and implement a professional learning plan that supports school-wide goals and innovative initiatives, regularly provide choice and/or differentiated opportunities based on individual staff needs.</p> <p>I design and seek out others to provide personalized and high-quality personal and professional learning opportunities, ensuring they are facilitated effectively to meet the needs of my staff and improve student outcomes.</p> <p>I create a process for self-reflection and goal setting on the teacher and leader competencies, as well as regular opportunities for feedback, reflection, and sharing of our successes and failures, to create a safe culture for risk-taking and innovation.</p>

LC.5 Build the Capacity of Others

I can contribute to and support the personal and professional growth of others.

	Novice	Developing	Proficient	Expert/Mentor
	I am learning about various resources (e.g., Myers-Briggs, Johari window, conflict styles assessment) in order to provide opportunities for staff to learn more about themselves and how they engage with others.	I provide a few opportunities for staff to learn more about themselves and how they engage with others (e.g., Myers-Briggs, Johari window, conflict styles assessment).	I provide regular opportunities for staff to learn more about themselves and how they engage with others (e.g., Myers-Briggs, Johari window, conflict styles assessment) to support relationship building, healthy conflict, problem solving, and innovation.	I provide regular opportunities for staff to learn more about themselves and how they engage with others (e.g., Myers-Briggs, Johari window, conflict styles assessment) and consistently incorporate the language and the learning from these opportunities to support relationship building, healthy conflict, problem solving, and innovation.
LC.5.5 Implement a personalized coaching model	I am learning about coaching practices and need support with developing a coaching model.	I am beginning to develop a coaching model and I have started to identify teachers who need coaches.	I develop and implement a coaching model that sets clear expectations, is informed by data, is aligned to the teacher and leader competencies, and includes a consistent observation and feedback cycle.	I develop and consistently implement a strengths-based and personalized coaching model that clearly sets expectations, is informed by data, is aligned to the teacher and leader competencies, includes a consistent observation and feedback cycle, and monitors the progress of staff in meeting their goals.
	I am learning about different processes for coaching.	I am beginning to create a coaching process with my staff that is collaborative, highlights areas of strength and determines areas for growth, and identifies supports and next steps for reaching goals.	I engage in a coaching process with my staff that is collaborative, highlights areas of strength, determines areas for growth, and identifies supports and next steps for reaching goals.	I engage in an inquiry-based coaching process with my staff to better understand their perspectives, collaborate to identify the right supports to meet their needs, and identify next steps for reaching their goals. I create a process for receiving ongoing feedback to improve the coaching experience and process.
	My instructional leader and/or I conduct required formal and some informal observations and provide feedback through post observations.	I ensure my instructional leaders and coaches conduct formal and informal observations. I am working on supporting my coaches with using data to inform coaching.	I ensure my instructional leaders and coaches conduct regular and consistent formal and informal observations. I am working on supporting my coaches with using data and balancing challenge and support. (e.g., encouraging staff to try something new, providing struggling staff with improvement plans, arranging peer observations).	I build the capacity of my instructional leaders coaches to conduct regular and consistent formal and informal observations, collect and analyze data , and balance challenge and support. (e.g., encouraging staff to try something new, providing struggling staff with improvement plans, arranging peer observations).
	I am working to identify some high-leverage coaching strategies to use with my staff.	I utilize some high-leverage coaching strategies and I am working with my team on developing the knowledge and tools to become effective coaches.	I utilize some high leverage coaching strategies and I ensure all coaches have the knowledge and tools (e.g., walkthrough forms, data dashboards, community resources, goal setting templates, teacher competencies) to implement the coaching model to support staff in strengthening their practice and improving student outcomes.	I regularly and consistently utilize high leverage coaching strategies and I ensure all coaches have the knowledge and tools (e.g., walkthrough forms, data dashboards, community resources, goal setting templates, teacher competencies) to implement the coaching model to support staff in strengthening their practice and improving student outcomes. I provide opportunities for coaches to co-observe staff to norm coaching across the team.

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Authors: [Sandra Moumoutjis and Ayris Colvin from Building 21](#)

Sources: [JFF Personalized Learning Leadership competencies](#)

19-20 Michigan Principal Competencies

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LC.6 Make Data-Driven Decisions to Support a Continuous Improvement Process

I can use data to make strategic and high level decisions focused on positive student outcomes.

	Novice	Developing	Proficient	Expert/Mentor
<p>LC.6.1</p> <p>Create and monitor a strategic plan and goals</p>	<p>I need support gathering and analyzing data to develop a strategic plan.</p> <p>I need support in setting school goals and priorities in my strategic plan.</p> <p>I need support outlining actions steps, milestones, and strategies for the implementation of my strategic plan.</p>	<p>I gather and analyze data to develop a strategic plan.</p> <p>I implement my strategic plan aligned to school goals and priorities.</p> <p>I work collaboratively with my staff to outline actions steps, milestones and strategies for implementing my strategic plan and I monitor my data and make adjustments a few times a year.</p> <p>I invest my leadership team in the shared ownership of the strategic plan by transparently outlining their roles and responsibilities for executing and monitoring the plan.</p>	<p>I collaborate with my staff to gather and analyze multiple sources of data to develop a detailed strategic plan.</p> <p>I engage my staff in developing, implementing, and owning a detailed strategic plan aligned to school goals and priorities.</p> <p>I work collaboratively with my staff to outline actions steps, milestones and strategies for implementing our strategic plan and we frequently monitor our data and our progress toward our goals.</p> <p>I invest my staff in the shared ownership of the strategic plan by transparently outlining their roles and responsibilities for executing and monitoring the plan.</p>	<p>I collaborate with my staff to gather and analyze multiple sources of data to develop a detailed strategic plan.</p> <p>I engage my staff in developing, implementing, and owning a detailed strategic plan aligned to school goals and priorities.</p> <p>I work collaboratively with my staff to outline actions steps, milestones and strategies for implementing our strategic plan and we frequently monitor our data and our progress toward our goals.</p> <p>I invest my staff in the shared ownership of the strategic plan by transparently outlining their roles and responsibilities for executing and monitoring the plan.</p>
<p>LC.6.2</p> <p>Create systems to collect data and monitor implementation</p>	<p>I am working on identifying the systems we are using, what data is being collected, and what data we need to collect as I am working on my strategic plan (e.g., stakeholder feedback, attendance, behavior, competency-tracking, MTSS, credits).</p> <p>I am working on implementing a few of the data dashboards that have been created for leaders, staff, students, and families (e.g. student progress report, teacher progress lookup).</p> <p>I am learning about the systems we are using and am relying on others to provide the training and support for staff, students, and families.</p> <p>I am learning about the systems we are using and beginning to identify data we need from these different systems.</p>	<p>I am working on identifying which systems are in place and which systems we still need to ensure we are collecting all relevant data identified in my strategic plan (e.g., stakeholder feedback, attendance, behavior, competency-tracking, MTSS, credits).</p> <p>I implement some of the data dashboards or overviews that have been created for leaders, staff students, and families (e.g., admin compass, behavior and attendance dashboard, ratings dashboard, progress lookup, graduation tracker, PLP). I am working on identifying necessary, additional data dashboards and overviews.</p> <p>I am supporting staff, students, and families in using systems, dashboards or data overviews by providing professional development and training.</p> <p>I am identifying data we need from other systems and am starting to work with staff, the IT team, platform providers, and outside developers to integrate data from these systems.</p>	<p>I ensure systems are in place and collaborate to develop systems that do not exist to collect all relevant data identified in my strategic plan (e.g., stakeholder feedback, attendance, behavior, competency-tracking, MTSS, credits).</p> <p>I ensure data dashboards or overviews are created and implemented for all leaders, staff students, and families to easily view relevant student level, school wide or district wide data (e.g., admin compass, behavior and attendance dashboard, ratings dashboard, progress lookup, graduation tracker, PLP). I collect some feedback on the ease of use and effectiveness of the data dashboards and overviews in order to make improvements or design new dashboards.</p> <p>I ensure systems, dashboards or data overviews are utilized by providing professional development and training and providing ongoing support as needed for all relevant stakeholders.</p> <p>I work with staff, the IT team, platform providers, and outside developers to integrate data from multiple systems to provide easy-to-use and transparent dashboards for all stakeholders.</p>	<p>I ensure systems are in place and collaborate to develop systems that do not exist to collect all relevant data identified in my strategic plan (e.g., stakeholder feedback, attendance, behavior, competency-tracking, MTSS, credits). I consistently evaluate our systems for efficiency and effectiveness and make changes as needed.</p> <p>I ensure data dashboards or overviews are created and implemented for all leaders, staff, students, and families to easily view relevant student level, school wide and district wide data (e.g., admin compass, behavior and attendance dashboard, ratings dashboard, progress lookup, graduation tracker, PLP). I regularly collect feedback on the ease of use and the effectiveness of the data dashboards and overviews in order to make improvements or design new dashboards.</p> <p>I ensure systems, dashboards or data overviews are consistently and effectively utilized by providing professional develop and training, monitoring use, and providing ongoing support as needed for all relevant stakeholders.</p> <p>I build the capacity of others to lead and effectively and efficiently work with staff, the IT team, platform providers, and outside developers to integrate data from multiple systems to provide easy to use and transparent dashboards for all stakeholders.</p>
<p>LC.6.3</p> <p>Analyze and make use of data for continuous improvement</p>	<p>I am becoming familiar with the types of data we are collecting, how to access and review that data, and what that data means.</p> <p>I am learning how to analyze and share relevant data with my staff.</p> <p>I am working with my leadership team to identify relevant data to support staff in setting goals for personal and professional development.</p> <p>I am beginning to look at our data aligned to our school or district metrics to monitor our progress and identify areas of success and areas for improvement.</p>	<p>I analyze my school's data and am working with my leadership team to ensure everyone knows how to access and understand all of the data we collect and I am creating a process for the team to review and analyze the data.</p> <p>I am beginning to create a data-driven culture where we individually and/or collaboratively analyze data (e.g., competency performance levels and growth, behavior, attendance, formative assessments, standardized assessments) to make decisions and to design and implement interventions to improve outcomes.</p> <p>I am working with my leadership team to create a process to engage staff in data-based conversations to discuss self assessment on the teacher and leader competencies and supporting staff in setting goals for personal and professional growth and development.</p> <p>I am starting to work with my leadership team to analyze our data against our school or district metrics to monitor our progress, identify areas of success and areas in need of improvement, and make data-informed decisions about the implementation of our innovations.</p>	<p>I analyze my school's data and have a process in place for my leadership team to regularly review all relevant data to make decisions, implement interventions, and plan for professional development to meet the needs of my staff.</p> <p>I ensure my staff individually and/or collaboratively analyzes data (e.g., competency performance levels and growth, behavior, attendance, formative assessments, standardized assessments) to make decisions, and to design and implement interventions to improve outcomes for all students by providing them with a variety of training, tools, and resources (e.g., protocols, time, access to data dashboards).</p> <p>My leadership team and I engage staff in data-based conversations to discuss self-assessment on the teacher or leader competencies, review and revise goals, analyze data, and reflect upon progress to support personal and professional growth and development.</p> <p>I collaborate with my leadership team to regularly and consistently analyze our data against our school or district metrics to monitor our progress, identify areas of success and areas in need of improvement, and make data-informed decisions about the implementation of our innovations.</p> <p>I can transparently communicate student progress, growth, and postsecondary readiness and make relevant data (e.g., student PLP's, LMS, Parent Portal) available to all students and families. I share relevant data with additional stakeholders as requested.</p>	<p>I regularly and consistently analyze my school's data and have a process and protocols in place for my leadership team to effectively and efficiently review all relevant data to make decisions, implement interventions, and plan for professional development to meet the needs of my staff.</p> <p>I ensure my staff, individually and collaboratively, regularly and consistently analyze a variety of data (e.g., competency performance levels and growth, behavior, attendance, formative assessments, standardized assessments) to make decisions, and to design and implement interventions to improve outcomes for all students by providing them with a variety of training, tools, and resources (e.g., protocols, time, data dashboards).</p> <p>My leadership team and I regularly and consistently engage staff in data-based conversations to discuss self-assessment on the teacher or leader competencies, review and revise goals, analyze data, and reflect upon progress to support personal and professional growth and development.</p> <p>I collaborate with my staff to regularly and consistently analyze our data against our school or district metrics to monitor our progress, identify areas of success and areas in need of improvement, and make data-informed decisions about the implementation of our innovations.</p>
<p>LC.6.4</p>	<p>I am learning how to effectively communicate student progress, growth, and postsecondary readiness and I am identifying the data I need to make available to stakeholders.</p>	<p>I am beginning to communicate student progress, growth, and postsecondary readiness and make some relevant data (e.g., student PLP's, LMS, Parent Portal) available to students and families.</p>	<p>I can transparently communicate student progress, growth, and postsecondary readiness and make relevant data (e.g., student PLP's, LMS, Parent Portal) available to all students and families. I share relevant data with additional stakeholders as requested.</p>	<p>I can effectively and transparently communicate student progress, growth, and postsecondary readiness, tailored to my specific audience (e.g., students, families, teachers, staff, district/charter leadership and the broader community) and ensure all relevant data (e.g., student PLP's, LMS, Parent Portal) is available for all stakeholders in a regular and timely fashion.</p>

LC.6 Make Data-Driven Decisions to Support a Continuous Improvement Process

I can use data to make strategic and high level decisions focused on positive student outcomes.

	Novice	Developing	Proficient	Expert/Mentor
Transparently share relevant data with stakeholders	I share my school plan, goals, and progress as required or requested.	I am learning how to be more effective and transparent in communicating my overall school plan, goals, and progress.	I can transparently communicate our overall school plan, goals, and progress and I support stakeholders in understanding and interpreting school data accurately (e.g., adding clear and concise explanations, holding a community meeting to discuss the data, district leadership data review meetings).	I can effectively and transparently communicate our overall school plan, goals and progress, tailored to a specific audience (e.g., students, families, teachers, staff, district/charter leadership and the broader community) and I support all stakeholders in understanding and interpreting school data accurately (e.g., adding clear and concise explanations, holding a community meeting to discuss the data, district leadership data review meetings).
	I am learning more about our curricular resources and ways to share them with stakeholders.	I make curricular resources available as required or requested.	I make some curricular resources available and continue to add to the available resources.	I ensure relevant curricular resources are available to all stakeholders (e.g., students, families, teachers, district leaders).

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Sources:

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building21 : All Competencies and Skills

Competency Framework

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Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals	Cross MyWays Connections	Portrait of a Graduate Alignment
Area	ELA	English Language Arts					
Competency	ELA.1	Read Critically	I can read and critique diverse texts (e.g., books, films, advertising, music, social media, news websites).				
Skill	ELA.1.1	Choose and apply reading strategies	How well can I apply reading strategies to make meaning of texts?	CCSS.ELA-LITERACY.CCRA.R.10 CCSS.ELA-LITERACY.CCRA.L.4 CCSS.ELA-LITERACY.RH.4	MFL.1 Building the academic core MFL.2 Critical readers.	CK.1 English Core	Content Knowledge
Skill	ELA.1.2	Evaluate the main ideas or themes	How well can I analyze the main idea or central theme?	CCSS.ELA-LITERACY.CCRA.R.1 CCSS.ELA-LITERACY.CCRA.R.2 CCSS.ELA-LITERACY.CCRA.R.3 CCSS.ELA-LITERACY.CCRA.R.8	MFL.1 Building the academic core MFL.2 Critical readers.	CK.1 English Core CK.4 Interdisciplinary and Global Knowledge	Content Knowledge
Skill	ELA.1.3	Analyze context, point of view, and purpose	How well do I account for the role of point of view and author's purpose in shaping the text?	CCSS.ELA-LITERACY.CCRA.R.6	MFL.1 Building the academic core MFL.2 Critical readers. OTUW.1 Sense-makers—dealing v	CK.1 English Core CKH.4 Information, Media, and Technology Skills	Content Knowledge
Skill	ELA.1.4	Analyze craft	How well can I evaluate the effectiveness of the techniques and tools the author uses?	CCSS.ELA-LITERACY.CCRA.R.4 CCSS.ELA-LITERACY.CCRA.R.5 CCSS.ELA-LITERACY.CCRA.R.7 CCSS.ELA-LITERACY.CCRA.L.5	MFL.1 Building the academic core MFL.2 Critical readers.	CK.1 English Core	Content Knowledge
Competency	ELA.2	Express Ideas	I can clearly and effectively express my ideas (in written and oral form) for particular purposes and audiences, using diverse formats and settings to inform, persuade, and connect with others.	CCSS.ELA-LITERACY.CCRA.W.10			
Skill	ELA.2.1	Identify a core message and audience	How well do I identify my core message and audience?	CCSS.ELA-LITERACY.CCRA.W.4	MFL.1 Building the academic core MFL.3 Compelling writers. OTUW.3 Creative thinkers—refram GCTP.3 Inquisitive world citizens v	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.2.2	Develop and organize the message	How well do I develop and organize my message?	CCSS.ELA-LITERACY.CCRA.W.4	MFL.1 Building the academic core MFL.3 Compelling writers. OTUW.1 Sense-makers—dealing v	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.2.3	Prepare the medium	How well do I make decisions about format and features that are best for my audience?	CCSS.ELA-LITERACY.CCRA.W.4 CCSS.ELA-LITERACY.CCRA.R.7 CCSS.ELA-LITERACY.SL.5	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.4 Information, Media, and Technology Skills	Communication, Content Knowledge
Skill	ELA.2.4	Finalize, practice and/or prepare	How well do I practice and prepare?	CCSS.ELA-LITERACY.CCRA.W.5 CCSS.ELA-LITERACY.CCRA.L.1 CCSS.ELA-LITERACY.CCRA.L.2	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.2.5	Engage, respond, and reflect	How well can I answer questions and reflect on both my process and final product?	Building 21 Original Content	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Competency	ELA.3	Compose Evidence-based Arguments	I can compose evidence-based arguments to support claims in an analysis of substantive topics or texts using valid reasoning and relevant and sufficient evidence.	CCSS.ELA-LITERACY.CCRA.W.1			
Skill	ELA.3.1	Introduce claims	How well do I introduce my claim?	CCSS.ELA-LITERACY.W.1.A	MFL.1 Building the academic core MFL.3 Compelling writers. OTUW.1 Sense-makers—dealing v	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.3.2	Use evidence to develop claims and counterclaims	How well do I develop my claim and counterclaims?	CCSS.ELA-LITERACY.W.1.B	MFL.1 Building the academic core MFL.3 Compelling writers. OTUW.1 Sense-makers—dealing v	CK.1 English Core CKH.3 Communication and Collaboration CKH.4 Information, Media, and Technology Skills	Communication, Content Knowledge
Skill	ELA.3.3	Use words and transitions to create cohesion	How well do I use transitions to connect my ideas?	CCSS.ELA-LITERACY.W.1.C	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.3.4	Use a formal style, objective tone, and advanced vocabulary	How well do I use vocabulary and maintain a formal style and objective tone?	CCSS.ELA-LITERACY.W.1.D CCSS.ELA-LITERACY.CCRA.L.1 CCSS.ELA-LITERACY.CCRA.L.2 CCSS.ELA-LITERACY.CCRA.L.6	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.3.5	Provide a compelling conclusion	How effectively do I conclude my argument?	CCSS.ELA-LITERACY.W.1.E	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.3.6	Strengthen writing through revision	How well do I strengthen my writing through a revision process?	CCSS.ELA-LITERACY.CCRA.W.5 CCSS.ELA-LITERACY.CCRA.L.1 CCSS.ELA-LITERACY.CCRA.L.2	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core HOS.4 Learning Strategies	Communication, Content Knowledge



Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Competency	ELA.4	Write Informative Texts	I can write informative texts to examine and convey complex ideas and information clearly and accurately through the effective selection, organization, and analysis of content.	CCSS.ELA-LITERACY.CCRA.W.2			
Skill	ELA.4.1	Introduce the topic	How well do I introduce my topic?	CCSS.ELA-LITERACY.W.2.A	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.4.2	Develop the main idea with key points	How well do I develop key points and evidence to support my main idea?	CCSS.ELA-LITERACY.W.2.B	MFL.1 Building the academic core MFL.3 Compelling writers. OTUW.1 Sense-makers—dealing v	CK.1 English Core CKH.3 Communication and Collaboration CKH.4 Information, Media, and Technology Skills	Communication, Content Knowledge
Skill	ELA.4.3	Use words and transitions to create cohesion	How well do I use words and transitions to create cohesion?	CCSS.ELA-LITERACY.W.2.C	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.4.4	Use a formal style, objective tone, and advanced vocabulary	How well do I use vocabulary and maintain a formal style and objective tone?	CCSS.ELA-LITERACY.W.2.D CCSS.ELA-LITERACY.W.2.E CCSS.ELA-LITERACY.CCRA.L.1 CCSS.ELA-LITERACY.CCRA.L.2 CCSS.ELA-LITERACY.CCRA.L.6	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration CKH.4 Information, Media, and Technology Skills	Communication, Content Knowledge
Skill	ELA.4.5	Provide a compelling conclusion	How effective is my conclusion?	CCSS.ELA-LITERACY.W.2.F	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.4.6	Strengthen writing through revision	How well do I strengthen my writing through a revision process?	CCSS.ELA-LITERACY.CCRA.W.5 CCSS.ELA-LITERACY.CCRA.L.1 CCSS.ELA-LITERACY.CCRA.L.2	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core HOS.4 Learning Strategies	Communication, Content Knowledge
Competency	ELA.5	Write Narrative Texts	I can write narratives to develop real or imagined experiences or events using effective technique, well-chosen details and well-structured event sequences.	CCSS.ELA-LITERACY.CCRA.W.3			
Skill	ELA.5.1	Engage and orient the reader in the opening	How well do I engage and orient my reader in my opening?	CCSS.ELA-LITERACY.W.3.A	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.2 Creativity and Entrepreneurship CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.5.2	Develop the story and characters	How well do I develop my story and characters?	CCSS.ELA-LITERACY.W.3.B CCSS.ELA-LITERACY.W.3.C	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.2 Creativity and Entrepreneurship CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.5.3	Use words and phrases, details, and sensory language	How well do I use words to "paint a picture" for my audience?	CCSS.ELA-LITERACY.W.3.D CCSS.ELA-LITERACY.CCRA.L.5	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.2 Creativity and Entrepreneurship CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.5.4	Use words and transitions to create cohesion	How well do I use words, phrases, and transitions to create cohesion?	CCSS.ELA-LITERACY.W.3.C	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.5.5	Provide a compelling conclusion	How well does my conclusion flow from the story?	CCSS.ELA-LITERACY.W.3.E	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	ELA.5.6	Strengthen writing through revision	How well do I strengthen my writing through a revision process?	CCSS.ELA-LITERACY.CCRA.W.5 CCSS.ELA-LITERACY.CCRA.L.1 CCSS.ELA-LITERACY.CCRA.L.2	MFL.1 Building the academic core MFL.3 Compelling writers.	CK.1 English Core HOS.4 Learning Strategies	Communication, Content Knowledge
Competency	ELA.6	Engage in Discussion	I can participate in collaborative discussions, listen critically, and respond appropriately individually or in a group setting.	CCSS.ELA-LITERACY.SL.1			
Skill	ELA.6.1	Demonstrate preparedness and responsibility	How well do I participate in the discussion?	CCSS.ELA-LITERACY.SL.1A CCSS.ELA-LITERACY.SL.1B	MFL.1 Building the academic core OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram GCTP:1 Self-aware team member GCTP:2 Essential co-creators—ber	CK.1 English Core CKH.3 Communication and Collaboration	Collaboration, Communication, Content Knowledge



building21 : All Competencies and Skills

Competency Framework

ELA HOS HW MATH NGE PD PE SCI SS VA WF WL

Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Skill	ELA.6.2	Pose and respond to questions	How well do I pose and respond to questions?	CCSS.ELA-LITERACY.SL.1C	MFL.1 Building the academic core OTUW.2 Generative thinkers—crea GCTP:1 Self-aware team member GCTP:2 Essential co-creators—be	CK.1 English Core CKH.3 Communication and Collaboration	Collaboration, Communication, Content Knowledge
Skill	ELA.6.3	Reflect on new learning	How well can I reflect on the content of the discussion?	Building 21 Original Content	MFL.1 Building the academic core GCTP:1 Self-aware team member	CK.1 English Core CKH.3 Communication and Collaboration	Content Knowledge
Competency	ELA.7	Conduct Research	I can frame and advance an inquiry to investigate topics, build knowledge, and analyze and integrate information.				
Skill	ELA.7.1	Construct a research question	How well do I construct my primary question?	CCSS.ELA-LITERACY.CCRA.W.7	MFL.1 Building the academic core	CK.1 English Core	Content Knowledge
Skill	ELA.7.2	Identify and select credible, diverse sources to gather evidence	How well can I identify and select credible, diverse sources?	CCSS.ELA-LITERACY.CCRA.W.8	MFL.1 Building the academic core OTUW.1 Sense-makers—dealing v	CK.1 English Core CKH.4 Information, Media, and Technology Skills	Content Knowledge
Skill	ELA.7.3	Use systems to organize information gathered	How well do I organize information from my sources?	CCSS.ELA-LITERACY.CCRA.W.8	MFL.1 Building the academic core	CK.1 English Core CKH.4 Information, Media, and Technology Skills HOS.4 Learning Strategies	Content Knowledge
Skill	ELA.7.4	Synthesize multiple sources	How well can I evaluate and synthesize my findings?	CCSS.ELA-LITERACY.CCRA.W.9	MFL.1 Building the academic core MFL.3 Compelling writers. OTUW.2 Generative thinkers—crea	CK.1 English Core	Content Knowledge
Area	HOS	Habits of Success					
Competency	HOS.1	Manage My Work	I can demonstrate effective personal work habits to help me achieve my academic and personal goals.				
Skill	HOS.1.1	Manage tasks and deadlines	How well do I manage my tasks and deadlines?	Building 21 Original Content		HOS.1 Academic Behaviors	Conscientious
Skill	HOS.1.2	Set goals	How well do I set, achieve, and reflect on my goals?	Building 21 Original Content		WA.2 Identify Opportunities and Set Goals WA.5 Navigate Each Stage of the Journey HOS.4 Learning Strategies	
Skill	HOS.1.3	Organized and prepared	How well do I keep myself organized and come prepared to learn?	Building 21 Original Content		HOS.1 Academic Behaviors	Conscientious
Skill	HOS.1.4	Staying focused and on task	How well do I stay focused and on task?	Building 21 Original Content		HOS.1 Academic Behaviors HOS.2 Self-Direction and Perseverance	Conscientious
Skill	HOS.1.5	Improve my work	How well do I revise and improve my work?	Building 21 Original Content		HOS.4 Learning Strategies	Conscientious
Competency	HOS.2	Build Networks	I can build relationships with diverse individuals and expand my network of people who can help and support me.				
Skill	HOS.2.1	Build Relationships	How well do I build and maintain relationships to expand my network?	Building 21 Original Content	GCTP:1 Self-aware team member GCTP:3 Inquisitive world citizens	HOS.5 Social Skills and Responsibility	
Skill	HOS.2.2	Seek support and resources	How well do I seek out support and resources from my network?	Building 21 Original Content	GCTP:1 Self-aware team member	WA.4 Find Needed Help and Resources	
Skill	HOS.2.3	Create and maintain a positive digital/online footprint	How well do I maintain a positive digital footprint?	Building 21 Original Content	GCTP:1 Self-aware team member	HOS.5 Social Skills and Responsibility	Communication
Competency	HOS.3	Navigate My Setting	I can adhere to professional norms, effectively communicate and adapt to change in a variety of professional settings.				
Skill	HOS.3.1	Learn and follow professional norms	How well do I learn and follow professional norms?	Building 21 Original Content		CK.5 Career-Related Technical Skills HOS.1 Academic Behaviors	Adaptability
Skill	HOS.3.2	Communicate effectively	How effectively do I communicate with others?	Building 21 Original Content		CK.5 Career-Related Technical Skills CKH.3 Communication and Collaboration HOS.5 Social Skills and Responsibility	Adaptability, Communication
Skill	HOS.3.3	Flexibility and adaptability	How flexible and adaptable am I when changes need to be made?	Building 21 Original Content	OTUW.2 Generative thinkers—crea	HOS.2 Self-Direction and Perseverance HOS.3 Positive Mindsets HOS.4 Learning Strategies	Adaptability
Area	HW	Health and Wellness					



building21 : All Competencies and Skills

Competency Framework

ELA HOS HW MATH NGE PD PE SCI SS VA WF WL

Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Competency	HW.1	Apply Knowledge of Health Concepts	I can apply knowledge of concepts related to health promotion and disease prevention to enhance my health.				
Skill	HW.1.1	Analyze the four dimensions of health	How well can I analyze the four dimensions of health?	GSP.HealthEd.1.B		CKH.5 Practical Life Skills	Content Knowledge
Skill	HW.1.2	Explain causes of health problems and solutions for prevention and reduction	How well can I explain causes of health problems and solutions for prevention and reduction?	GSP.HealthEd.1.C	OTUW.2 Generative thinkers—crea	CKH.5 Practical Life Skills	Content Knowledge
Skill	HW.1.3	Analyze key factors that impact health	How well can I analyze key factors that impact health?	GSP.HealthEd.1.D		CKH.5 Practical Life Skills	Content Knowledge
Skill	HW.1.4	Analyze developmental stages of life	How well can I analyze developmental stages of life?	GSP.HealthEd.1.E		CKH.5 Practical Life Skills	Content Knowledge
Competency	HW.2	Analyze Health Promotion and Risk Reduction	I can demonstrate the ability to practice health-enhancing behaviors and avoid or reduce health risks.				
Skill	HW.2.1	Evaluate health information, products, and services	How well can I evaluate different health information, products, and services?	GSP.HealthEd.2.A GSP.HealthEd.2.B		CKH.5 Practical Life Skills	Content Knowledge
Skill	HW.2.2	Demonstrate healthy practices and behaviors	How well do I demonstrate healthy practices and behaviors?	GSP.HealthEd.3.A	OTUW.1 Sense-makers—dealing v	CKH.5 Practical Life Skills HOS.2 Self-Direction and Perseverance HOS.5 Social Skills and Responsibility	Content Knowledge
Skill	HW.2.3	Demonstrate health risk reduction practices and behaviors	How well can I apply health risk reduction practices and behaviors?	GSP.HealthEd.3.B	OTUW.2 Generative thinkers—crea OTUW.3 Creative thinkers—refram	CKH.5 Practical Life Skills	Content Knowledge
Skill	HW.2.4	Evaluate the impact of cultural norms, public policy, and government regulation impact health	How do I make sense of the impact of cultural norms, public policy, and government regulation on health?	GSP.HealthEd.4.A	OTUW.2 Generative thinkers—crea OTUW.3 Creative thinkers—refram GCTP.3 Inquisitive world citizens v	CKH.5 Practical Life Skills	Content Knowledge
Skill	HW.2.5	Evaluate the impact of technology on health	How do I make sense of the impact of technology on health?	GSP.HealthEd.4.B		CKH.5 Practical Life Skills CKH.4 Information, Media, and Technology Skills	Content Knowledge
Competency	HW.3	Engage in Health Advocacy	I can demonstrate the ability to use interpersonal communication and advocacy skills; make decisions; and set goals to enhance my personal, family and community health.				
Skill	HW.3.1	Demonstrate effective communication skills to promote health	How well can I use effective communication skills to promote health?	GSP.HealthEd.5.A		CKH.5 Practical Life Skills	Communication, Content Knowledge, Contributors
Skill	HW.3.2	Influence and support others in healthy decision-making	How do I influence and support others in healthy decision-making?	GSP.HealthEd.5.B	OTUW.2 Generative thinkers—crea OTUW.3 Creative thinkers—refram GCTP.1 Self-aware team member	CKH.5 Practical Life Skills CKH.3 Communication and Collaboration	Communication, Content Knowledge, Contributors
Skill	HW.3.3	Enhance personal health through positive decision-making	How well can I enhance my health through positive decision-making?	GSP.HealthEd.5.C	OTUW.2 Generative thinkers—crea	CKH.5 Practical Life Skills	Content Knowledge
Skill	HW.3.4	Develop and analyze a personal health plan	How well can I develop and analyze a personal health plan?	GSP.HealthEd.5.D		CKH.5 Practical Life Skills HOS.4 Learning Strategies WA.2 Identify Opportunities and Set Goals	Content Knowledge
Area	MATH	Mathematics					
Competency	MATH.1	Use Mathematical Modeling to Solve Problems	I can apply mathematics to solve problems arising in everyday life, society, and the workplace.				
Skill	MATH.1.1	Ask questions	How well can I ask questions to help formulate math problems?	CCSS.MATH.PRACTICE.MP1			
Skill	MATH.1.2	Gather and organize information	How well can I gather and organize information to help me understand the problem?	CCSS.MATH.PRACTICE.MP2	MFL.1 Building the academic core MFL.4 Mathematical and numeric HFK.1 Curious people who are kn	CK.2 Math Core CKH.1 Critical Thinking and Problem Solving	Content Knowledge
Skill	MATH.1.3	Model the problem	How well can I represent the problem with a mathematical model?	CCSS.MATH.PRACTICE.MP4	MFL.1 Building the academic core MFL.4 Mathematical and numeric HFK.1 Curious people who are kn OTUW.2 Generative thinkers—crea	CK.2 Math Core CKH.1 Critical Thinking and Problem Solving	Content Knowledge
Skill	MATH.1.4	Generate, interpret, and evaluate results	How well can generate, interpret, and evaluate results of the model?	CCSS.MATH.PRACTICE.MP1 CCSS.MATH.PRACTICE.MP3 CCSS.MATH.PRACTICE.MP5 CCSS.MATH.PRACTICE.MP6	MFL.1 Building the academic core MFL.4 Mathematical and numeric HFK.1 Curious people who are kn OTUW.2 Generative thinkers—crea	CK.2 Math Core CKH.1 Critical Thinking and Problem Solving	Content Knowledge



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Competency Framework

ELA HOS HW MATH NGE PD PE SCI SS VA WF WL

Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Skill	MATH.1.5	Communicate and defend my solution	How well can I defend my solution and explain my process?	CCSS.MATH.PRACTICE.MP3	MFL.1 Building the academic core MFL.4 Mathematical and numeric	CK.2 Math Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	MATH.1.6	Reflect on my process and solution	How well can I reflect on what I learned through the problem solving process?	CCSS.MATH.PRACTICE.MP1	MFL.1 Building the academic core MFL.4 Mathematical and numeric	CK.2 Math Core CKH.3 Communication and Collaboration	Communication, Content Knowledge
Area	NGE	NextGen Essentials					
Competency	NGE.1	Design Solutions	I can plan, create, and implement a project in the world that has a positive impact on an authentic audience.				
Skill	NGE.1.1	Create a project plan	How well can I create a project plan?	Building 21 Original Content		CKH.1 Critical Thinking and Problem Solving HOS.1 Academic Behaviors	Conscientious
Skill	NGE.1.2	Create a high quality project	How well do I follow guidelines to create a high quality product?	Building 21 Original Content	OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	CKH.2 Creativity and Entrepreneurship HOS.1 Academic Behaviors	Conscientious, Content Knowledge
Skill	NGE.1.3	Solve a real-world problem	How well do I create a product that solves a real-world problem and impacts an authentic audience?	21CLD.Real-world problem-solving and innovation	OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	CKH.1 Critical Thinking and Problem Solving CKH.2 Creativity and Entrepreneurship	Confidence, Content Knowledge, Contributors
Skill	NGE.1.4	Use technology	How well do I use technology to building knowledge and demonstrate my learning?	CCSS.ELA-LITERACY.CCRA.W.6 ISTE.Students.4 ISTE.Students.5 ISTE.Students.7	GCTP.1 Self-aware team members	CKH.4 Information, Media, and Technology Skills	
Skill	NGE.1.5	Reflect on my work and my impact	How well do I reflect on my work and on my impact?	Building 21 Original Content	OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	HOS.5 Social Skills and Responsibility	Confidence, Contributors
Competency	NGE.2	Present to an Audience	I can give purposeful and effective presentations in formal settings, making strategic and appropriate decisions about content, language use, and style based on the audience, venue, and topic.				
Skill	NGE.2.1	Introduce presentation	How well do I introduce my presentation?	CCSS.ELA-LITERACY.SL.4	MFL.1 Building the academic core	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	NGE.2.2	Present findings and supporting evidence	How well do I organize, present, and support my ideas?	CCSS.ELA-LITERACY.SL.4	MFL.1 Building the academic core	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	NGE.2.3	Customize the presentation for the specific purpose, context, and audience	How effectively do I customize my presentation for my specific purpose, context, and audience?	CCSS.ELA-LITERACY.SL.4	MFL.1 Building the academic core	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	NGE.2.4	Use presentation aids	How effectively do I use different media to communicate my ideas?	CCSS.ELA-LITERACY.SL.5	MFL.1 Building the academic core MFL.5 Data and visual thinkers.	CKH.3 Communication and Collaboration CKH.4 Information, Media, and Technology Skills	Communication, Content Knowledge
Skill	NGE.2.5	Use language and body movement effectively	How well do I use my words, voice and body language to engage my audience?	CCSS.ELA-LITERACY.SL.6	MFL.1 Building the academic core	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	NGE.2.6	Give an effective conclusion	How well do I conclude my presentation?	CCSS.ELA-LITERACY.SL.4	MFL.1 Building the academic core	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Competency	NGE.3	Collaborate Effectively	I can work effectively with diverse teams to create high quality products.				
Skill	NGE.3.1	Interact and participate effectively with others	How well do I interact and participate with others on my team?	CCSS.ELA-LITERACY.SL.1.B CCSS.ELA-LITERACY.SL.1.D	GCTP.1 Self-aware team members GCTP.2 Essential co-creators—be	CKH.3 Communication and Collaboration HOS.5 Social Skills and Responsibility	Adaptability, Collaboration, Communication
Skill	NGE.3.2	Complete my part of the work	How well do I complete my part of the work?	21CLD.Collaboration	GCTP.1 Self-aware team members GCTP.2 Essential co-creators—be	CKH.3 Communication and Collaboration HOS.1 Academic Behaviors	Collaboration, Communication
Skill	NGE.3.3	Manage and resolve conflicts	How well do I manage and work to resolve conflicts when working with others?	CCSS.ELA-LITERACY.SL.1.D	GCTP.1 Self-aware team members GCTP.2 Essential co-creators—be	CKH.3 Communication and Collaboration HOS.5 Social Skills and Responsibility	Collaboration, Communication, Conflict Resolution



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Competency Framework

ELA HOS HW MATH NGE PD PE SCI SS VA WF WL

Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Skill	NGE.3.4	Reflect on our product and process	How well do I reflect on how our team worked together and on my individual contributions to the team?	Building 21 Original Content	GCTP1 Self-aware team member GCTP2 Essential co-creators—ber	CKH.3 Communication and Collaboration WA.2 Identify Opportunities and Set Goals	Collaboration, Communication
Area	PD	Personal Development Self-reflection	IMPORTANT: Self-reflection not rated by teachers				
Competency	PD.1	Demonstrate Effective Effort	I can demonstrate a growth mindset in my approach to challenges, learning, and new opportunities.	MindsetWorks.Effective Effort Rubric			
Skill	PD.1.1	Take on challenges	How willing am I to take on challenges?	MindsetWorks.Effective Effort Rubric.1	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance HOS.3 Positive Mindsets	Confidence
Skill	PD.1.2	Learn from mistakes	How well do I learn from my mistakes?	MindsetWorks.Effective Effort Rubric.2	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance	Adaptability, Confidence
Skill	PD.1.3	Accept feedback and criticism	How well do I accept and apply constructive feedback?	MindsetWorks.Effective Effort Rubric.3	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance HOS.4 Learning Strategies	Adaptability, Collaboration, Confidence
Skill	PD.1.4	Practice and apply strategies	How well do I practice to improve and apply strategies to accomplish my goals?	MindsetWorks.Effective Effort Rubric.4	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance HOS.4 Learning Strategies	Confidence
Skill	PD.1.5	Persevere	How well to I keep trying even when things get hard?	MindsetWorks.Effective Effort Rubric.5	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance	Confidence
Skill	PD.1.6	Ask Questions	How well do I ask questions when I need help?	MindsetWorks.Effective Effort Rubric.6	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance HOS.4 Learning Strategies	Confidence
Skill	PD.1.7	Take Risks	How willing am I to take risks?	MindsetWorks.Effective Effort Rubric.7	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance HOS.3 Positive Mindsets	Confidence
Competency	PD.2	Make Informed Decisions	I can demonstrate effective decision-making skills to help me achieve my academic and personal goals.				
Skill	PD.2.1	Identify the decision	How well do I identify decisions I need to make?	Building 21 Original Content	LFL.1 Self-driven, self-directed. Cu	WA.1 Survey the Learn, Work, and Life Landscapes WA.2 Identify Opportunities and Set Goals	
Skill	PD.2.2	Choose and apply decision making process	How well do I follow a decision making process?	Building 21 Original Content	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance WA.1 Survey the Learn, Work, and Life Landscapes WA.4 Find Needed Help and Resources	Confidence, Conscientious
Skill	PD.2.3	Take responsibility and determine consequences	How well do I think about consequences and personal responsibility?	Building 21 Original Content	LFL.1 Self-driven, self-directed. Cu	HOS.5 Social Skills and Responsibility CKH.5 Practical Life Skills	Confidence, Conscientious
Skill	PD.2.4	Communicate my decision	How well do I communicate my decisions?	Building 21 Original Content	LFL.1 Self-driven, self-directed. Cu	CKH.3 Communication and Collaboration	Communication, Confidence
Skill	PD.2.5	Reflect on my decisions	How well do I reflect on decisions I make?	Building 21 Original Content	LFL.1 Self-driven, self-directed. Cu	HOS.2 Self-Direction and Perseverance HOS.3 Positive Mindsets	Confidence, Conscientious
Competency	PD.3	Demonstrate Social Skills and Awareness	I can demonstrate the ability to show empathy, communicate well with others, handle conflict and manage my time on technology.				
Skill	PD.3.1	Recognize feelings and perspectives of others	How well can I recognize the feelings and perspectives of others?	Building 21 Original Content	GCTP1 Self-aware team member GCTP3 Inquisitive world citizens	HOS.5 Social Skills and Responsibility CKH.3 Communication and Collaboration	Adaptability, Collaboration, Communication
Skill	PD.3.2	Manage conflicts	How well do I recognize and manage conflicts in positive ways?	Building 21 Original Content	GCTP1 Self-aware team member GCTP3 Inquisitive world citizens	HOS.5 Social Skills and Responsibility CKH.3 Communication and Collaboration	Adaptability, Conflict Resolution



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Competency Framework

ELA HQS HW MATH NGE PD PE SCI SS VA WF WL

Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Skill	PD.3.3	Use strategies to resolve conflicts	How well do I use strategies to resolve conflicts?	Building 21 Original Content	OTUW.3 Creative thinkers—refram GCTP.1 Self-aware team member GCTP.3 Inquisitive world citizens	HOS.5 Social Skills and Responsibility CKH.3 Communication and Collaboration	Collaboration
Skill	PD.3.4	Manage time on technology	How well do I manage the time on spend on technology?	Building 21 Original Content		HOS.5 Social Skills and Responsibility CKH.3 Communication and Collaboration	
Area	PE	Physical Education					
Competency	PE.1	Analyze Physical Fitness Activities and Outcomes	Demonstrate and apply fitness concepts.				
Skill	PE.1.1	Use fitness data to establish personal health goals	I can evaluate information gained from health-related fitness assessments in order to establish personal fitness goals.	GSP.PE.2.A	MFL.1 Building the academic core	CKH.5 Practical Life Skills WA.2 Identify Opportunities and Set Goals CK.2 Math Core	Content Knowledge
Skill	PE.1.2	Develop and implement a fitness plan	I can develop and implement a personal fitness plan, from established goals, that applies the principles of fitness and training.	GSP.PE.2.B	MFL.1 Building the academic core	WA.3 Design and Iterate Prototype Experiences	Content Knowledge
Skill	PE.1.3	Track and analyze progress toward fitness goals	I can track and analyze progress toward fitness goals and make adjustments as needed to maximize progress and goal attainment.	GSP.PE.2.C	MFL.1 Building the academic core	CK.2 Math Core	Content Knowledge
Competency	PE.2	Demonstrate Personal and Social Skills	Demonstrate and explain responsible personal behavior and responsible social behavior in physical activity settings.				
Skill	PE.2.1	Demonstrate collaboration skills during physical activities	I can demonstrate key collaborative skills while participating in physical activities, such as giving and accepting constructive feedback, and ensuring respectful inclusion of peers in activities.	GSP.PE.3.A	MFL.1 Building the academic core	HOS.2 Self-Direction and Perseverance HOS.5 Social Skills and Responsibility CKH.3 Communication and Collaboration	Content Knowledge
Skill	PE.2.2	Demonstrate responsible behavior during physical activities	I can demonstrate responsible and ethical personal behavior while participating in physical activities.	GSP.PE.3.B	MFL.1 Building the academic core	HOS.3 Positive Mindsets HOS.5 Social Skills and Responsibility	Content Knowledge
Skill	PE.2.3	Evaluate impacts on safety during physical activities	I can predict how etiquette/safety rules improve games/activities, contribute to productive participation, and how environmental modifications can impact safety.	GSP.PE.3.C	MFL.1 Building the academic core	CKH.3 Communication and Collaboration	Content Knowledge
Competency	PE.3	Advance Health and Movement Performance	Demonstrate the fundamental and specialized motor skills and apply principles of movement for improved performance and health.				
Skill	PE.3.1	Improve movement performance	Apply knowledge of skill-related fitness (agility, balance, coordination, power, reaction time, speed) to movement performance and overall health.	PA.PE.10.5.12.A	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages CKH.5 Practical Life Skills	Content Knowledge
Skill	PE.3.2	Develop and strengthen motor skills	I can incorporate and synthesize knowledge of motor skill development concepts to improve the quality of motor skills.	PA.PE.10.5.12.B	MFL.1 Building the academic core	CKH.3 Communication and Collaboration CKH.5 Practical Life Skills	Content Knowledge
Skill	PE.3.3	Apply knowledge of the impacts of exercise	I can apply my knowledge of the interaction between the type and duration of exercise and their effects on the body to make informed choices about physical activities and exercise regimens that will help me achieve my fitness goals.	PA.PE.10.5.12.D	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration CKH.5 Practical Life Skills	Content Knowledge
Area	SCI	Science					
Competency	SCI.1	Lead Scientific Investigations	I can plan and carry out a scientific investigation.				
Skill	SCI.1.1	Ask a scientific question	How well can I ask a scientific question?	NGSS.SciencePractice.1	MFL.1 Building the academic core HFK.1 Curious people who are kn OTUW.2 Generative thinkers—crea	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Skill	SCI.1.2	Formulate a hypothesis	How well can I formulate a hypothesis?	NGSS.SciencePractice.3	MFL.1 Building the academic core HFK.1 Curious people who are kn OTUW.2 Generative thinkers—crea OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Skill	SCI.1.3	Define and analyze variables	How well can I define the variables?	NGSS.SciencePractice.3	MFL.1 Building the academic core HFK.1 Curious people who are kn OTUW.1 Sense-makers—dealing v	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration	Content Knowledge



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Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals	Cross MyWays Connections	Portrait of a Graduate Alignment
Skill	SCI.1.4	Plan and organize an investigation	How well can I plan an investigation?	NGSS.SciencePractice.3	MFL.1 Building the academic core HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages CKH.1 Critical Thinking and Problem Solving CKH.4 Information, Media, and Technology Skills	Content Knowledge
Skill	SCI.1.5	Organize & strengthen plan	How well can I strengthen my plan using feedback?	NGSS.SciencePractice.3	MFL.1 Building the academic core HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration	Content Knowledge
Skill	SCI.1.6	Carry out the experiment	How well can I test my prediction by carrying out my plan?	NGSS.SciencePractice.3	MFL.1 Building the academic core HFK.1 Curious people who are kn OTUW.1 Sense-makers—dealing v	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Skill	SCI.1.7	Iterate using results	How well can I reflect on my findings and think about next steps?	NGSS.SciencePractice.3	MFL.1 Building the academic core HFK.1 Curious people who are kn OTUW.1 Sense-makers—dealing v OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Competency	SCI.2	Analyze and Interpret Data	I can analyze and interpret data to construct evidence-based explanations.				
Skill	SCI.2.1	Make meaning of data collected	How well do I identify relationships and patterns?	NGSS.NGSS.SciencePractice.3.4	MFL.1 Building the academic core MFL.4 Mathematical and numeric MFL.5 Data and visual thinkers.	CK.2 Math Core CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Skill	SCI.2.2	Represent data	How well can I represent the data visually?	NGSS.NGSS.SciencePractice.3.1	MFL.1 Building the academic core MFL.4 Mathematical and numeric MFL.5 Data and visual thinkers.	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration	Communication, Content Knowledge
Competency	SCI.3	Develop and Use Models	I can develop and use models to make predictions about phenomena, analyze systems, and communicate ideas.				
Skill	SCI.3.1	Create a model to represent a system	How well can I create a model to represent an event or system?	NGSS.NGSS.SciencePractice.3.2	MFL.1 Building the academic core OTUW.2 Generative thinkers—cre	CK.3 Science, Social Studies, Arts, Languages CKH.1 Critical Thinking and Problem Solving	Content Knowledge
Skill	SCI.3.2	Use the model to communicate ideas	How well can I use a model to predict outcomes or test a hypothesis?	NGSS.NGSS.SciencePractice.3.2	MFL.1 Building the academic core OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	SCI.3.3	Evaluate and refine models	How well can I use my understanding of the limitations of the model to make it better?	NGSS.NGSS.SciencePractice.3.2	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Competency	SCI.4	Write Technical Reports	I can engage in polished, professional technical writing for a range of purposes.				
Skill	SCI.4.1	Construct evidence-based explanations	How well do I communicate my findings and use data to support my claims?	CCSS.ELA-LITERACY.WHST.1.A CCSS.ELA-LITERACY.WHST.1.B CCSS.ELA-LITERACY.WHST.1.C CCSS.ELA-LITERACY.WHST.2.A	MFL.1 Building the academic core MFL.3 Compelling writers.	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	SCI.4.2	Identify and use appropriate text structure	How well can I choose and apply the appropriate text structure for my purpose?	CCSS.ELA-LITERACY.WHST.2.D	MFL.1 Building the academic core MFL.3 Compelling writers.	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Skill	SCI.4.3	Follow writing conventions	How well did I follow writing conventions?	CCSS.ELA-LITERACY.WHST.1.C CCSS.ELA-LITERACY.WHST.1.D CCSS.ELA-LITERACY.WHST.2.A	MFL.1 Building the academic core MFL.3 Compelling writers.	CKH.3 Communication and Collaboration	Communication, Content Knowledge
Area	SS	Social Studies					
Competency	SS.1	Analyze Events	I can apply historical literacy skills to analyze events both in the past and present to identify enduring patterns and themes and to answer questions about the nature of change and continuity over time.				
Skill	SS.1.1	Evaluate context and causes	How well can I evaluate the context and causes of events in past and present?	CCSS.ELA-LITERACY.RH.1, CCSS.ELA-LITERACY.RH.2, CCSS.ELA-LITERACY.RH.3, CCSS.ELA-LITERACY.RH.9, D2.HIS.1, D2.HIS.5, D2.HIS.14, D2.HIS.15	MFL.1 Building the academic core HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge



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Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Skill	SS.1.2	Analyze intended and unintended outcomes	How well can I analyze the effects, both intended and unintended, of events in the past and the present?	D2.HIS.14			
Skill	SS.1.3	Analyze outcomes as either change, continuity, or both	How well can I make sense of outcomes as either change, continuity, or both?	CCSS.ELA-LITERACY.RH.1, CCSS.ELA-LITERACY.RH.2, CCSS.ELA-LITERACY.RH.3, CCSS.ELA-LITERACY.RH.9, D2.HIS.2, D2.HIS.7, D2.HIS.14, D2.HIS.15	MFL.1 Building the academic core HFK.1 Curious people who are kn OTUW.2 Generative thinkers—crea	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration	Civic Literacy, Content Knowledge
Competency	SS.2	Analyze People and Perspectives	I can analyze multiple perspectives from credible sources to understand events in the past and present and to evaluate the importance of individuals and groups in shaping those events.				
Skill	SS.2.1	Analyze historical sources	How well can I analyze historical sources?	CCSS.ELA-LITERACY.CCRA.R.9, CCSS.ELA-LITERACY.RH.5, CCSS.ELA-LITERACY.RH.6, CCSS.ELA-LITERACY.RH.8, D2.HIS.6, D2.HIS.8, D2.HIS.9, D2.HIS.10, D2.HIS.11, D2.HIS.12, D2.HIS.13	MFL.1 Building the academic core MFL.2 Critical readers. HFK.1 Curious people who are kn OTUW.1 Sense-makers—dealing v OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages CKH.4 Information, Media, and Technology Skills	Content Knowledge
Skill	SS.2.2	Analyze multiple perspectives	How well can I analyze factors that shaped perspectives of people in the past?	CCSS.ELA-LITERACY.RH.1, CCSS.ELA-LITERACY.RH.2, CCSS.ELA-LITERACY.RH.3, CCSS.ELA-LITERACY.RH.6, CCSS.ELA-LITERACY.RH.9, D2.HIS.4, D2.HIS.5	MFL.1 Building the academic core MFL.2 Critical readers. HFK.1 Curious people who are kn OTUW.3 Creative thinkers—refram GCTP.3 Inquisitive world citizens	CK.3 Science, Social Studies, Arts, Languages CKH.4 Information, Media, and Technology Skills	Content Knowledge
Skill	SS.2.3	Evaluate the importance of people's actions in shaping outcomes	How well can I evaluate the importance of people's actions in shaping historical events?	CCSS.ELA-LITERACY.RH.1, CCSS.ELA-LITERACY.RH.2, CCSS.ELA-LITERACY.RH.3, CCSS.ELA-LITERACY.RH.9, D2.HIS.3, D2.HIS.16	MFL.1 Building the academic core HFK.1 Curious people who are kn HFK.2 Engaged participants who OTUW.2 Generative thinkers—crea	CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge	Civic Literacy, Content Knowledge
Competency	SS.3	Make an Impact	I can analyze enduring problems to take individual or collective action to positively impact my community.				
Skill	SS.3.1	Make a Positive Impact on my Community	How well can I apply a range of deliberative and democratic procedures to make decisions and take action in my classroom, school, and out-of-school civic contexts?	D2.CIV.7, D2.CIV.8		CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge WA.1 Survey the Learn, Work, and Life Landscapes	
Skill	SS.3.2	Examine Enduring Problems	How well can I identify and investigate specific problems or issues in my local, national, or global community?	D2.CIV.11, D2.CIV.12, D4.6	HFK.2 Engaged participants who OTUW.2 Generative thinkers—crea OTUW.3 Creative thinkers—refram GCTP.3 Inquisitive world citizens	CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge WA.1 Survey the Learn, Work, and Life Landscapes	Civic Literacy, Content Knowledge
Skill	SS.3.3	Build Civic Knowledge	How well can I assess options for individual and collective action to address local, regional, and global problems?	D2.CIV.1, D2.CIV.2, D2.CIV.3, D2.CIV.4, D2.CIV.5, D2.CIV.13, D2.CIV.14, D4.7	HFK.2 Engaged participants who OTUW.2 Generative thinkers—crea OTUW.3 Creative thinkers—refram GCTP.1 Self-aware team member GCTP.3 Inquisitive world citizens	CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge WA.1 Survey the Learn, Work, and Life Landscapes	Civic Literacy, Content Knowledge
Skill	SS.3.4	Take Action	How well can I plan and take action to address local, national, and global problems by engaging multiple stakeholders and reflecting on key learnings through the experience?	D2.CIV.6, D4.8	HFK.2 Engaged participants who OTUW.2 Generative thinkers—crea OTUW.3 Creative thinkers—refram GCTP.1 Self-aware team member GCTP.2 Essential co-creators—be GCTP.3 Inquisitive world citizens	CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge CKH.2 Creativity and Entrepreneurship	Civic Literacy, Confidence, Content Knowledge, Contributors
Competency	SS.4	Apply Geographic Knowledge and Reasoning	I can use geographic representations to analyze relationships between place, culture, politics, and economics and evaluate human-environmental interactions and their impacts.				
Skill	SS.4.1	Display and explain spatial patterns	How well can I create maps to display and explain the spatial patterns of cultural and environmental characteristics?	D2.GEO.1	MFL.1 Building the academic core HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages CKH.4 Information, Media, and Technology Skills	Content Knowledge



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Competency Framework

ELA HOS HW MATH NGE PD PE SCI SS VA WF WL

Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Skill	SS.4.2	Apply geographic tools	How well can I analyze maps, satellite images, photographs, and other representations to explain relationships between the locations of places and regions and their political, cultural, and economic dynamics?	D2.GEO.2, D2.GEO.3, D2	MFL.1 Building the academic core HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge	Content Knowledge
Skill	SS.4.3	Analyze relationships between human and environmental systems	How well can I analyze relationships and interactions within and between human and physical systems to explain reciprocal influences that occur among them?	D2.GEO.4, D2.GEO.7, D2.GEO.8, GEO.10	OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge	Civic Literacy, Content Knowledge
Skill	SS.4.4	Evaluate the impacts of human activity on environmental systems	How well can I evaluate the impact of human activities on the environmental characteristics of specific places and regions?	D2.GEO.5, D2.GEO.6, D2.GEO.9, D2.GEO.11, D2.GEO.12	OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages CK.4 Interdisciplinary and Global Knowledge	Civic Literacy, Content Knowledge
Area	VA	Visual Arts					
Competency	VA.1	Create Visual Art	I can conceive and develop new artistic ideas and work.				
Skill	VA.1.1	Generate ideas for a visual art project	How well can I generate ideas for my art project?	NCAAS.1	MFL.1 Building the academic core OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages HOS.4 Learning Strategies CKH.2 Creativity and Entrepreneurship	Content Knowledge, Contributors
Skill	VA.1.2	Organize and develop a project plan	How well do I develop my project plan?	NCAAS.2, NCAAS.10	OTUW.2 Generative thinkers—cre OTUW.3 Creative thinkers—refram	CK.3 Science, Social Studies, Arts, Languages HOS.2 Self-Direction and Perseverance CKH.2 Creativity and Entrepreneurship	Content Knowledge, Contributors
Skill	VA.1.3	Demonstrate understanding of the responsibilities that come with the freedom to create	How responsible am I when creating my project?	NCAAS.2		CK.3 Science, Social Studies, Arts, Languages HOS.1 Academic Behaviors HOS.5 Social Skills and Responsibility CKH.4 Information, Media, and Technology Skills	Content Knowledge, Contributors
Skill	VA.1.4	Refine and improve the work	How well do I revise and improve my project?	NCAAS.3		CK.3 Science, Social Studies, Arts, Languages HOS.3 Positive Mindsets CKH.3 Communication and Collaboration	Content Knowledge, Contributors
Competency	VA.2	Present Visual Art	I can interpret and share visual artwork.				
Skill	VA.2.1	Analyze, interpret, and select artistic work for presentation	How well do I analyze and select artistic work for presentation?	NCAAS.4	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration HOS.2 Self-Direction and Perseverance	Content Knowledge
Skill	VA.2.2	Use artistic techniques to present artwork effectively	How effectively do I present artistic work?	NCAAS.5	MFL.1 Building the academic core	CK.1 English Core CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration	Content Knowledge
Skill	VA.2.3	Convey meaning through the presentation of artistic work	How well do I convey a larger meaning through my presentation of artistic work?	NCAAS.6	MFL.1 Building the academic core	CK.1 English Core CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration CKH.4 Information, Media, and Technology Skills	Content Knowledge
Competency	VA.3	Evaluate Visual Art	I can evaluate how the arts convey meaning.				



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Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Skill	VA.3.1	Interpret meaning and intent in artistic work	How well do I analyze different interpretations of artistic work?	NCAAS.7, NCAAS.8	MFL.1 Building the academic core HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration CK.4 Interdisciplinary and Global Knowledge	Content Knowledge
Skill	VA.3.2	Use criteria to critique artwork	How well do I use criteria to critique artwork?	NCAAS.9	MFL.1 Building the academic core HFK.1 Curious people who are kn	CK.1 English Core CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration	Content Knowledge
Skill	VA.3.3	Relate artistic ideas and works with societal, cultural and historical contexts	How well can I relate artistic ideas to societal and cultural beliefs and values?	NCAAS.11	HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages CKH.3 Communication and Collaboration CK.4 Interdisciplinary and Global Knowledge	Content Knowledge
Area	WF	Wayfinding					
Competency	WF.1	Discover, Plan, and Present My Learning Journey	I can discover my interests and passions to create my postsecondary plan. I can curate a portfolio of my best work, lead my conferences to share my progress and growth, and present my learning.				
Skill	WF.1.1	Discover my interests and plan my future	I can discover my interests and passions, conduct research related to postsecondary pathways I am interested in, and create my postsecondary plan.		LFL.1 Self-driven, self-directed. C LFL.2 Inventors of their own learn	WA.1 Survey the Learn, Work, and Life Landscapes WA.2 Identify Opportunities and Set Goals	
Skill	WF.1.2	Lead my conferences	I can lead a conference to explain my progress and growth in my competencies, share evidence of my work, and determine if I am on track to graduate by my target date.		MFL.1 Building the academic core	CKH.4 Information, Media, and Technology Skills CK.5 Career-Related Technical Skills HOS.1 Academic Behaviors	Communication
Skill	WF.1.3	Curate my portfolio	I can curate a portfolio of my best work and show evidence of my progress toward achieving the characteristics of our Portrait of a Graduate (Profile of a Learner) and the target performance levels and/or growth levels for my competencies.			HOS.3 Positive Mindsets CKH.3 Communication and Collaboration	Communication
Skill	WF.1.4	Present my learning	I can create a formal presentation aligned to the skills on the Present to an Audience competency to share evidence of my growth and progress aligned to our Portrait of a Graduate (Profile of a Learner) and our competencies. I can reflect on my readiness to graduate and how my learning journey has prepared me to achieve my postsecondary plan.			CKH.3 Communication and Collaboration	Communication
Competency	WF.2	Use My Writing Toolkit	I will engage with my PLP and learn how to look at my data dashboards.				
Skill	WF.2.1	Write an engaging cover letter	I can write an engaging cover letter that expresses my interest in a specific opportunity, communicates why I am right for the opportunity, and a specific way to follow up.		LFL.1 Self-driven, self-directed. C LFL.2 Inventors of their own learn	WA.1 Survey the Learn, Work, and Life Landscapes WA.2 Identify Opportunities and Set Goals	
Skill	WF.2.2	Write a well organized resume	I can create a professional resume and/or LinkedIn Profile that highlights my experiences, skills, and achievements.		LFL.2 Inventors of their own learn	WA.1 Survey the Learn, Work, and Life Landscapes WA.3 Design and Iterate Prototype Experiences	Communication
Skill	WF.2.3	Identify and secure references	I can secure and keep updated a diverse list of people who will give me a strong reference when needed.				
Skill	WF.2.4	Compose an email	I can compose well written emails that include all 6 parts, outline the purpose for the email, and ensure the formality matches the relationship I have with the recipient(s).				
Skill	WF.2.5	Create a slide deck	I can create well designed and engaging slide decks to enhance my presentations or projects.				
Competency	WF.3	Engage in Elective Exposure Experiences	I can engage in a variety of elective or leaving to learn experiences to gain exposure to different career options and to discover and pursue my interests and passions.				



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Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Experience	WF.3.1	Complete elective or leaving to learn exposure experiences	I can meet the the requirements for my all of my elective or leaving to learn exposure experiences.		LFL.2 Inventors of their own learn	CK.5 Career-Related Technical Skills	Communication
Competency	WF.4	Build My Essential Technology Skills	I can utilize technology and systems to create artifacts that demonstrate my learning and to track, monitor, and understand my growth and progress.				
Skill	WF.4.1	Take care of my laptop	I am responsible with my laptop and charger and take precautions to protect it from damage.		LFL.2 Inventors of their own learn	WA.1 Survey the Learn, Work, and Life Landscapes WA.3 Design and Iterate Prototype Experiences	
Skill	WF.4.2	Be prepared	I bring my laptop and charger every day so I can be prepared for my learning.		LFL.2 Inventors of their own learn	WA.1 Survey the Learn, Work, and Life Landscapes WA.2 Identify Opportunities and Set Goals WA.3 Design and Iterate Prototype Experiences WA.4 Find Needed Help and Resources WA.5 Navigate Each Stage of the Journey	Content Knowledge, Contributors
Skill	WF.4.3	Access my Google account	I can access and use all my Google Apps like Drive, Classroom, and others.			CKH.5 Practical Life Skills	
Skill	WF.4.4	Access my Slate account	I can access my Slate using my login information and I know who to contact if I forget my password.			CKH.2 Creativity and Entrepreneurship	Content Knowledge, Contributors
Skill	WF.4.5	Login to my computer	I can login to my computer and I know who to contact if I forget my password.				
Skill	WF.4.6	Manage my Google Drive	I can create, edit, share, and make copies of Google files to document and share my learning.				
Skill	WF.4.7	Access my task dashboard	I can access my task dashboard in Slate and use the filtering feature to manage my tasks.				
Skill	WF.4.8	Access my competency dashboard	I can access my competency dashboard to view my competency progress, performance, and growth in each content area.				
Skill	WF.4.9	Access my PLP	I can access my PLP and use it to set goals and communicate my progress to my advisor and family.				
Skill	WF.4.10	Create videos	I can edit video and create screencasts to demonstrate and share my learning.				
Competency	WF.5	Complete My Wayfinding Graduation Requirements (Choose/Add Requirements)	I can complete my additional Wayfinding Graduation Requirements to ensure I am ready and prepared to graduate from high school.				
Experience	WF.5.1	Complete the CBE Experience	I can complete all of the missions in the CBE Experience to build my understanding of CBE, Slate, and my PLP.				
Experience	WF.5.2	Participate in a mock interview	I can conduct myself professionally in a mock job interview.				
Experience	WF.5.3	Visit a postsecondary program	I visit colleges or other post-secondary programs to inform my future plans.				
Experience	WF.5.4	Complete my postsecondary plan	I can create and implement my plans for after I graduate high school.				
Experience	WF.5.5	Participate in work or internship experience	I can obtain and maintain a work or internship experience for a minimum of 8 weeks.				
Experience	WF.5.6	Implement my design capstone	I can identify a problem, issue, or challenge I am passionate about and then create and implement my solution in the world.				
Experience	WF.5.7	Complete my humanities experience	I can choose and complete a humanities experience that interests me.				
Experience	WF.5.8	Take the SAT or ACT	I can take the SAT or ACT exam.				
Experience	WF.5.9	Pass the ELA State Assessment (e.g., Keystone, MCAS)	I can successfully pass my ELA state required exam.				
Experience	WF.5.10	Pass the Math State Assessment (e.g., Keystone, MCAS)	I can successfully pass my Math state required exam.				
Experience	WF.5.11	Pass the Science State Assessment (e.g., Keystone, MCAS)	I can successfully pass my Science state required exam.				


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Type	Code	Descriptor	Statement or Guiding Question	National Standards Alignment	XQ Learning Goals Cross	MyWays Connections	Portrait of a Graduate Alignment
Area	WL	World Language					
Competency	WL.1	Communicate in Languages Other Than English	I can communicate effectively in more than one language in order to function in a variety of situations and for multiple purposes.				
Skill	WL.1.1	Engage in Conversations	How well can I participate in conversations to negotiate and share information?	NCSSFL-ACTFL.Interpersonal Communication	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages	Communication, Content Knowledge
Skill	WL.1.2	Present to an Audience of Listeners and Viewers	How do I present information to an audience of listeners and viewers?	NCSSFL-ACTFL.Presentational Communication.Spoken	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages	Communication, Content Knowledge
Skill	WL.1.3	Present to an Audience of Readers and Viewers	How do I present information to an audience of readers and viewers?	NCSSFL-ACTFL.Presentational Communication.Written	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages	Communication, Content Knowledge
Skill	WL.1.4	Interpret Spoken Language	How well can I understand and interpret what I hear?	NCSSFL-ACTFL.Interpretive Communication.Spoken	MFL.1 Building the academic core	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Skill	WL.1.5	Interpret Written Language	How well can I understand and interpret what I read?	NCSSFL-ACTFL.Interpretive Communication.Written	MFL.1 Building the academic core MFL.2 Critical readers.	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Competency	WL.2	Interact with Cultural Competence and Understanding	I can interact with cultural competence and understanding.				
Skill	WL.2.1	Relate Cultural Practices to Perspectives	How do I analyze practices and perspectives?	NCSSFL-ACTFL.Intercultural Communication.Practices	HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Skill	WL.2.2	Relate Cultural Products to Perspectives	How do I analyze products and perspectives?	NCSSFL-ACTFL.Intercultural Communication.Products	HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Competency	WL.3	Develop Insight into the Nature of Language and Culture	I can develop insight into the nature language and culture in order to interact with cultural competence.				
Skill	WL.3.1	Compare the Language Studied and Your Own	How do I compare the language studied to my own?	NCSSFL-ACTFL.Intercultural Communication	HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge
Skill	WL.3.2	Compare the Culture Studied and Your Own	How do I compare the culture studied to my own?	NCSSFL-ACTFL.Intercultural Communication.Practices and Products	HFK.1 Curious people who are kn	CK.3 Science, Social Studies, Arts, Languages	Content Knowledge



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Code	Skill Descriptor	Statement or Guiding Question	Danielson Crosswalk
TC.1	Building Relationships	I can build trusting relationships with students, families, and colleagues and consistently implement trauma-informed and restorative practices and culturally responsive teaching.	
TC.1.1	Implement trauma-informed and restorative practices	I can interact with students in a fair and equitable manner and consistently implement trauma-informed and restorative practices to support my students.	Danielson 2a, 2d, 4f
TC.1.2	Create opportunities for relationship building	I can create opportunities for students to build relationships with me and with each other and to consider multiple perspectives and manage conflict.	Danielson 2a
TC.1.3	Value and practice culturally responsive teaching	I value students' cultural and linguistic backgrounds and experiences and view this knowledge as capital upon which I can build.	Danielson 1b, 2a, 4f
TC.1.4	Engage families and the community	I engage families and community members to support students' learning and to grow students' personal and professional networks.	Danielson 4c
TC.1.5	Collaborate with and support colleagues	I can collaborate with, support, and seek help from my colleagues while adhering to norms and managing conflict as it arises.	Danielson 4d, 4f
TC.2	Personal and Professional Growth and Development	I can self-assess, set goals, collect data, and implement a continuous improvement process to work on my personal and professional growth and development.	
TC.2.1	Seek and embrace challenges and take risks	I can overcome personal barriers to be able to seek academic challenges and take risks to pursue learning and improved outcomes for students.	
TC.2.2	Persevere through setbacks	I can persevere through significant academic and non-academic setbacks or failures and I use mistakes and failures as opportunities for learning and growth.	
TC.2.3	Adopt an innovative mindset	I strongly believe in the mission and vision of my school and I understand that adopting an innovative mindset requires patience, time, perseverance through failure, and consistently challenging my traditional beliefs about the purpose of school.	Danielson 4f
TC.2.4	Seek feedback, support, and resources	I consistently seek out feedback and am comfortable asking for help when I need it.	Danielson 1d, 4f
TC.2.5	Set goals and reflect on personal and professional growth	I set measurable goals for my personal and professional development and use a continuous improvement process to gather data, reflect on my progress, and apply my learning.	Danielson 4a



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Code	Skill Descriptor	Statement or Guiding Question	Danielson Crosswalk
TC.2.6	Practice self-care and build emotional intelligence	I practice self-care and continue to work on my emotional capacity to care for students who are high need.	
TC.2.7	Commitment to professional learning and leadership	I seek opportunities to deepen my professional practice and to take on a leadership role.	Danielson 1d, 4d, 4e, 4f
TC.2.8	Effective use of technology	I am comfortable using and supporting others in using a variety of technology and I seek new types of technology to learn and introduce to my students.	
TC.3	Mentoring Through Advisory	I can create a safe space for me and my students to build trusting and meaningful relationships with each other, where every student is known and feels cared for, and where I challenge and support students in their academic, personal, and social-emotional growth and development.	
TC.3.1	Nurture trusting and meaningful relationships with students	I can nurture trusting and meaningful relationships with and among the students in my advisory.	Danielson 2a, 4f
TC.3.2	Nurture trusting relationships with families	I can nurture trusting relationships with the families of each student in my advisory and proactively engage families in a team effort to support their child's social, emotional, and academic growth and progress.	Danielson 4c
TC.3.3	Build community and ownership	I can design, adapt, and/or facilitate activities that allow students to build community, engage in meaningful conversations, and take ownership of their school experience.	Danielson 2a
TC.3.4	Monitor data and appropriately intervene	I can regularly and consistently monitor the academic, attendance, and behavior data for the students in my advisory and provide interventions when necessary	Danielson 3d, 4b, 4d, 4f
TC.3.5	Hold regular one-to-one conferences	I can facilitate one-to-one conferences with students to support their academic and personal progress and growth.	Danielson 4b
TC.3.6	Provide opportunities for growth in Personal Development and Habits of Success competencies	I provide students with ample opportunities to monitor and reflect on their Personal Development goals and to evidence the Habits of Success competencies at the highest levels.	
TC.3.7	Support post-secondary planning	I can support students in developing an actionable and realistic post-secondary plan and provide support, feedback, and resources to help students successfully implement their plans.	



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Code	Skill Descriptor	Statement or Guiding Question	Danielson Crosswalk
TC.4	Designing for Engagement and Impact	I can design meaningful and relevant learning opportunities that address authentic, real-world problems or complex questions and allow students to apply their learning to impact an authentic audience.	
TC.4.1	Authentic problem frame or question	I can design studios that challenge students to wrestle with a complex and authentic problem or question.	Danielson 2b, 3c, 3e
TC.4.2	Culminating performance tasks aligned to competencies	I can design culminating performance tasks in alignment with target competencies that address the problem frame of my studio.	Danielson 1f
TC.4.3	Engaging launch	I can design an engaging launch for my studio that clearly communicates the "why" and gives a compelling reason for students to engage in the content and learning while also creating a shared experience and building a shared understanding.	Danielson 2b, 3c
TC.4.4	Investigate the problem	I can use the backwards design process to deconstruct my culminating task and to design learning experiences that allow my students to investigate the problem from a variety of perspectives in an authentic way.	Danielson 1b, 1c, 1e, 1f, 2b, 3c
TC.4.5	Impact on authentic audience	I can support my students in applying their learning to make a real impact on an authentic audience.	
TC.4.6	Designing for daily facilitation	I can use multiple forms of data to inform my daily facilitation plan and to design activities and mini-lessons that meet the individual needs of my students.	Danielson 1b, 1c, 1e, 1f, 3a, 3c, 3d
TC.5	Facilitating Personalized Learning	I can create a personalized learning environment where students are accountable for their own learning and I regularly use data, systems, and technology to differentiate, adapt, and provide access as I support each student in developing their personalized pathway.	
TC.5.1	Safe, structured, and flexible learning environment	I can establish a safe, structured, and flexible learning environment for a diverse population of students.	Danielson 2a, 2c, 2d, 2e
TC.5.2	Performance-based and formative assessment aligned to the competencies and continua	I can communicate clear and measurable learning targets and outcomes and design performance-based and formative assessments aligned to the competencies and continua.	Danielson 1f, 3a, 3d



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Code	Skill Descriptor	Statement or Guiding Question	Danielson Crosswalk
TC.5.3	Higher level thinking and high quality content	I can engage students in higher level thinking, questioning, and synthesis through high quality, meaningful, and relevant content presented from multiple perspectives.	Danielson 1a, 1e, 2b, 3a, 3b, 3c, 3
TC.5.4	Scaffolding and differentiation	I can set rigorous expectations for students while providing scaffolds and supports so that students across all differences can access the learning.	Danielson 1b, 1c, 1e, 3e, 4d
TC.5.5	Personalization	I can personalize learning for students by tailoring tasks to students' levels, needs, and interests, by providing cognitive choice, and by encouraging students to take ownership of their learning.	Danielson 1c, 1e, 3c, 3e
TC.5.6	High quality work through feedback and revision	I can set expectations for high quality work products through the use of self-assessment, goal-setting, feedback, and revision cycles.	Danielson 2b, 3d
TC.5.7	Use systems to organize, manage, and analyze data to inform instruction	I can manage, incorporate, collect, and analyze a variety of data to improve my practice and to improve engagement and outcomes for all students.	Danielson 1b, 3d, 3e, 4a, 4b
TC.5.8	Enhance learning with digital tools	I can use technology to enhance teaching and learning, build digital fluency, and create new products.	

TC.1 Building Relationships

I can build trusting relationships with students, families, and colleagues and consistently implement trauma-informed and restorative practices and culturally responsive teaching.

	Novice	Developing	Proficient	Expert/Mentor
<p>TC.1.1</p> <p>Implement trauma-informed and restorative practices</p>	<p>I establish my expectations for my learning environment.</p> <p>I am not always aware of the impact of trauma on my students' behavior and I sometimes unintentionally trigger students and escalate behaviors.</p> <p>I am sometimes triggered by the words and behaviors of certain students and may respond to them in a negative way that causes harm.</p> <p>I do not use restorative practices responsibly (repairing harm and restoring relationships) to manage student behavior. I am sometimes frustrated by the lack of more traditional consequences.</p>	<p>I establish equitable expectations for my learning environment and hold students accountable to those expectations.</p> <p>I am aware of how trauma can impact my students and I try not to trigger or escalate behaviors. I sometimes need strategies to support me when students are triggered.</p> <p>I recognize when I am triggered by a student's words or behavior and am learning how to depersonalize those feelings so that I can respond to students in a positive way that respects their dignity.</p> <p>I sometimes use restorative practices responsibly (repairing harm and restoring relationships) to manage student behavior and am starting to implement proactive strategies.</p>	<p>I collaborate with my students to create equitable expectations for our learning environment and we hold each other accountable for those expectations.</p> <p>I understand that students have varying traumatic experiences and I am aware of how students' trauma may influence their behaviors. In the moment, I make efforts to prevent situations that might cause harm or trigger students. I am consistently effective in my use of de-escalation strategies when students are triggered.</p> <p>I almost always interact with students in a fair and equitable manner. When addressing student behavior, I use language that respects students' dignity and is sensitive to individual student needs.</p> <p>I use restorative practices, both proactively (building relationships and developing community) and responsively (repairing harm and restoring relationships).</p>	<p>My students independently collaborate to create equitable expectations for our learning environment and hold each other accountable for those expectations.</p> <p>I understand that students have varying traumatic experiences and I am aware of how students' trauma may influence their behaviors. I proactively make efforts to prevent situations that might cause harm or trigger students. I am consistently effective in my use of de-escalation strategies when students are triggered.</p> <p>I always interact with students in a fair and equitable manner. When addressing student behavior, I use language that respects students' dignity and is sensitive to individual student needs.</p> <p>I consistently and effectively use restorative practices, both proactive (building relationships and developing community) and responsive (repairing harm and restoring relationships).</p>
<p>TC.1.2</p> <p>Create opportunities for relationship-building</p>	<p>I do not often prioritize relationship-building as a tool for student engagement and learning.</p> <p>My relationships with students are heavily based either on accountability or on care/support and I struggle to find the balance between the two.</p> <p>I do not always know how to support students in considering multiple perspectives to build relationships across dimensions of difference.</p> <p>I struggle to help students identify and manage conflict and/or don't think I should get involved in student conflicts</p>	<p>I am able to build relationships with some students, but struggle to create opportunities for relationship-building with all of my students.</p> <p>I understand that students need both accountability and care/support but I struggle to find the balance between the two.</p> <p>I sometimes provide my students with opportunities to consider multiple perspectives in order to build relationships across dimensions of difference.</p> <p>I support students in using some strategies to engage in, manage, and resolve conflicts (e.g. active listening, seek to understand, check assumptions etc.), but am not always successful.</p>	<p>I create opportunities for my students to build relationships with me.</p> <p>My interactions with students reflect a genuine ethic of care balanced with accountability which creates an environment where all students feel known, valued, and safe.</p> <p>I teach my students to consider multiple perspectives and I provide students with the opportunity and support to reflect on their own assumptions and beliefs in order to build stronger relationships across dimensions of difference.</p> <p>I support students in using a variety of strategies to engage in, manage, and resolve conflicts (e.g. active listening, seek to understand, check assumptions etc.).</p>	<p>I consistently create opportunities for my students to build relationships with me and with each other.</p> <p>My interactions with students reflect a genuine ethic of care balanced with accountability that is sensitive to the individual needs of each student, which creates an environment where all students feel known, valued, and safe.</p> <p>I teach my students to consider multiple perspectives and I provide students with the opportunity and support to reflect on their own assumptions and beliefs and to be successful working across dimensions of difference (i.e. varied student groupings, collaborative tasks, problem solving challenges, discussions).</p> <p>My students independently use a variety of strategies to engage in, manage, and resolve conflicts (e.g. active listening, seek to understand, check assumptions etc.).</p>
<p>TC.1.3</p> <p>Value and practice culturally responsive teaching</p>	<p>I feel uncertain about how to think about my own assumptions, values, biases, privilege, and beliefs and I sometimes feel defensive and attacked when I engage in dialogue about racial identity development and culturally responsive instructional practices.</p> <p>I understand my students come from diverse backgrounds but I don't always know how to leverage and accommodate that diversity.</p> <p>I don't always know how to select content and instructional materials that reflect the racial, ethnic, and/or cultural diversity of my students.</p> <p>I don't always recognize how my words and actions impact different students.</p> <p>I need to pay more attention to how I display students' work that celebrates the cultural diversity of my students.</p>	<p>Others help me to reflect on my own assumptions, values, biases, privilege, and beliefs. I am learning to manage my feelings to fully engage in racial identity development and culturally responsive instructional practices.</p> <p>I understand my students come from diverse backgrounds and I attempt to scaffold and accommodate learning differences, but I am still learning about how to build on student diversity in an asset-based way</p> <p>I sometimes select content and instructional materials that reflect the racial, ethnic, and/or cultural diversity of my students.</p> <p>I understand that my words and actions may have different impacts on different students and am sometimes aware of this impact.</p> <p>I sometimes display students' work that celebrates the cultural diversity of my students.</p>	<p>I reflect on my own assumptions, values, biases, privilege, and beliefs and understand how my experiences have shaped my views. I sometimes seek out opportunities for feedback and growth in my own racial identity development and culturally responsive instructional practices.</p> <p>I understand that learning about the cultures and languages of individual students allows me to connect to my students' experiences.</p> <p>I select content and instructional materials that reflect the racial, ethnic, and cultural diversity of my students.</p> <p>I establish and maintain an environment that is sensitive and respectful for the entire, diverse population of students.</p> <p>I often select and display student work that celebrates and reflects the diversity of my students and is respectful to individual and community context.</p>	<p>I critically analyze my own assumptions, values, biases, privilege, and beliefs and understand how my experiences have shaped my views. I always seek out opportunities for feedback and growth in my racial identity development and culturally responsive teaching.</p> <p>I understand that learning about the cultures and languages of individual students allows me to build upon, connect to, and value their existing knowledge and experiences.</p> <p>I select content and instructional and materials that reflect the racial, ethnic, and cultural diversity of my students. I encourage students to make cultural contributions to the curriculum.</p> <p>My students and I hold each other accountable for establishing and maintaining an environment that is sensitive and respectful for the entire, diverse population of students.</p> <p>My students and I work together to regularly select and display student work that celebrates and reflects the diversity and individualism of students in my learning environment and is respectful to individual and community context.</p>
<p>TC.1.4</p> <p>Engage families and the</p>	<p>I most often use the same method of communication to engage families.</p> <p>I try to build relationships with few of my students' families.</p>	<p>I engage with families using a variety of communication strategies.</p> <p>I work to build relationships with some of my students' families to support student learning.</p>	<p>I effectively engage families using a variety of culturally responsive practices and communication strategies.</p> <p>I work to build relationships with most of my students' families, and am starting to build relationships with some community members, businesses, and others outside of the school to support student learning.</p>	<p>I effectively engage families using a variety of culturally responsive practices and communication strategies that result in increased and/or more meaningful student and family participation and engagement.</p> <p>I have strong relationships with most of my students' families as well as community members, businesses, and others outside of the school to support communities of practice that enhance student learning.</p>

TC.1 Building Relationships

I can build trusting relationships with students, families, and colleagues and consistently implement trauma-informed and restorative practices and culturally responsive teaching.

	Novice	Developing	Proficient	Expert/Mentor
community	I mention to students the need to build personal and professional networks but do not know how to support them in building these networks.	I talk to my students about the need to build personal and professional networks and explain a few ways they should be doing that.	I am explicit with my students about the value of building personal and professional networks and I make suggestions for people my students can connect with to build these networks.	I am explicit with my students about the value of building personal and professional networks and I am actively connecting community members and business partners with my students to provide opportunities to build these networks.
TC.1.5	I am not always aware when I have broken a school norm. I am uncomfortable pointing out when one of my colleagues has broken a norm.	I adhere to our school norms and realize when I have broken a norm but am reluctant to address when someone else has broken a norm.	I adhere to our school norms and sometimes address when a norm is broken by myself or one of my colleagues.	I always adhere to our school norms and am comfortable addressing when a norm is broken by myself or one of my colleagues.
Collaborate with and support colleagues	I would rather work alone and do not feel comfortable giving feedback to my colleagues. I rarely seek support and am uncomfortable asking for help to improve my own ideas and instructional practices.	I support my colleagues in implementing their ideas. I seek out the support of a few trusted colleagues when I need help to improve my own ideas and instructional practices.	I support my colleagues in implementing their ideas and in providing them feedback when asked. I seek out support and feedback from the colleagues I work closely with in order to improve my own ideas and instructional practices.	I support my colleagues in implementing their ideas and in providing them with solicited and unsolicited feedback. I seek out the support and feedback of many different colleagues as well as other members of my professional network in order to improve my own ideas and instructional practices.
	I am uncomfortable engaging in any conflict or sometimes unproductively engage in conflict.	I am learning to engage in constructive conflict and need more strategies to engage effectively (e.g. active listening, seek to understand, check assumptions, etc).	I effectively use a variety of strategies to engage in, manage, and resolve conflicts (e.g. active listening, seek to understand, check assumptions etc.).	I effectively use a variety of strategies to engage in, manage, and resolve conflicts (e.g. active listening, seek to understand, check assumptions etc.) and regularly support my colleagues in resolving conflicts.

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[Massachusetts Model System for Educator Evaluation](#)

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[Educator Competencies for Personalized, Learner-Centered Teaching](#)

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TC.2 Personal and Professional Growth and Development

I can self-assess, set goals, collect data, and implement a continuous improvement process to work on my personal and professional growth and development.

	Novice	Developing	Proficient	Expert/Mentor
TC.2.1 Seek and embrace challenges and take risks	I rarely take on new challenges or risks to pursue learning.	With encouragement, I sometimes take on new challenges and risks to pursue learning.	I seek new challenges and I take risks to pursue learning.	I strategically seek new challenges and take risks (i.e. to address an enduring problem, to implement new technology, to apply feedback from students to improve engagement) to improve outcomes for students.
	I worry too much about what could go wrong or how I might fail and I am unable to get past the worry to take a risk. I struggle to identify my personal barriers (mindset, beliefs, circumstances) that inhibit my ability to take risks. I often give up at the slightest setback or failure.	I worry about what could go wrong or how I might fail, but with encouragement, I can sometimes get past the worry to take a risk. I can identify my personal barriers (mindset, beliefs, circumstances) that inhibit my ability to take risks. I can sometimes recover from setbacks or failure.	When I begin to worry, I try to reframe my thinking to a wondering instead of a worry about what might happen if I take a risk. I can identify and reflect on my personal barriers (mindset, beliefs, circumstances) that inhibit my ability to take risks. I can most often persevere through setbacks or failure.	I catch myself when I begin to worry and I can immediately shift my thinking to wondering and curiosity about what might happen if I take a risk. I analyze and overcome personal barriers (mindset, beliefs, circumstances) that could inhibit taking risks. I consistently persevere through significant academic and non-academic setbacks or failures.
TC.2.2 Persevere through setbacks	I view failure as a reflection of my inherent ability and I do not think effort or practice will help me get better at a skill, improve the quality of my work, or improve my performance.	I believe effort and practice can help me get better at some things, but no matter how much effort I put in, there are some parts of my work or performance that I believe I will never be good at. I can identify challenges, failures, mistakes, or setbacks and describe my reactions to them (i.e. giving up or trying harder).	I understand the importance of effort and practice as it relates to getting better at skills, improved work quality, or performance and I believe I can continually improve myself both personally and professionally. I can identify challenges, failures, mistakes, or setbacks and reflect on my reactions to them (i.e. giving up, trying harder). I use mistakes, failures, and struggles as opportunities for growth.	I demonstrate how improved performance and work quality are gained through effort, persistence, patience, and time. I can identify challenges, failures, mistakes, or setbacks, reflect on my reactions to them (i.e. giving up, trying harder), and apply that learning through repeated new efforts. I use mistakes, failures, and struggles as opportunities for growth and I transparently share my reflections with others.
	I express a belief in the mission and vision of my school but my practices may present otherwise. I am often unaware of my traditional beliefs and mindsets about education until others bring it to my attention. I expect to see the desired outcomes of our innovation happen quickly and when they do not, I fall back on traditional and familiar structures and practices. I am hesitant to implement many of our innovative initiatives and wait for others to have some success before I try.	I believe in the mission and vision of my school but am sometimes unsure of how we will succeed. I am somewhat aware of my traditional beliefs and mindsets about education and the purpose of school but I don't always realize how and when they interfere with my ability to innovate or change. I understand that innovation and change take time, but when I do not see short term results, I start to fall back on traditional and familiar structures and practices. I try to implement some of our innovative initiatives but am not confident in what I am doing.	I believe in the mission and vision of my school. I am motivated to try to be part of the reason we are successful. I am aware of my traditional beliefs and mindsets about education and the purpose of school and I reflect on them to understand how they influence or interfere with my ability to innovate or change. I understand that innovation and change are not easy and take time and perseverance. I push our innovative initiatives forward and am willing to pilot something new.	I strongly believe in the mission and vision of my school. I have a strong sense of purpose and motivation and I believe that I am an essential part of our ability to succeed. I am aware of and consistently challenge my traditional beliefs and mindsets about education and the purpose of school. I understand that an innovative mindset requires commitment and that innovation and change are not easy and take time and perseverance. I consistently push our innovative initiatives forward and am always willing to pilot something new and to support my colleagues who are struggling.
TC.2.3 Adopt an innovative mindset	I am not confident talking to students and families about our innovative initiatives and struggle to explain why we are implementing these changes. When problems arise as we implement our innovation, I usually attribute the problem to some or all of the elements of our innovation (i.e. CBE, Slate, studio design) instead of trying to work with others to determine and implement solutions.	I attempt to talk to students and families about the "why" of our innovative initiatives but struggle to clearly explain all of the different components of our innovation. When problems arise as we implement our innovation, I start to have doubts about some of the elements of our innovation (i.e. CBE, Slate, studio design).	I can clearly communicate the "why" and the "how" of our innovative initiatives to students and families. When problems arise as we implement our innovation, I seek to understand why without blaming the innovation itself.	I can clearly communicate the "why" and the "how" of our innovative initiatives and am comfortable talking to all stakeholders in a variety of settings (e.g. back to school nights, board meetings, district/state meetings, when other schools visit). When problems arise as we implement our innovation, I seek to understand why, and actively work with others to determine and implement solutions.
	When problems arise as we implement our innovation, I usually attribute the problem to some or all of the elements of our innovation (i.e. CBE, Slate, studio design) instead of trying to work with others to determine and implement solutions.	I am leading the way in one or more areas of implementation (i.e. designing studios in Google sites, collaborating with teachers to co-design interdisciplinary projects, connecting my studios to careers and industry partners).	I consistently push our innovative initiatives forward and am always willing to pilot something new and to support my colleagues who are struggling.	I can clearly communicate the "why" and the "how" of our innovative initiatives and am comfortable talking to all stakeholders in a variety of settings (e.g. back to school nights, board meetings, district/state meetings, when other schools visit). When problems arise as we implement our innovation, I seek to understand why, and actively work with others to determine and implement solutions.
TC.2.4 Seek feedback, support, and resources	I struggle to be open when receiving criticism and feedback. I do not ask for help because I am afraid of appearing inept or incompetent. I have a limited knowledge of resources both within my school, district, and online. I rarely seek out or use these resources to build my professional knowledge.	I can be open to feedback and criticism, but only from certain trusted individuals. I will ask for help, but only from certain trusted individuals. I have some knowledge of resources both within my school, district, and online. I occasionally use these resources to build my professional knowledge.	I sometimes seek out and use feedback and criticism (when appropriate) from a variety of individuals (i.e. administrators, colleagues, students) to improve my practice and help me grow both professionally and personally. I am sometimes comfortable asking for help because I know we are all learners and have room for improvement. I have considerable knowledge of resources both within my school, district, and online, as well as in the community. I consistently use these resources to build my professional knowledge.	I always seek out and use feedback and criticism (when appropriate) from a wide variety of individuals (i.e. administrators, colleagues, students) to improve my practice, shift my thinking, and help me grow both professionally and personally. I am comfortable asking for help and I view my own lack of knowledge or competence as an invitation to learn and to grow. I have an extensive knowledge of resources both within my school, district, and online, as well as in the community. I strategically use these resources to build my professional knowledge and extend and enhance learning opportunities for my students.
	When prompted by others, I reflect on the effectiveness of lessons, tasks, studio design, and interactions with students, but my reflections are not always as objective as I would like them to be.	When prompted by others, I reflect on the effectiveness of lessons, tasks, studio design, and interactions with students.	I sometimes reflect on the effectiveness of lessons, tasks, studio design, and interactions with students.	I regularly reflect on the effectiveness of lessons, tasks, studio design, and my interactions with students.
TC.2.5				

TC.2 Personal and Professional Growth and Development

I can self-assess, set goals, collect data, and implement a continuous improvement process to work on my personal and professional growth and development.

	Novice	Developing	Proficient	Expert/Mentor
<p>TC.2.5</p> <p>Set goals and reflect on personal and professional growth</p>	<p>I do not really provide opportunities for students to give me feedback.</p> <p>When promoted and with support, I set measurable goals (i.e. SMART goals) for my personal and professional development that are based on my self-assessment on the teacher competencies.</p>	<p>I occasionally ask my students for feedback on my teaching practices or my learning environment.</p> <p>With support, I set measurable goals (i.e. SMART goals) for my personal and professional development that are based on my self-assessment on the teacher competencies. I occasionally track my progress towards achieving my goals.</p>	<p>I sometimes ask my students for feedback on my teaching practices, the learning environment, and my relationships.</p> <p>I set measurable goals (i.e. SMART goals) for my personal and professional development that are based on my thorough self-assessment on the teacher competencies. I consistently track my progress towards achieving my goals and I reflect on my progress.</p>	<p>I regularly involve my students in giving me feedback and in helping me reflect on my teaching practices, my relationships, and the learning environment.</p> <p>I set measurable goals (i.e. SMART goals) for my personal and professional development that are based on my thorough self-assessment on the teacher competencies. I consistently track my progress towards achieving my goals and I reflect on and share my progress with others.</p> <p>I use research-based approaches such as design thinking or other continuous improvement processes to reflect on and examine my teaching practice.</p>
<p>TC.2.6</p> <p>Practice self-care and build emotional intelligence</p>	<p>I often blame myself or others when I feel overwhelmed or unsuccessful.</p> <p>I am not familiar with the concept of secondary trauma or the corresponding symptoms.</p> <p>I do not have a set of strategies that I regularly use to improve my sense of well-being.</p> <p>I don't always feel comfortable going to colleagues or friends for help or support.</p>	<p>I am aware that increasing my emotional intelligence (self-awareness, self-regulation, motivation, empathy, and social skills) will improve my sense of well-being, but I don't always know how to do that.</p> <p>I am somewhat familiar with the concept of secondary trauma and compassion fatigue but I am not always aware of when I am experiencing those symptoms.</p> <p>I sometimes utilize healthy strategies (e.g. mindfulness, meditation, exercise) to improve my sense of well-being outside of the workplace.</p> <p>I have a few trusted colleagues and friends that I can reach out to when I need support.</p>	<p>I seek out resources and support in order to increase my emotional intelligence (self-awareness, self-regulation, motivation, empathy, and social skills).</p> <p>I understand that I may experience secondary trauma or compassion fatigue from working with students impacted by trauma and I know the symptoms to watch for.</p> <p>I consistently utilize healthy strategies (e.g. mindfulness, meditation, exercise) to improve my sense of well-being outside of the workplace.</p> <p>I have a positive network of colleagues and friends that I regularly reach out to for support.</p>	<p>I actively seek out resources, support, and feedback in order to increase my emotional intelligence (self-awareness, self-regulation, motivation, empathy, and social skills).</p> <p>I understand that I may experience secondary trauma or compassion fatigue from working with students impacted by trauma and I try to care for myself when those symptoms occur.</p> <p>I consistently utilize healthy strategies (e.g. mindfulness, meditation, exercise) to improve my sense of well-being and take good care of myself both onsite and away from the work environment.</p> <p>I have a positive network of colleagues and friends that I regularly reach out to for support and they hold me accountable to my self-care goals.</p> <p>I share my self-regulation skills and practices with colleagues.</p>
<p>TC.2.7</p> <p>Commitment to professional learning and leadership</p>	<p>I only attend required professional development (PD). I prefer to spend my planning /PD time working independently.</p> <p>I do not like to share resources I create or that I am using because I am worried that people will judge me or think they are not good.</p> <p>I do not invite people in to observe my practice and I don't feel comfortable observing others or giving feedback.</p>	<p>I will occasionally attend a voluntary PD session or workshop but don't often seek out these opportunities. I will collaborate with others but I am sometimes uncomfortable because I don't think I can contribute as much or as well as others.</p> <p>I will share resources that I have designed if I am encouraged to and if I feel confident they are good.</p> <p>I will invite a few trusted individuals in to observe my practice and give me feedback. I am not comfortable giving feedback to others but I do learn from observing others.</p>	<p>I seek opportunities to grow professionally and to collaborate with and learn from others.</p> <p>I am willing to lead professional development in a specific area in which I am comfortable. I am always willing to share things I have designed or that I am doing.</p> <p>I invite others in to observe my practice and I am willing to observe my peers or review their instructional design to offer constructive feedback related to their personal and professional goals.</p> <p>If I am asked, I will serve as a teacher-leader or mentor.</p>	<p>I seek professional opportunities that challenge my thinking, deepen my practice, and allow me to collaborate with and learn from others.</p> <p>I effectively lead peer collaboration and/or professional development (i.e. designing relevant studios, designing rigorous, continua-aligned performance tasks, norming student work, using data to personalize learning for all students). I am always willing to share anything that I have designed or am doing both within and outside of my school.</p> <p>I welcome visitors both from within and outside of my school to observe my practice and I am always willing to observe my peers or review their instructional design to offer constructive feedback related to their personal and professional goals.</p> <p>I seek or create opportunities to serve as a teacher-leader, mentor, or coach.</p> <p>I take a leadership role in promoting a professional learning environment that embraces a culture of inquiry and innovation, problem solving, interdisciplinary studio design, and shared accountability for student learning.</p>
<p>TC.2.8</p> <p>Effective use of technology</p>	<p>I am not comfortable and have a fixed mindset when it comes to technology use and I would prefer to only use technology minimally.</p> <p>At the first sign of trouble, I abandon using technology. If I encounter a problem with the technology I am required to use, I don't try to solve it and I contact someone and wait for them to fix the problem.</p>	<p>I am applying a growth mindset to learning how to use all of the required technology (i.e. Google Drive, Slate, PLP) but sometimes I get confused or frustrated.</p> <p>I have one or two strategies I use when technology fails (i.e. restart, refresh) but often need to reach out for help and support and wait for someone to fix the problem.</p>	<p>I am comfortable using a variety of technology on a daily basis.</p> <p>I try a variety of troubleshooting strategies when technology fails before I reach out for help.</p> <p>I support other teachers in using technology and troubleshooting problems.</p>	<p>I am comfortable using a variety of technology on a daily basis and am constantly seeking new technology to learn myself and to introduce to my students.</p> <p>I have a variety of troubleshooting strategies I use when technology fails. I know when the problem is one I cannot fix and I know who I need to contact and can confidently explain the problem.</p> <p>I support other teachers in using technology and in troubleshooting problems. I am comfortable training others and being one of the technology leaders.</p> <p>I model using technology for other teachers.</p>

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Sources: RUBRICS FROM THE FRAMEWORK FOR TEACHING

TC.2 Personal and Professional Growth and Development

I can self-assess, set goals, collect data, and implement a continuous improvement process to work on my personal and professional growth and development.

Novice

Developing

Proficient

Expert/Mentor

[Educator Competencies for Personalized, Learner-Centered Teaching](#)

[Massachusetts Model System for Educator Evaluation](#)

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TC.3 Mentoring Through Advisory

I can create a safe space for me and my students to build trusting and meaningful relationships with each other, where every student is known and feels cared for, and where I challenge and support students in their academic, personal, and social-emotional growth and development.

	Novice	Developing	Proficient	Expert/Mentor
<p>TC.3.1</p> <p>Nurture trusting and meaningful relationships with students</p>	<p>I am working on developing trusting relationships with the students in my advisory.</p> <p>I develop individual relationships with some of the students in my advisory to get to know their interests, passions, and goals.</p> <p>I advocate for students in my advisory when they need my support.</p> <p>I am learning how to support the social and emotional growth of my students.</p>	<p>I develop and nurture trusting relationships with the students in my advisory.</p> <p>I develop individual relationships with most of the students in my advisory to get to know their strengths, challenges, interests, passions, and goals.</p> <p>I am a strong advocate for each student in my advisory.</p> <p>I support the social and emotional growth of my students and am learning to be comfortable and sensitive when discussing important and sensitive issues and topics with my students.</p>	<p>I develop and nurture relationships with all of the students in my advisory, built on mutual respect, trust, understanding, and empathy.</p> <p>I develop individual relationships with each student in my advisory to get to know their strengths, challenges, interests, passions, and goals.</p> <p>I am a strong advocate for each student in my advisory and I support them in becoming strong advocates for themselves.</p> <p>I support the social and emotional growth of my students and work to create a safe space where most students are comfortable discussing important and sensitive issues and topics.</p> <p>I work with my advisory to create a sense of family and belonging, where every student is known and feels cared for.</p>	<p>I develop and nurture relationships with and among all of the students in my advisory, built on mutual respect, trust, understanding, and empathy.</p> <p>I develop individual relationships with each student in my advisory to get to know and to support their lives outside of school, their cultural heritages, and their strengths, challenges, interests, passions and goals.</p> <p>I am a strong advocate for each student in my advisory and I support them in becoming strong advocates for themselves and each other.</p> <p>I support the social and emotional growth of my students and work to create a safe space where all students are comfortable discussing important and sensitive issues and topics and where students are comfortable bringing up topics they want or need to discuss.</p> <p>I work with my advisory to create a sense of family and belonging, where every student is known and feels cared for by me and by each other.</p>
<p>TC.3.2</p> <p>Nurture trusting relationships with families</p>	<p>I have some understanding of the home life of most students in my advisory.</p> <p>I build trusting relationships with a few of the families of the students in my advisory.</p> <p>I have regular communication with the families of students in my advisory who are struggling academically or with behavior and/or attendance.</p>	<p>I have some understanding of the home life of most students in my advisory and how it impacts their ability to be successful in school.</p> <p>I build trusting relationships with some of the families of the students in my advisory and establish myself as the first point of contact when questions or problems arise.</p> <p>I work with most families to find the best way of establishing proactive and personalized communication to discuss student learning, performance, behavior, attendance, etc.</p>	<p>I have a deep understanding of the home life of most students in my advisory and how it impacts their ability to be successful in school.</p> <p>I build trusting relationships with most of the families of the students in my advisory and establish myself as the first point of contact when questions or problems arise.</p> <p>I work with individual families to find the best way of establishing frequent, proactive, and personalized communication to discuss student learning, performance, behavior, attendance, etc.</p> <p>I demonstrate an understanding of and appreciation for different families' home language, culture, and values.</p>	<p>I have a deep understanding of the home life of each student in my advisory and how it impacts their ability to be successful in school.</p> <p>I build trusting relationships with all of the families of the students in my advisory and establish myself as the first point of contact when questions or problems arise.</p> <p>I work with individual families to find the best way of establishing frequent, proactive, and personalized communication to discuss student learning, performance, behavior, attendance, etc. I establish a partnership with families and share strategies that are effective for supporting their student.</p> <p>I demonstrate an understanding of and appreciation for different families' home language, culture, and values and I recognize the role that identity and background may play in shaping relationships between teachers and families.</p>
<p>TC.3.3</p> <p>Build community and ownership</p>	<p>I occasionally facilitate community-building and responsive/restorative circles as needed.</p> <p>I design activities for my advisory.</p> <p>I need to become more comfortable with mindfulness activities before I can use them with my advisory.</p> <p>I create routines that make our advisory time welcoming and familiar.</p>	<p>I facilitate community-building circles at least once per week and responsive/restorative circles as needed.</p> <p>I engage my students in decision-making about activities for our advisory.</p> <p>I occasionally provide opportunities for students to engage in mindfulness activities.</p> <p>I create a few rituals and routines that make our advisory time welcoming, familiar, and safe.</p>	<p>I facilitate community-building circles multiple times per week and responsive/restorative circles as needed. I support students who ask to facilitate community-building circles.</p> <p>I engage my students in decision-making and encourage them to design and facilitate activities for our advisory.</p> <p>I provide regular opportunities for students to engage in mindfulness activities.</p> <p>With some input from the students in my advisory, I create rituals and routines that make our advisory time welcoming, familiar, safe, and special.</p>	<p>I facilitate community-building circles multiple times per week and responsive/restorative circles as needed. I support each of my students in facilitating at least one community-building circle each year.</p> <p>I engage my students in decision-making and most of my students design and facilitate activities for our advisory.</p> <p>I provide regular opportunities for students to engage in mindfulness activities and reflection experiences.</p> <p>Together with the students in my advisory, we create rituals and routines that make our advisory time welcoming, familiar, safe, and special.</p>
<p>TC.3.4</p> <p>Monitor data and appropriately intervene</p>	<p>I am inconsistent in monitoring the academic, attendance, and behavior data for each student in my advisory.</p> <p>When issues arise (e.g. excessive absences, multiple infractions), I sometimes follow up but with little success.</p>	<p>I regularly monitor the academic, attendance, and behavior data for each student in my advisory.</p> <p>When issues arise (e.g. excessive absences, multiple infractions), I seek to understand the cause of the issues and try to intervene to help solve the problem.</p> <p>I sometimes make time for students to share their success and I sometimes check the data to find areas where my students are succeeding or improving (e.g. shout-outs, perfect or improved attendance, growth in a competency, flipping a portfolio).</p>	<p>I consistently and regularly monitor all data (i.e. academic, attendance, behavior, task completion/overdue, academic and personal goals) for each student in my advisory.</p> <p>When issues arise (e.g. excessive absences, multiple infractions), I seek to understand the cause of the issues and try varied interventions to help solve the problem.</p> <p>I analyze the data to find areas where my students are succeeding or improving; my students share their success with our advisory (e.g. shout-outs, perfect or improved attendance, growth in a competency, flipping a portfolio); and we celebrate these accomplishments.</p>	<p>I consistently and regularly monitor all data (i.e. academic, attendance, behavior, task completion/overdue, academic and personal goals) for each student in my advisory and create systems for me to organize and track success and areas of concern.</p> <p>When issues arise (e.g. excessive absences, multiple infractions), I seek to understand the cause of the issues, try multiple interventions to help solve the problem, and seek additional help and resources if the issues cannot be resolved.</p> <p>I routinely analyze the data to find areas where my students are succeeding or improving; my students share their success with our advisory (e.g. shout-outs, perfect or improved attendance, growth in a competency, flipping a portfolio); and we have created rituals to celebrate these accomplishments.</p>

TC.3 Mentoring Through Advisory

I can create a safe space for me and my students to build trusting and meaningful relationships with each other, where every student is known and feels cared for, and where I challenge and support students in their academic, personal, and social-emotional growth and development.

	Novice	Developing	Proficient	Expert/Mentor
		I occasionally reach out to teachers working with students in my advisory to get ideas about how I can support my students in completing the tasks for their studios.	I reach out to teachers working with students in my advisory to better understand issues or problems (e.g. incomplete tasks, low performance level) and to collaborate to support student success.	I reach out to teachers working with students in my advisory to share effective strategies, to better understand issues or problems (e.g. incomplete tasks, low performance level), and to collaborate to support student success.
TC.3.5 Hold regular one-to-one conferences	I hold one-to-one conferences with every student in my advisory at least once per learning cycle. I need support to develop and implement processes, procedures, and/or activities so that students are meaningfully engaged while I run one-to-one conferences. I am often stopping my conferences to redirect students. I need support or examples to learn how to help my students prepare for one-to-one conferences. I am learning along with my students how to use systems and digital tools (PLP, task and competency dashboards) to monitor their progress and manage their tasks.	I hold one-to-one conferences with every student in my advisory at least once per month. I create processes, procedures, and/or activities so that students are meaningfully engaged while I run one-to-one conferences but find that some students are not productively engaged. I provide my students with a template to use to prepare for one-to-one conferences and support them in completing the template prior to our conference. I support my students in using systems and digital tools (PLP, task and competency dashboards) to monitor their progress and manage their tasks.	I create a schedule to ensure I regularly hold one-to-one conferences with every student in my advisory multiple times per learning cycle. I create processes, procedures, and/or activities to ensure all students are meaningfully engaged, in small groups or independently, while I run one-to-one conferences. I create a protocol, template, or system for one-to-one conferences to support students in analyzing and reflecting on the data in their PLP and in setting academic, personal, and career goals. I support my students in regularly and effectively using systems and digital tools (PLP, task and competency dashboards) to monitor their own data; manage their tasks; and set, track, and monitor their progress toward academic and personal goals.	I create a process or scheduling system to ensure I regularly hold one-to-one conferences with every student in my advisory multiple times per learning cycle and to allow students to sign up for meeting times when they need an additional check-in. I create processes, procedures, and/or activities to ensure all students are meaningfully engaged, in small groups or independently, while I run one-to-one conferences and students help and support each other so conferences are not interrupted. I create a protocol, template, or system for one-to-one conferences to support students in analyzing and reflecting on the data in their PLP, setting academic, personal and career goals and creating and assessing their action plans. Students in my advisory take ownership of the use of systems and digital tools (PLP, task and competency dashboards) to regularly monitor their own data, manage their tasks, and set, track, and monitor their progress toward academic and personal goals.
TC.3.6 Provide opportunities for growth in Personal Development and Habits of Success competencies	I occasionally provide opportunities for students to self-reflect on the Personal Development competencies and to set goals for their personal growth. I occasionally provide time for students to reflect on their personal growth and development but struggle to get everyone to participate. I am inconsistent in providing enough opportunities for students to evidence (demonstrate mastery of) the Habits of Success competencies.	I provide opportunities for students to self-reflect on the Personal Development competencies and to set goals for their personal growth at the beginning of the year, mid-year, and at the end of the year. I provide time for students to record data and reflect on their personal growth and development. I build in opportunities for students to evidence the Habits of Success competencies and am working on ensuring all students have enough opportunities. I provide everyone with feedback to improve their performance levels and show growth. I provide some opportunities for the students in my advisory to build skills and strategies for dealing with conflict, decision-making, managing time and tasks, and managing emotions.	I provide opportunities for students to self-reflect on the Personal Development competencies and to set goals for their personal growth at the beginning of the year and at the end of every learning cycle. I regularly provide time for students to record data and reflect on their personal growth and development and to get feedback from me. I consistently build in opportunities for students to evidence the Habits of Success competencies and provide them with regular feedback to reach higher levels on the continuum and show growth for these skills. I design and facilitate activities to provide opportunities for students in my advisory to build skills and strategies for dealing with conflict, decision making, managing time and tasks, managing emotions, and becoming self-advocates.	I have created a schedule for the year to ensure all of the students in my advisory have the opportunity to self-reflect on the Personal Development competencies and to set goals for their personal growth at regular intervals (i.e., once a month, every six weeks) and I have created a system to track and monitor their growth. I regularly provide time for students to record data and reflect on their personal growth and development in a variety of ways and to get feedback from me and from their peers. I consistently build in opportunities for students to evidence the Habits of Success competencies and individually support them in achieving the highest level on the continuum for these skills through regular feedback and conferencing. My students and/or I design and facilitate activities on a regular basis to build skills and strategies for dealing with conflict, decision making, managing time and tasks, managing emotions, and becoming self-advocates.
TC.3.7 Support post-secondary planning	I support students in developing a post-secondary plan. I provide some opportunities for my students to identify their strengths, interests, and passions. I do not provide feedback to students on resumes, applications, essays, etc.	I can facilitate a process over time to ensure every student in my advisory has created a realistic and actionable post-secondary plan by the time they graduate from high school. I can provide opportunities and support students in identifying their strengths, interests, and passions and using them to inform their post-secondary planning. When asked, I provide feedback to students on resumes, applications, essays, etc. I talk with students about some of the potential barriers to achieving their post-secondary plan.	I can facilitate a process over time to ensure every student in my advisory has created a realistic and actionable post-secondary plan by the time they graduate from high school and I help students find some resources to support their post-secondary planning. I can facilitate a process over time to support students in identifying their strengths, interests, and passions and in choosing a variety of experiences to inform their post-secondary planning. I provide feedback to students on resumes, applications, essays, etc. and support them in identifying, tracking, and meeting deadlines and due dates. I facilitate some activities that allow students to understand and overcome the barriers to achieving their post-secondary plan. (i.e., finding different pathways to achieve their goals, identifying their strengths, interests, and passions and teaching them to access resources.)	I can facilitate a process over time to ensure every student in my advisory has created a realistic and actionable post-secondary plan by the time they graduate from high school and I can provide resources and help students in finding resources to support their post-secondary planning. I can facilitate a process over time to help students identify their strengths, interests, and passions; choose different exposure experiences to eliminate options; and to add options previously not considered—all to make the most informed decisions when developing their post-secondary plans. I provide regular opportunities and make myself available to give feedback and support to students when writing resumes, essays, filling out applications, etc. and I support them in identifying, tracking, and meeting deadlines and due dates. I facilitate a variety of activities that allow students to understand and overcome the barriers to achieving their post-secondary plan (i.e. finding different pathways to achieve their goals, identifying their strengths, interests, and passions and teaching them to access resources). I support students in finding different pathways to achieving their goals.

TC.3 Mentoring Through Advisory

I can create a safe space for me and my students to build trusting and meaningful relationships with each other, where every student is known and feels cared for, and where I challenge and support students in their academic, personal, and social-emotional growth and development.

Novice	Developing	Proficient	Expert/Mentor
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Sources: [RUBRICS FROM THE FRAMEWORK FOR TEACHING](#)

[Educator Competencies for Personalized, Learner-Centered Teaching](#)

[Five Competencies for Culturally Competent Teaching and Learning](#)

The Region X Equity Assistance Center Culturally Responsive Teaching

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TC.4 Designing for Engagement and Impact

I can design meaningful and relevant learning opportunities that address authentic, real-world problems or complex questions and allow students to apply their learning to impact an authentic audience.

	Novice	Developing	Proficient	Expert/Mentor
TC.4.1 Authentic problem frame or question	I can situate my performance task within a meaningful context or scenario that is relevant to students.	<p>I can design a studio that challenges students to solve a problem or answer a question that is relevant to students.</p> <p>I can develop a driving question(s) that guides the overall studio.</p> <p>When identifying a problem for my studio, I recognize and integrate knowledge of individual learners.</p> <p>My problem frame focuses on one issue.</p>	<p>I can design a studio that challenges students to solve a real-world problem or answer a complex question that is highly engaging, interesting, and relevant to students.</p> <p>My problem frame provides the "why" or purpose for learning and I develop a driving question(s) that is broad and guides the overall studio.</p> <p>When identifying a problem for my studio, I recognize and integrate knowledge of individual learners and their community context.</p> <p>My problem frame focuses on one issue that is manageable to explore within a specific time frame.</p>	<p>With input from my students, I can design a studio that challenges students with a complex and authentic problem and question that is highly engaging, interesting, and relevant.</p> <p>My problem frame provides the "why" or purpose for learning and has an open-ended, driving question that guides the overall studio and that connects and propels the learning.</p> <p>When identifying a problem for my studio, I recognize and integrate knowledge of individual learners, diverse cultures, and the community context.</p> <p>My problem frame avoids blame and focuses on one issue that is manageable to explore within a specific time frame.</p>
TC.4.2 Culminating performance tasks aligned to competencies	<p>I can design performance tasks that address the target competencies and are aligned to the continua for each competency.</p> <p>I can design performance tasks that require the application of knowledge and skills and that culminate with students demonstrating their learning by creating an answer, product, or performance.</p> <p>The culminating task aligns to one competency in my content area.</p>	<p>I can design at least two options from which students can choose for the culminating performance task for my studio in alignment with the target competencies (on the roadmap) that addresses the problem frame of my studio.</p> <p>I can design at least two options for a culminating performance task that require the application of knowledge and skills and that culminate with students demonstrating their learning by creating an answer, product, or performance for a specific audience.</p> <p>The culminating task integrates at least two competencies within the same competency area (Reading Critically and Collaborative Discussion).</p>	<p>I can design multiple options from which students can choose for the culminating performance task for my studio. All tasks are in alignment with the target competencies (on the roadmap) and address the problem frame of my studio.</p> <p>I can design multiple options for culminating performance tasks that require students to create an answer, product, or performance, for an authentic audience and purpose, that demonstrates the application of their knowledge and skills at a high level of complexity, rigor, and authenticity (e.g. Bloom's 'Creation', Webb's DOK 3-4).</p> <p>The culminating task effectively integrates two or more competency areas (e.g., ELA and Science, Social Studies and NextGen).</p>	<p>I can design multiple options from which students can choose for the culminating performance task for my studio and I can design a structure to support students in designing their own culminating performance task. All tasks are designed in alignment with the target competencies (on the roadmap) and address the problem frame of my studio.</p> <p>I can design multiple culminating performance tasks that require students to create an answer, product, or performance, for an authentic audience and purpose, that demonstrates the application of their knowledge and skills at a high level of complexity and rigor, and that closely mirrors the responsibilities of a professional (e.g., artist, engineer, lab technician, consumer advocate, investigative journalist).</p> <p>The culminating task effectively integrates multiple competency areas (e.g., ELA, Social Studies, and NextGen).</p>
TC.4.3 Engaging launch	<p>I can preview the competencies and the continua.</p> <p>I can informally pre-assess students content knowledge and skills (i.e. K-W-L, discussion).</p> <p>I can preview necessary content and vocabulary.</p>	<p>I can design a hook that engages my students in the problem.</p> <p>I can clearly communicate the "why" or rationale for the content of this studio.</p> <p>I can preview the competencies, continua, and culminating performance task and provide an exemplar.</p> <p>I can design short pre-assessments (i.e. quiz, survey) to determine the general knowledge and skill levels of my students related to the content and competencies in my studio.</p> <p>I can design activities to build background, content knowledge, and essential vocabulary.</p>	<p>I can design an authentic hook that engages my students in my studio and creates a shared experience.</p> <p>I can clearly communicate the "why" and create a compelling reason for students to engage in the content of this studio.</p> <p>I can preview the competencies, continua, and choices for the culminating performance tasks and provide examples of what success looks like at a various levels.</p> <p>I can design a series of short tasks (cold write, text analysis, self-assessment) to identify individual students' background knowledge and skill levels related to the content and competencies in my studio.</p> <p>I can design a series of activities where students can engage with one another as well as build curiosity, necessary background and content knowledge, and essential vocabulary.</p> <p>I can establish both personal and real-world relevance for students and provide them with an important opportunity to relate this studio to the world around them.</p>	<p>I can design an authentic hook that engages my students and that serves as the driving force for the entire studio, such as a memorable experience (i.e. field trip, simulation)</p> <p>I can clearly communicate the "why" and create a compelling reason for students to engage in the content of this studio to ensure students believe that the content is important and is worth knowing.</p> <p>I can preview the competencies, continua, and culminating performance tasks, provide examples of what success looks like at a various levels, and engage students in using the continua to rate exemplars.</p> <p>I can design a performance-based prior knowledge assessment to identify individual students' background knowledge and skill levels related to the content and competencies in my studio.</p> <p>I can design a series of shared experiences and activities, which includes engaging others (experts in the field, community members, those impacted by the problem, etc.), to build curiosity, a deeper understanding of the problem, necessary background and content knowledge, and essential vocabulary.</p> <p>I can establish both personal and real-world relevance for students and provide them with an important opportunity to relate the subject matter of this studio to the world around them, to specific careers, and to their previously held assumptions and beliefs.</p>
	<p>I have limited understanding of the competencies and concepts and need support with the backwards design process.</p> <p>I can curate appropriate resources and content to support my students' investigations.</p>	<p>I use my understanding of the competencies and concepts and the backwards design process to design activities aligned to the skills and indicators on the continua.</p> <p>I can curate appropriate and authentic resources and content (i.e. primary source documents and accounts, raw data, research, and publications) to support my students' investigations.</p>	<p>I use my understanding of the competencies and concepts and the backwards design process to design activities aligned to skills and indicators on the continua that strategically build toward the culminating performance task.</p> <p>I can curate the most appropriate and authentic resources and content (i.e. primary source documents and accounts, raw data, research, and publications) to support my students' investigations.</p>	<p>I use my extensive understanding of the entire Learning What Matters Competency Framework and the backwards design process to design activities aligned to skills and indicators on the continua that strategically build to the culminating performance task.</p> <p>I can curate the most appropriate and authentic resources and content (i.e. primary source documents and accounts, raw data, research, and publications) that represent diverse perspectives and viewpoints and I can design tasks for students to curate similar resources related to their problem.</p>

TC.4 Designing for Engagement and Impact

I can design meaningful and relevant learning opportunities that address authentic, real-world problems or complex questions and allow students to apply their learning to impact an authentic audience.

	Novice	Developing	Proficient	Expert/Mentor
TC.4.4 Investigate the problem	<p>I can design a few investigative tasks to engage students in evidence gathering, information and/or data analysis, claim development, and reasoning in order to explore the larger context or scenario of the performance task.</p>	<p>I can design a few investigative tasks to engage students in evidence gathering, information and/or data analysis, claim development, and reasoning in order to explore and find solutions to the problem.</p> <p>I can design one experience that provides an opportunity for students to engage directly with people and places outside of the school to more deeply understand the problem (i.e. interview users and experts, provide opportunities for observation, visit relevant location).</p> <p>I can create milestones or benchmarks to ensure students can successfully complete the culminating performance task within a specific timeframe, including a specific time for revision and feedback.</p>	<p>I can design multiple investigative tasks to ensure students engage in evidence gathering, information and/or data analysis, claim development, and reasoning in order to explore and find solutions to the problem.</p> <p>I can design multiple experiences that provide opportunities for students to engage directly with people and places outside of the school to more deeply understand the problem (i.e. interview users and experts, provide opportunities for observation, visit relevant locations).</p> <p>I can create milestones or benchmarks to ensure students are learning the necessary content and skills required to successfully complete the culminating task within a specific timeframe, including specific times for revision and feedback.</p>	<p>I can design multiple investigative tasks that expose students to using a specific design process (i.e. design thinking, engineering design, human-centered design) to ensure students engage in evidence gathering, information and/or data analysis, claim development, and reasoning in order to explore and find solutions to the problem.</p> <p>I can design multiple and varied experiences throughout the investigate phase, that provide opportunities for students to engage directly with people and places outside of the school to more deeply understand the problem (i.e. interview users and experts, provide opportunities for observation, visit relevant locations).</p> <p>I can create milestones or benchmarks to ensure students are learning the necessary content and skills required to successfully complete the culminating task within a specific timeframe, including specific times for multiple rounds of revision and feedback.</p>
TC.4.5 Impact on authentic audience	<p>I can facilitate opportunities for students to share their learning (e.g. celebrations of learning, exhibitions, display student work, student work share fair).</p>	<p>I can facilitate opportunities for students to share their learning with their intended audience.</p> <p>I can facilitate a process to provide students with feedback from their intended audience.</p>	<p>I can provide my students with the support they need to implement their product or performance in an authentic context (real-world application) to impact their intended audience.</p> <p>I can provide students with connections to mentors, advisors, or industry partners who can provide them with feedback.</p> <p>I can provide coaching and support to help students evaluate their plan for impact to ensure that it is realistic.</p>	<p>I can provide my students with the support they need to implement their product or performance in an authentic context (real-world application) to make a real impact on their intended audience and I can help them find ways to extend their impact (through technology, publishing, presenting at conferences, etc.).</p> <p>I can provide students with connections to mentors, advisors, or industry partners who can help them implement their product and provide them with feedback.</p> <p>I can provide coaching and support to help students evaluate their plans for impact to ensure that they are achievable, realistic in scope, and logistically sound.</p>
TC.4.6 Designing for daily facilitation	<p>I can establish daily objectives aligned to the skill or concept I am teaching.</p> <p>I sometimes design mini-lessons, learning activities, and tasks aligned to the indicators on the continua.</p> <p>I design learning activities that are primarily teacher-led.</p> <p>I select texts based on what is most familiar to me.</p> <p>I can design formative assessments to assess student learning.</p> <p>I use at least one type of data in addition to my formative assessments to inform my instruction.</p>	<p>I can create clear, short-term learning outcomes aligned to the skill or concept being addressed.</p> <p>I design mini-lessons, learning activities, and tasks aligned to the skills and indicators on the continua to support skill building.</p> <p>I can design learning activities that sometimes place the cognitive load on students.</p> <p>I can select text at the appropriate level for the grade level I am teaching.</p> <p>I can design multiple types of formative assessments to assess student learning.</p> <p>I analyze multiple forms of data (task completion, formative assessments, competency ratings, standardized assessments) to make real-time instructional adjustments.</p>	<p>I can create clear, short-term learning outcomes aligned to the skill or concept being addressed at the appropriate performance level.</p> <p>I design targeted mini-lessons, learning activities, and tasks that are aligned to the skills and indicators on the continua and support the intentional building of necessary skills.</p> <p>I can design learning activities that place the cognitive load on students and incorporate student voice and choice.</p> <p>I can select text at the appropriate level of quantitative and qualitative complexity for my students that represents diverse perspectives.</p> <p>I can design multiple and varied types of formative assessments to assess student learning and to inform my instructional design.</p> <p>I regularly analyze multiple forms of data (task completion, formative assessments, competency ratings, standardized assessments) to make real-time instructional adjustments and to modify student groupings.</p> <p>I design additional tasks from which students can choose to raise their performance level, show growth, complete a portfolio, and/or accelerate.</p>	<p>I can create clear, short-term learning outcomes aligned to the skill or concept being addressed at the appropriate performance level that support the problem frame and culminating task.</p> <p>I design targeted and scaffolded mini-lessons, learning activities, and tasks that are aligned to the skills and indicators on the continua and support the intentional building of necessary skills.</p> <p>I consistently design learning activities that place the cognitive load on students and incorporate student voice and choice at high levels of autonomy.</p> <p>I can select text at the appropriate level of qualitative and quantitative complexity for my students that represents diverse writers, perspectives, viewpoints, beliefs, and cultures.</p> <p>I can design multiple and varied types of formative assessments and I choose the type of formative assessment that will give me the specific data I need to evaluate my students' understanding of skills and content and to inform my instructional design.</p> <p>I regularly analyze multiple forms of data (task completion, formative assessments, competency ratings, standardized assessments) to determine progress toward intended outcomes, to make real-time instructional adjustments, and to modify student groupings.</p> <p>I can design additional tasks aligned to multiple competency areas from which students can choose to raise their performance level, show growth, complete a portfolio, and/or accelerate.</p>

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Sources: RUBRICS FROM THE FRAMEWORK FOR TEACHING

Educator Competencies for Personalized, Learner-Centered Teaching

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TC.5 Facilitating Personalized Learning

I can create a personalized learning environment where students are accountable for their own learning and I regularly use data, systems, and technology to differentiate, adapt, and provide access as I support each student in developing their personalized pathway.

	Novice	Developing	Proficient	Expert/Mentor
<p>TC.5.1</p> <p>Safe, structured and flexible learning environment</p>	<p>I need support to develop and implement clear routines and procedures to create and to maintain a safe physical and intellectual environment.</p> <p>I am working on my responses to behaviors that interfere with learning. I sometimes get frustrated and am not as effective as I could be in creating an environment of respect and rapport.</p> <p>I develop relationships with some students but struggle to connect with all students.</p> <p>My learning space is visually inviting, clean, and organized.</p>	<p>I sometimes use routines, procedures, and proactive responses to create and maintain a safe physical and intellectual environment.</p> <p>I create and maintain an environment of respect and rapport that results in some students engaging in respectful interactions with adults and peers.</p> <p>I develop and sustain relationships with many students who are actively engaged in learning and I am trying to build relationships with the students with whom I have not yet connected.</p> <p>My learning space is visually inviting, clean, and organized and flexible.</p>	<p>I use consistent routines, procedures, and proactive responses to create and maintain a safe physical and intellectual environment where students take academic risks and seek help when needed.</p> <p>I create an environment of respect and rapport that results in most students engaging in respectful interactions with adults and peers and where most behaviors that interfere with learning are prevented.</p> <p>I develop and sustain relationships with most of my students and most students are actively engaged in the learning process.</p> <p>My learning space is visually inviting, clean, and organized and is arranged to support a variety of different learning tasks, student groupings, and different learners.</p> <p>I reflect on and share my efforts to create a respectful learning environment with my students.</p>	<p>I use consistent rituals, routines, procedures, and proactive responses to create and maintain a safe physical and intellectual environment where learning time is maximized and students feel comfortable taking academic risks and seeking help when needed.</p> <p>I create and maintain an environment of respect and rapport that results in all students engaging in respectful interactions with adults and peers and playing an active role—individually and collectively—in preventing behaviors that interfere with learning.</p> <p>I develop and sustain relationships with my students that result in high levels of active student engagement in the learning process.</p> <p>My learning space is visually inviting, clean, and organized and is arranged to support a variety of different learning tasks and different learners. I can easily reconfigure my learning environment to best meet the task at hand.</p> <p>I reflect on and share my efforts to create a respectful learning environment with my students and I ask for their feedback to ensure all students feel respected.</p>
<p>TC.5.2</p> <p>Performance-based and formative assessment aligned to the competencies and continua</p>	<p>I ensure that most students understand the task(s) and competencies on which they are working .</p> <p>I review and explain the continua for each competency on which students are working and ensure they have access to all of the needed continua.</p> <p>I sometimes use formative assessments (e.g. self-assessment, exit tickets, student surveys) to ensure students have gained the necessary skills and knowledge.</p>	<p>I ensure that every student understands on which task(s) and competencies they are working and on what level of the continua they need to achieve.</p> <p>I review and explain the continua for each competency on which students are working, ensure they have access to all of the needed continua and provide at least one exemplar for each task.</p> <p>I sometimes use formative assessments (e.g. self-assessment, exit tickets, student surveys) in a timely manner to monitor learner progress, guide my decision making and instructional practice, and ensure students have gained the necessary skills and knowledge to complete the performance-based assessments.</p>	<p>I ensure that every student understands on which task(s) and competencies they are working and on what level of the continua they need to achieve. I consistently reinforce why the task is relevant.</p> <p>I review and explain the continua for each competency on which students are working, ensure they have access to all of the needed continua and I provide exemplars of what success looks like at different levels on the continua.</p> <p>I use frequent formative assessments (e.g. self-assessment, exit tickets, student surveys) in a timely manner to monitor learner progress, guide my decision making and instructional practice, and ensure students have gained the necessary skills and knowledge to complete the performance-based assessments at the desired level on the continua.</p>	<p>I ensure that every student understands on which task(s) and competencies they are working and on what level of the continua they need to achieve. I consistently reinforce why the task is relevant and how the learning is connected to the larger problem frame.</p> <p>I review and explain the continua for each competency on which students are working, ensure they have access to all of the needed continua and I provide annotated exemplars of what success looks like at different levels on the continua for every task.</p> <p>I use multiple, varied and frequent formative assessments (e.g. self-assessment, exit tickets, student surveys) in a timely manner to engage learners in their own growth, monitor learner progress, guide my decision making and instructional practice, and ensure students have gained the necessary skills and knowledge to complete the performance-based assessments at the desired level on the continua.</p>
<p>TC.5.3</p> <p>Higher level thinking and high quality content</p>	<p>I present concepts that engage learners and sometimes invite students to think deeply about the content.</p> <p>I communicate concepts within my content that are of interest to me.</p> <p>I engage students in learning activities and discussions about content mostly to see if they can recall the content I have taught.</p> <p>I am inconsistent in providing all students opportunities to collaborate.</p> <p>I focus on how students apply their learning (products of thinking) rather than on the process of thinking.</p>	<p>I present concepts that engage learners in critical thinking.</p> <p>I communicate concepts associated with my content area(s). Some are critical to the subject-matter while others are of interest to me.</p> <p>I sometimes engage students in challenging and high quality content through learning activities and discussions that require higher level thinking.</p> <p>I provide students with a few opportunities to collaborate.</p> <p>I use think alouds to model my process of thinking (metacognition).</p>	<p>I present concepts that draw on material from diverse writers, perspectives, and viewpoints in order to engage learners in critical thinking.</p> <p>I communicate key concepts associated with my content area(s) (e.g. Algebra teachers need to know which concepts are necessary for college and career readiness, which are foundational, which are more complex, and how to explain the math in multiple ways).</p> <p>I engage students in challenging and high quality content through learning activities and discussions that require higher level thinking and identifying and addressing misconceptions as they arise.</p> <p>I create opportunities for students to work together to focus on some of the essential skills of collaboration (i.e. listening, understanding different perspectives, working together, managing conflict).</p> <p>I use modeling (think alouds and annotation), rehearsal (guided practice), and feedback techniques that highlight the processes of thinking (metacognition) rather than focusing exclusively on the products of thinking.</p>	<p>I present concepts both within and across disciplines that draw on material from diverse writers, perspectives, and viewpoints in order to engage learners in critical thinking.</p> <p>I communicate key concepts associated with my content area(s) (e.g. Algebra teachers need to know which concepts are necessary for college and career readiness, which are foundational, which are more complex, and how to explain the math in multiple ways) and I use my knowledge of learning progressions in order to build students' solid understanding of the content I want them to learn.</p> <p>I engage students in challenging and high quality content through learning activities and discussions that require complex and higher level thinking and identifying and addressing misconceptions as they arise.</p> <p>I create multiple opportunities for students to work together to build the essential skills of collaboration (i.e. listening, understanding different perspectives, working together, managing conflict).</p> <p>I use modeling (think alouds and annotation), rehearsal (guided practice), and feedback techniques that highlight the processes of thinking (metacognition) rather than focusing exclusively on the products of thinking and provide opportunities for students to reflect on and discuss their own thinking.</p>

TC.5 Facilitating Personalized Learning

I can create a personalized learning environment where students are accountable for their own learning and I regularly use data, systems, and technology to differentiate, adapt, and provide access as I support each student in developing their personalized pathway.

	Novice	Developing	Proficient	Expert/Mentor
	I ask questions to check for comprehension, understanding, and recall of the content I have taught.	I ask questions that check for recall and understanding but also include some higher level questions that require analysis and evaluation.	I ask questions that require analysis, evaluation and challenging each other's thinking.	I ask questions and teach students to ask questions that require analysis, evaluation and challenging each other's thinking.
TC.5.4 Scaffolding and differentiation	I set and maintain high expectations for achievement for some of my students.	I set high expectations for achievement for all of my students, but sometimes have difficulty maintaining those expectations.	I set and maintain explicit and high expectations for achievement for all of my students and support my students in reaching common learning goals at a variety of levels.	I set and maintain explicit and high expectations for achievement for all of my students while designing multiple and varied pathways for my students to reach common learning goals at a variety of levels.
	I need support to address specific differences in individual students' learning needs, abilities, styles, interests, cultures, and levels of readiness.	I use a few teaching strategies to address specific differences in individual students' learning needs, abilities, styles, interests, cultures, and levels of readiness.	I use several different teaching strategies to address specific differences in individual students' learning needs, abilities, styles, interests, cultures, and levels of readiness.	I use a variety of teaching strategies, such as tiered supports and scaffolded instruction, to address specific differences in individual students' learning needs, abilities, styles, interests, cultures, and levels of readiness.
	I need support in order to understand how to address learning gaps while teaching grade level content.	I scaffold instruction so that most learners can master the content and skills and fill in gaps in understanding.	I scaffold instruction so that all learners can master the content and skills and fill in gaps in understanding.	I customize and scaffold instruction, supports, and pacing so that all learners can master the content and skills and fill in gaps in understanding.
	I mostly teach whole class lessons then have students work independently on what I taught.	I minimally adjust student groupings (e.g. whole group, small group, collaborative projects, one-to-one conferences) to accommodate the different learning needs of my students.	I sometimes vary student groupings (e.g. whole group, small group, collaborative projects, one-to-one conferences) to accommodate the different learning needs of my students.	I consistently vary student groupings (e.g. whole group, small group, collaborative projects, one-to-one conferences) to accommodate the different learning needs of my students.
	I am not sure how to adapt my instruction, materials, and assessments to make challenging material accessible to all students, including English language learners and students with disabilities and I need support to do this effectively.	I try to adapt instruction, materials, and assessments to make challenging material accessible to all students, including English language learners and students with disabilities, but I am sometimes unsure of the best way to do that while still maintaining high expectations.	On my own and together with my colleagues, I adapt instruction, materials, and assessments to make challenging material accessible to all students, including English language learners and students with disabilities, while still maintaining high expectations.	I consistently adapt instruction, materials, and assessments to make challenging material accessible to all students, including English language learners and students with disabilities, while still maintaining high expectations.
TC.5.5 Personalization	I assign topics and tasks to students and will occasionally provide my students with choice by providing them with one or two options for topics or for how they demonstrate their learning.	I provide my students with cognitive choice by involving them in making decisions about the topics they are learning about.	I provide my students with cognitive choice by involving them in making decisions about the topics they are learning about and how they demonstrate their learning.	I provide my students with cognitive choice by involving them in making decisions about how and where they learn, the topics they are learning about, and how they demonstrate their learning.
		I create some opportunities for students to meet or exceed desired levels on the continua by using a few instructional strategies (e.g. mini lessons, feedback, conferencing, templates, graphic organizers).	I create opportunities for each student to meet or exceed desired levels on the continua by using a variety of instructional strategies (e.g. mini lessons, feedback, conferencing, templates, graphic organizers).	I create multiple and structured opportunities for each student to meet or exceed desired levels on the continua by using a variety of instructional strategies (e.g. mini lessons, feedback, conferencing, templates, graphic organizers).
	I usually have students working at the same pace and occasionally will allow a few students to work ahead.	I encourage students to work at their own pace and begin to take some ownership of their learning.	I create a learning environment that builds students' ability to engage in self-paced learning, and that encourages students to take ownership of their learning.	I create a learning environment that builds students' ability to engage in self-directed and self-paced learning, and that encourages students to take ownership of their learning.
TC.5.6 High-quality work through feedback and revision		I encourage my students to pursue solving problems they are passionate about.	I encourage my students to pursue solving problems they are passionate about and to design their own performance tasks aligned to the continua based on needed competencies.	I encourage my students to pursue solving problems they are passionate about, to design their own performance tasks aligned to the continua, and to implement their learning in the world to make an impact.
	I am inconsistent in my expectations for work quality and sometimes accept work that I rate very low on the continua.	I expect quality work from my students but sometimes do not require students to revise their work.	I consistently demonstrate high expectations for the quality of student work and require students to engage in more than one round of revision if the task does not meet the expectations of their performance level.	I consistently demonstrate high expectations for the quality of student work and the perseverance and effort required to produce it, and require students to engage in several rounds of revision if the task does not meet the expectations of their performance level.
	I encourage my students to go through at least one revision cycle for each task.	I encourage my students to set high expectations for themselves to raise their performance levels by completing at least one feedback and revision cycle for each task.	I encourage my students to set high expectations for themselves to produce high-quality work through multiple feedback and revision cycles.	I encourage students to set high expectations for themselves and for each other to produce high-quality work through multiple feedback and revision cycles.
	I give most of my students continua-based feedback before they submit their final performance task(s).	I give continua-based feedback to most of my students throughout the learning cycle.	I give timely and actionable continua-based feedback to all of my students throughout the learning cycle.	I give timely, specific, and actionable continua-based feedback to all of my students multiple times throughout the learning cycle.
	I teach my students how to give continua-based feedback to each other to improve performance levels and provide them with the opportunity to get feedback from at least one other student.	I teach my students how to give and use constructive, continua-based feedback to improve performance levels and I provide them with opportunities to get feedback from several other students.	I teach my students how to give and use constructive, continua-based feedback to improve performance levels. I provide multiple opportunities for students to give and receive feedback.	
	I incorporate time for activities through which students use the continua to self-assess.	I incorporate time for activities through which students use the continua to self-assess and to reflect on their progress.	I incorporate time for activities through which students use the continua to self-assess, to reflect on their progress and to set goals for increasing their performance level and/or growth.	
	I am inconsistent in my use of the task dashboard and the competency dashboard and do not always keep up with rating student work, marking tasks complete, and/or sending tasks back for revision.	I consistently use the task dashboard and the competency dashboard to manage student tasks. I am working to be more consistent in providing timely ratings and feedback.	I consistently use the task dashboard and the competency dashboard to manage student tasks, provide timely ratings, and opportunities for revision and feedback.	I consistently use the task dashboard and the competency dashboard to manage and differentiate student tasks, provide timely ratings, and opportunities for revision and feedback.

TC.5 Facilitating Personalized Learning

I can create a personalized learning environment where students are accountable for their own learning and I regularly use data, systems, and technology to differentiate, adapt, and provide access as I support each student in developing their personalized pathway.

	Novice	Developing	Proficient	Expert/Mentor
<p>TC.5.7</p> <p>Use systems to organize, manage, and analyze data to inform instruction</p>	<p>I am inconsistent in my use of systems to track student behavior, attendance, and voice (i.e. student log, studio attendance, ensuring all students take surveys).</p> <p>I use objective data that has been collected and organized for me (i.e. student voice, behavior, attendance, competency progress, and standardized assessments) to inform my instructional practice.</p> <p>I use tools when I am instructed to during professional development (progress look-up, student and teacher PLPs, competency and task dashboards) to identify which students are not on track for portfolio completion and the reasons why.</p>	<p>I am fairly consistent in my use of systems to track student behavior, attendance, and voice (i.e. student log, studio attendance, ensuring all students take surveys).</p> <p>I organize and analyze objective data from a few sources (i.e. student voice, behavior, attendance, competency progress, and standardized assessments). I use that data to inform my instructional practice.</p> <p>I occasionally use tools (progress look-up, student and teacher PLPs, competency and task dashboards) to identify which students are not on track for portfolio completion and the reasons why and use that information to modify my instruction and supports for those students.</p>	<p>I am consistent in my use of systems to track student behavior, attendance, and voice (i.e. student log, studio attendance, ensuring all students take surveys) ensuring that I track all infractions, provide students with shout-outs, take daily attendance, and have high completion rates for student surveys.</p> <p>I collect, organize, and analyze objective data from multiple sources, including student voice, behavior, attendance, competency progress, and standardized assessments. I use that data to inform my instructional practice and to help me reflect on and improve my practice.</p> <p>I regularly use tools (progress look-up, student and teacher PLPs, competency and task dashboards) to understand individual skills, gaps, strengths and weaknesses of each student, and use that information to create additional opportunities to ensure my students meet performance level and growth targets, complete their portfolios and accelerate when appropriate.</p>	<p>I consistently and routinely use systems to track student behavior, attendance, and voice (i.e. student log, studio attendance, ensuring all students take surveys) ensuring that I track all infractions, provide students with shout-outs often, take daily attendance, and have high completion rates for student surveys as well as creating ways to gain information from students about other factors that are important to their success (i.e. interest, engagement, relationships).</p> <p>I collect, organize, and analyze objective data from multiple sources, including student voice, behavior, attendance, competency progress, and standardized assessments. I draw appropriate and actionable conclusions to inform short and long-term instructional decisions and to help me reflect on and improve my practice.</p> <p>I regularly and systematically use tools (progress look-up, student and teacher PLPs, competency and task dashboards) to understand individual skills, gaps, strengths, weaknesses, interests, and aspirations of each student, and use that information to design and modify personalized learning pathways toward meeting performance level and growth targets, completing portfolios and accelerating whenever possible.</p>
<p>TC.5.8</p> <p>Enhance learning with digital tools</p>	<p>I mostly use technology to replace non-digital tools (i.e. digital worksheets, digital agendas, digital assignments, etc.)</p> <p>I mostly rely on my students to use digital tools and websites they are familiar with, but am unable to monitor or support them in their use.</p> <p>I use digital resources that have been created and I am learning how to adapt them appropriately.</p>	<p>I use technology as an effective tool to perform common tasks more efficiently (i.e. exit ticket or survey using Google Form).</p> <p>I expose students to a few digital tools I am comfortable using and a few websites I know are safe and accurate for information gathering.</p> <p>I often adapt high-quality digital resources or use ones that have already been created. I try to create my own digital resources but the quality is inconsistent.</p>	<p>I require technology use on a regular basis to enhance teaching, learning, and student impact (i.e. teacher and peer feedback, audio recordings, multimedia presentations).</p> <p>I promote the development of “digital fluency” in my students by exposing them to a variety of digital tools for different purposes.</p> <p>I regularly create and adapt high-quality digital resources.</p> <p>I use digital tools and content to promote and enhance collaboration.</p>	<p>I require technology use on a regular basis to enhance teaching, learning, and student impact and I support my students in using technology to create tasks and products that would otherwise not be possible (i.e. website published, documentary publication, app creation).</p> <p>I promote the development of “digital fluency” in my students by supporting them in choosing the most appropriate tools and technologies for the task and in understanding why they are the best choice.</p> <p>I consistently create and adapt high-quality Google site studios and digital resources.</p> <p>I use digital tools and content to promote and enhance collaborative and real-world project-based learning opportunities.</p> <p>I can discern when the use of technology improves engagement, collaboration, and learning, and when it does not.</p>

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Author: [Sandra Moumoutjis for Building 21](#)

Sources: [RUBRICS FROM THE FRAMEWORK FOR TEACHING](#)

[Educator Competencies for Personalized, Learner-Centered Teaching](#)

[Learning Environment Rubric - LearnDC](#)

[Massachusetts Model System for Educator Evaluation](#)

[Five Competencies for Culturally Competent Teaching and Learning](#)

[The Region X Equity Assistance Center Culturally Responsive Teaching](#)

Last edited: 2019-07-27

Ethnicity/Race	# of Students	Percentage (%)
American Indian or Alaska Native	0	0%
Asian	30	3%
Black or African American	270	30%
Hispanic	150	17%
Native HI or Pacific Islander	0	0%
Two or More Races	30	3%
White	420	47%
EDS Subgroups	259	29%
Economically Disadvantaged Stude	117	13%
Students with Disabilities	90	10%
English Language Learners	50	6%
Students Experiencing Homelessne	2	1%



Dear NC Charter School Advisory Board,

I am writing to express District C's strong support for the new K-8 charter school, Carolina Achieve. As co-founder of District C, an organization that works closely to connect students from all types of schools around NC with businesses and organizations through meaningful educational collaborations, I believe that Carolina Achieve has the potential to provide a unique and high-quality educational experience to students in North Carolina.

I am particularly impressed with Tiffany Alrefae's leadership and vision for the school, as well as the school's commitment to serving a diverse student population. We believe that this approach aligns closely with our own mission to support educational equity and excellence for all students.

As an organization with expertise in educational innovation and entrepreneurship, we are eager to support Carolina Achieve in any way we can. In particular, we believe that our experience in designing and launching innovative educational programs can be of significant value to the school as it seeks to establish itself in the community.

Furthermore, we believe that there is a great opportunity to connect the school with the greater Triangle business community as they seek to incorporate our Teamship program into their curriculum. We have strong relationships with local businesses and organizations, and we believe that we can help Carolina Achieve forge meaningful partnerships with these entities. These partnerships could take many forms, including mentorship programs, internship opportunities for students, and collaborations on curriculum design. We understand that the school is committed to building a strong culture of collaboration and teamwork among its students and faculty. Our team of experienced professionals can offer guidance on effective team-building strategies and best practices.

We believe that our collaboration with Carolina Achieve will benefit not only the students at the school but also the broader educational community in North Carolina. We are committed to working closely with Tiffany Alrefae and the school's leadership team to ensure the success of this innovative new charter school.

Thank you for your consideration, and we look forward to the opportunity to work with Carolina Achieve.

Sincerely,

A handwritten signature in black ink, appearing to read "Anne Jones".

Anne Jones
Co-Founder, District C



Alamance Community School

195 Kronbergs Court
Haw River, NC 27258

April 13, 2023

To Whom It May Concern:

I have had the pleasure of meeting with Tiffany Alrefae, Founding Head of School at Carolina Achieve, multiple times and have agreed to be her mentor and support Carolina Achieve Charter School in Orange County, NC.

Having had the experience of starting two charter schools, Voyager Academy in Durham, NC and Alamance Community School in Haw River, NC, I know firsthand how hard it is to open a school. I believe that we, charter schools and charter school leaders, should work together and we all improve when we support each other.

I am committed to helping Tiffany and Carolina Achieve in any way possible, including, but not limited to charter application assistance, academic program and curriculum development, operations guidance, and onsite visits. I am confident that Orange County will benefit from an additional school choice. Please feel free to contact me if you have any questions.

Best,

Leslie Hall Paynter, M.Ed.

Managing Director

Alamance Community School

TO: Charter School Advisory Board Members, State Board of Education
FR: Laura Boyd Smidt, INCubatoredu Program Specialist
RE: Carolina Achieve Charter Application
Date: March 29, 2023

To Whom It May Concern,

I was excited to learn of the possibility of a new K-8 public tuition-free school in the West Triangle area that will serve students in Orange County, Chapel Hill, Durham, Eastern Alamance, Chatham County, and Wake County. After speaking with Tiffany Alrefae, the Founding Head of School about the vision for the school, I believe that students and their families from the West Triangle Area would see this school as an excellent additional option for K-8th grade.

Tiffany and I have met numerous times during the past year to discuss the mission and vision of Carolina Achieve and how it aligns with the characteristics of an Uncharted Learner. Nurturing skills such as creative problem solving, critical thinking and speaking with a purpose prepares students to fail forward, learn and be resilient. In over 250 schools across the nation, we have seen this belief become a reality. With experiential project based learning, students thrive.

Carolina Achieve students will explore entrepreneurial concepts such as opportunity recognition, design thinking, and empathy as they progress through their K-8 education. With these skills, they will be better prepared for any career path and for our ever changing world of work.

Uncharted Learning, a not for profit organization, enthusiastically supports the charter school application of Carolina Achieve. I can confidently say that, if approved, Carolina will have a significant and positive impact on the students in the community and the community as a whole.

Sincerely,

Laura Boyd Smidt

Laura Boyd Smidt
Uncharted Learning, NFP
INCubatoredu Program Specialist

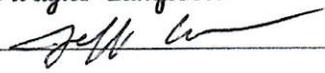
Charter School Required Signature Certification

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.

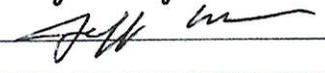
- ❖ The selected Board Attorney that he/she has reviewed with the full Board of Directors, listed within the application, all the governance documents and liabilities associated with being on the Board of a Non-Profit Corporation.

- o Name of the Selected Board Attorney: Larry Robbins
- o Date of Review: March 3, 2023
- o Signature of Board Members Present (Add Signature Lines as Needed):

- *Anjanette Miller*
- *Dwayne Campbell*
- 
- _____
- _____
- _____
- _____

- ❖ 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.

- o Name of the Selected Board Auditor: Jacob Allen
- o Date of Review: April 3, 2023
- o Signature of Board Members Present (Add Signature Lines as Needed):

- *Anjanette Miller*
- *Dwayne Campbell*
- 
- _____
- _____
- _____
- _____

- ❖ 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.

- o Name of the Contact for Selected EMO/CMO: _____
- o Date of Review: _____
- o Signature of Board Members Present (Add Signature Lines as Needed):

- Jeff Cunn
- _____
- _____
- _____
- _____
- _____

- ❖ 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.

- o Name of the Contact: Kathy Davies
- o Name of the Selected Financial Service Provider: Acadia North Star
- o Date of Review: Apr 21, 2023
- o Signature of Board Members Present (Add Signature Lines as Needed):

- *Anjanette Miller*
- Jeff Cunn
- _____
- _____
- _____
- _____
- _____

- ❖ 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.

- o Name of the Contact: Kathy Davies
- o Name of the Selected PowerSchool Service Provider: Acadia North Star
- o Date of Review: Apr 21, 2023
- o Signature of Board Members Present (Add Signature Lines as Needed):

- *Anjanette Miller*
- Jeff Cunn
- _____
- _____
- _____
- _____
- _____

Certification

I, _____, 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 _____ Charter School is true and correct in every respect.

Signature _____



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.
 - o Name of the Selected Board Attorney: Larry Robbins
 - o Date of Review: March 3, 2023
 - o Signature of Board Members Present (Add Signature Lines as Needed):
 - *Anjanette Miller*
 - *Dwayne Campbell*
 - 
 - *John Oxaal*
 - *MaKayla Booker*
 - _____ *Charles Lopez* _____
 - _____

- ❖ 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.
 - o Name of the Selected Board Auditor: Jacob Allen
 - o Date of Review: April 3, 2023
 - o Signature of Board Members Present (Add Signature Lines as Needed):
 - *Anjanette Miller*
 - *Dwayne Campbell*
 - 
 - _____ *John Oxaal* _____
 - *MaKayla Booker*
 - _____ *Charles Lopez* _____

- ❖ 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.

- o Name of the Contact for Selected EMO/CMO: _____
- o Date of Review: _____
- o Signature of Board Members Present (Add Signature Lines as Needed):

- _____
- _____
- _____
- _____
- _____
- _____

- ❖ 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.

- o Name of the Contact: Kathy Davies
- o Name of the Selected Financial Service Provider: Acadia North Star
- o Date of Review: Apr 21, 2023
- o Signature of Board Members Present (Add Signature Lines as Needed):

- *Anjanette Miller*
- 
- *John Oxaal* _____
- *Dwayne Campbell* _____
- *MaKayla Booker*
- *Charles Lopez* _____
- _____

- ❖ 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.

- o Name of the Contact: Kathy Davies
- o Name of the Selected PowerSchool Service Provider: Acadia North Star
- o Date of Review: Apr 21, 2023
- o Signature of Board Members Present (Add Signature Lines as Needed):

- *Anjanette Miller*
- 
- *John Oxaal* _____
- *Dwayne Camobell* _____
- *MaKayla Booker*
- *Charles Lopez* _____
- _____

Certification

I, *John Oxaal*, 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 Carolina

Achieve _____ Charter School is true and correct in every respect.

Signature John Oxaal _____

Date: April 20, 2023

- ❖ 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:

- Date of Review:

- Signature of Board Members Present (Add Signature Lines as Needed):

- _____
 - _____
 - _____
 - _____
 - _____
 - _____
 - _____

- ❖ 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:

KATHY DAVIES

Kathy Davies

- Name of the Selected Financial Service Provider:

ACADIA NORTH STAR

- Date of Review:

APRIL 21 2023

- Signature of Board Members Present (Add Signature Lines as Needed):

- _____
 - _____
 - _____
 - _____
 - _____
 - _____
 - _____

- ❖ 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:

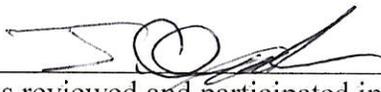
- Name of the Selected PowerSchool Service Provider:

- Date of Review:

- Signature of Board Members Present (Add Signature Lines as Needed):

- _____
 - _____
 - _____
 - _____
 - _____
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 - _____

Certification

I, , 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 _____ Charter School is true and correct in every respect.

Signature 

Date 4/22/23



TENNIS COURTS

TENNIS CENTER

SKATE PARK

ENTRANCE FROM US 70A

BASEBALL FIELDS

ENTRANCE FROM LAWRENCE ROAD

SCHOOL PLAYING FIELDS

HIGH SCHOOL

K-8 SCHOOL

WALKING PATHS

LAWRENCE ROAD

1-85 CORRIDOR

SUMMIT
DESIGN AND ENGINEERING SERVICES

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Hillsborough, NC

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DRAWING ALTERATION

IT IS A VIOLATION OF LAW FOR ANY PERSON, UNLESS ACTING UNDER THE DIRECTION OF LICENSED ARCHITECT, PROFESSIONAL ENGINEER, LANDSCAPE ARCHITECT, OR LAND SURVEYOR TO ALTER ANY FEES ON THIS DOCUMENT IN ANY WAY. ANY LICENSEE WHO ALTERS THIS DOCUMENT IS REQUIRED BY LAW TO AFFIX HIS OR HER SEAL AND THE NOTATION "ALTERED" IS FOLLOWED BY HIS OR HER SIGNATURE AND SPECIFIC DESCRIPTION OF THE ALTERATIONS.

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

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

LEA #1: 320-Durham Public

What percentage of students from t

LEA #2: 680-Orange

What percentage of students from t

LEA #3:

What percentage of students from t

Grade	Year 1			Year 2			
	LEA #1	LEA #2	LEA #3	LEA #1	LEA #2	LEA #3	LEA #1
	320	680		320	680		320
Kindergarten	40	60		40	60		40
Grade 1	40	60		40	60		40
Grade 2	20	30		40	60		40
Grade 3	20	30		20	30		40
Grade 4	20	30		20	30		20
Grade 5	20	30		20	30		20
Grade 6				20	30		20
Grade 7							20
Grade 8							
Grade 9							
Grade 10							
Grade 11							
Grade 12							
LEA Totals:	160	240	0	200	300	0	240

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).



ects to enroll. In addition,
ose on the initial cover page.

icular level.

he LEA selected above will qualify for EC funding?	10%
--	-----

he LEA selected above will qualify for EC funding?	10%
--	-----

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
680		320	680		320	680	
60		40	60		40	60	
60		40	60		40	60	
60		40	60		40	60	
60		40	60		40	60	
30		40	60		40	60	
30		20	30		40	60	
30		20	30		20	30	
30		20	30		20	30	
		20	30		20	30	
					20	30	
360	0	280	420	0	320	480	0

et 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:		320-Durham Public		
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds	\$6,337.20	160	\$1,013,952.00	
Local Funds	\$4,486.56	160	\$717,849.60	
State EC Funds	\$5,275.72	16	\$84,411.52	
Federal EC Funds	\$1,514.35	16	\$24,229.60	
			Total:	\$1,840,442.72

LEA #2:		680-Orange		
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds	\$6,386.82	240	\$1,532,836.80	
Local Funds	\$4,808.00	240	\$1,153,920.00	
State EC Funds	\$5,275.72	24	\$126,617.28	
Federal EC Funds	\$1,514.35	24	\$36,344.40	
			Total:	\$2,849,718.48

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	\$ 2,546,789	\$ 3,183,486	\$ 3,820,183	\$ 4,456,880
Local Per Pupil Funds	\$ 1,871,770	\$ 2,339,712	\$ 2,807,654	\$ 3,275,597
State EC Funds	\$ 211,029	\$ 263,786	\$ 316,543	\$ 369,300
Federal EC Funds	-	\$ 60,574	\$ 90,861	\$ 106,005
Other Funds*				
Working Capital*				
TOTAL REVENUE:	\$ 4,629,587	\$ 5,847,558	\$ 7,035,242	\$ 8,207,782

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



on federal funding in

Year 5	
\$	5,093,578
\$	3,743,539
\$	422,058
\$	121,148
\$	9,380,322

Additional questions by
creating budget, please
these funds. If these

ix 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
Administrative & Support Personnel															
Lead Administrator	1	\$ 100,000	\$ 100,000	1	\$ 103,000	\$ 103,000	1	\$ 106,000	\$ 106,000	1	\$ 109,000	\$ 109,000	1	\$ 112,500	\$ 112,500
Assistant Administrator		\$ -	\$ -		\$ -	\$ -	1	\$ 65,000	\$ 65,000	1	\$ 66,950	\$ 66,950	1	\$ 68,958	\$ 68,958
Finance Officer		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Clerical	2	\$ 38,000	\$ 76,000	2	\$ 39,000	\$ 78,000	2	\$ 40,170	\$ 80,340	2	\$ 41,375	\$ 82,750	2	\$ 42,616	\$ 85,232
Food Service Staff		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Custodians		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Transportation Staff		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Nurse	1	\$ 50,000	\$ 50,000	1	\$ 51,500	\$ 51,500	1	\$ 53,045	\$ 53,045	1	\$ 54,636	\$ 54,636	1	\$ 56,275	\$ 56,275
Counselor	1	\$ 50,000	\$ 50,000	1	\$ 51,500	\$ 51,500	1	\$ 53,045	\$ 53,045	2	\$ 54,636	\$ 109,272	2	\$ 56,275	\$ 112,550
Operations Manager	1	\$ 60,000	\$ 60,000	1	\$ 61,800	\$ 61,800	1	\$ 63,554	\$ 63,554	1	\$ 65,563	\$ 65,563	1	\$ 67,530	\$ 67,530
*** Edit text as needed. ***		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
*** Edit text as needed. ***		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Total Admin and Support:	6		\$ 336,000	6		\$ 345,800	7		\$ 420,984	8		\$ 488,171	8		\$ 503,045
Instructional Personnel															
Core Content Teacher(s)	20	\$ 50,000	\$ 1,000,000	25	\$ 51,500	\$ 1,287,500	30	\$ 53,045	\$ 1,591,350	35	\$ 54,636	\$ 1,912,260	40	\$ 56,275	\$ 2,251,000
Electives/Specialty Teacher(s)	2	\$ 50,000	\$ 100,000	2	\$ 51,500	\$ 103,000	2	\$ 53,045	\$ 106,090	2	\$ 54,636	\$ 109,272	2	\$ 56,275	\$ 112,550
Exceptional Children Teacher(s)	2	\$ 50,000	\$ 100,000	3	\$ 51,500	\$ 154,500	3	\$ 53,045	\$ 159,135	4	\$ 54,636	\$ 218,544	4	\$ 56,275	\$ 225,100
Instructional Support		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Teacher Assistants	16	\$ 30,000	\$ 480,000	17	\$ 30,900	\$ 525,300	17	\$ 31,827	\$ 541,059	17	\$ 32,781	\$ 557,277	17	\$ 33,765	\$ 574,005
tutor	1	\$ 15,000	\$ 15,000	1	\$ 20,000	\$ 20,000	1	\$ 25,000	\$ 25,000	1	\$ 30,000	\$ 30,000	1	\$ 32,500	\$ 32,500
substitute	1	\$ 15,000	\$ 15,000	1	\$ 30,000	\$ 30,000	1	\$ 40,000	\$ 40,000	1	\$ 50,000	\$ 50,000	1	\$ 50,000	\$ 50,000
*** Edit text as needed. ***		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
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*** Edit text as needed. ***		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Total Instructional Personnel:	42		\$ 1,710,000	49		\$ 2,120,300	54		\$ 2,462,634	60		\$ 2,877,353	65		\$ 3,245,155
Total Admin, Support and Instructional Personnel:	48		\$ 2,046,000	55		\$ 2,466,100	61		\$ 2,883,618	68		\$ 3,365,524.00	73		\$ 3,748,200

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
Administrative & Support Benefits															
Health Insurance	6	\$ 7,108	\$ 42,648	6	\$ 7,463	\$ 44,778	7	\$ 7,836	\$ 54,852	8	\$ 8,228	\$ 65,824	8	\$ 8,639	\$ 69,112
Retirement Plan--NC State			\$ -			\$ -			\$ -			\$ -			\$ -
Retirement Plan--Other	6	\$ 1,656	\$ 9,936	6	\$ 1,705	\$ 10,230	7	\$ 1,756	\$ 12,292	8	\$ 1,808	\$ 14,464	8	\$ 1,862	\$ 14,896
Life Insurance			\$ -			\$ -			\$ -			\$ -			\$ -
Disability			\$ -			\$ -			\$ -			\$ -			\$ -
Medicare	6	\$ 773	\$ 4,637	6	\$ 795	\$ 4,770	7	\$ 833	\$ 5,831	8	\$ 844	\$ 6,752	8	\$ 869	\$ 6,952
Social Security	6	\$ 3,422	\$ 20,534	6	\$ 3,524	\$ 21,144	7	\$ 3,630	\$ 25,410	8	\$ 3,739	\$ 29,912	8	\$ 3,851	\$ 30,808
Dental	6	\$ 383	\$ 2,296	6	\$ 401	\$ 2,406	7	\$ 421	\$ 2,947	8	\$ 442	\$ 3,536	8	\$ 465	\$ 3,720
*** Edit text as needed. ***			\$ -			\$ -			\$ -			\$ -			\$ -
*** Edit text as needed. ***			\$ -			\$ -			\$ -			\$ -			\$ -
*** Edit text as needed. ***			\$ -			\$ -			\$ -			\$ -			\$ -
Total Admin and Support Benefits:			\$ 80,051			\$ 83,328			\$ 101,332			\$ 120,488			\$ 125,488
Instructional Personnel Benefits															
Health Insurance	40	\$ 7,108	\$ 284,320	47	\$ 7,463	\$ 350,761	52	\$ 7,836	\$ 407,472	58	\$ 8,228	\$ 477,224	63	\$ 8,639	\$ 544,257
Retirement Plan--NC State			\$ -			\$ -			\$ -			\$ -			\$ -
Retirement Plan--Other	40	\$ 1,452	\$ 58,080	47	\$ 1,495	\$ 70,265	52	\$ 1,540	\$ 80,080	58	\$ 1,586	\$ 91,988	63	\$ 1,634	\$ 102,942
Social Security	42	\$ 2,524	\$ 106,020	49	\$ 2,623	\$ 128,527	54	\$ 2,779	\$ 150,066	60	\$ 2,935	\$ 176,100	65	\$ 3,062	\$ 199,030
Disability			\$ -			\$ -			\$ -			\$ -			\$ -
Medicare	42	\$ 570	\$ 23,940	49	\$ 592	\$ 29,008	54	\$ 627	\$ 33,858	60	\$ 662	\$ 39,720	65	\$ 691	\$ 44,915
Life Insurance			\$ -			\$ -			\$ -			\$ -			\$ -
Dental	40	\$ 383	\$ 15,304	47	\$ 401	\$ 18,847	52	\$ 421	\$ 21,892	58	\$ 442	\$ 25,636	63	\$ 465	\$ 29,295
*** Edit text as needed. ***			\$ -			\$ -			\$ -			\$ -			\$ -
*** Edit text as needed. ***			\$ -			\$ -			\$ -			\$ -			\$ -
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*** Edit text as needed. ***			\$ -			\$ -			\$ -			\$ -			\$ -
Total Instructional Personnel Benefits:			\$ 487,665			\$ 597,408			\$ 693,368			\$ 810,668			\$ 920,439
Total Personnel Benefits:			\$ 567,715			\$ 680,736			\$ 794,700			\$ 931,156			\$ 1,045,927
Total Admin & Support Personnel (Salary & Benefits):	6		\$ 416,051	6		\$ 429,128	7		\$ 522,316	8		\$ 608,659.00	8		\$ 628,533
Total Instructional Personnel (Salary & Benefits):	42		\$ 2,197,665	49		\$ 2,717,708	54		\$ 3,156,002	60		\$ 3,688,021	65		\$ 4,165,594
TOTAL PERSONNEL:	48		\$ 2,613,715	55		\$ 3,146,836	61		\$ 3,678,318	68		\$ 4,296,680	73		\$ 4,794,127

*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
Office			
Office Supplies	\$ 5,000.00	\$ 10,000.00	\$ 15,000.00
Paper (in copier row 11)			
Computers & Software	\$ 10,000.00	\$ 7,500.00	\$ 7,500.00
Communications & Telephone	\$ 10,000.00	\$ 12,000.00	\$ 15,000.00
Copier - total	\$ 6,000.00	\$ 12,000.00	\$ 18,000.00
Health Supplies	\$ 1,000.00	\$ 1,500.00	\$ 2,000.00
postage and Shipping	\$ 2,000.00	\$ 3,000.00	\$ 4,000.00
Sales Tax Expense	\$ 15,000.00	\$ 20,000.00	\$ 25,000.00
Membership Fees and Dues	\$ 5,000.00	\$ 10,000.00	\$ 10,000.00
Management Company			
Contract Fees			
Other			
*** Insert rows and edit text as needed. ***			
Professional Contract			
Legal Counsel	\$ 2,500.00	\$ 2,500.00	\$ 10,000.00
Student Accounting	\$ 16,000.00	\$ 20,000.00	\$ 24,000.00
Financial	\$ 40,000.00	\$ 50,000.00	\$ 60,000.00
Audit	\$ -	\$ 10,000.00	\$ 15,000.00
Technology Services	\$ 40,000.00	\$ 50,000.00	\$ 60,000.00
Other- HR, G&A Bank Fees	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00
Facilities			
Facility Lease/Mortgage	\$ 400,000.00	\$ 500,000.00	\$ 1,200,000.00
Maintenance	\$ 35,000.00	\$ 35,000.00	\$ 59,000.00
Custodial Supplies	\$ 20,000.00	\$ 20,000.00	\$ 35,000.00
Custodial Contract	\$ 57,701.00	\$ 57,701.00	\$ 115,000.00
Insurance (pg19)	\$ 23,778.00	\$ 26,155.00	\$ 28,771.00
Landscaping	\$ 15,000.00	\$ 15,000.00	\$ 30,000.00
Security Monitoring	\$ 6,731.00	\$ 6,731.00	\$ 15,000.00
Cap Equipment Instructional	\$ 80,000.00	\$ 80,000.00	\$ 50,000.00
Utilities			
Electric	\$ 33,600.00	\$ 39,318.00	\$ 78,636.00
Gas			

Water/Sewer	\$ 19,200.00	\$ 19,200.00	\$ 38,400.00
Trash	\$ 7,200.00	\$ 7,200.00	\$ 14,400.00
Other			
Telephone	\$ 9,015.00	\$ 10,531.00	\$ 12,000.00
Transportation			
Buses - total (see Narrative)	\$ 100,000.00	\$ 125,000.00	\$ 150,000.00
Other			
Marketing	\$ 30,000.00	\$ 35,000.00	\$ 40,000.00
Child nutrition	\$ 60,000.00	\$ 75,000.00	\$ 85,000.00
Travel			
Other			
*** Insert rows and edit text as needed. ***			
Total Administrative & Support Operations:	\$ 1,065,725.00	\$ 1,276,336.00	\$ 2,232,707.00

OPERATIONS BUDGET:			
Instructional	Year 1	Year 2	Year 3
Classroom Technology			
Hardware and Software	\$ 140,000.00	\$ 85,000.00	\$ 90,000.00
Other			
*** Insert rows and edit text as needed. ***			
Instructional Contract			
Staff Development	\$ 10,000.00	\$ 15,000.00	\$ 20,000.00
EC Service	\$ 60,000.00	\$ 75,000.00	\$ 90,000.00
Psychological Services	\$ 10,000.00	\$ 15,000.00	\$ 20,000.00
Speech Services	\$ 40,000.00	\$ 50,000.00	\$ 60,000.00
Field Trips	\$ 15,000.00	\$ 25,000.00	\$ 30,000.00
Books and Supplies			
Instructional Materials	\$ 40,000.00	\$ 50,000.00	\$ 60,000.00
Curriculum/Texts			
Copy Paper			
Testing Supplies			
EC Supplies	\$ 6,000.00	\$ 7,500.00	\$ 9,000.00
*** Insert rows and edit text as needed. ***			
Total Instructional Operations:	\$ 321,000.00	\$ 322,500.00	\$ 379,000.00
TOTAL OPERATIONS:	\$ 1,386,725.00	\$ 1,598,836.00	\$ 2,611,707.00

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

Year 4	Year 5
\$ 20,000.00	\$ 25,000.00
\$ 7,500.00	\$ 7,500.00
\$ 15,000.00	\$ 15,000.00
\$ 20,000.00	\$ 22,000.00
\$ 2,500.00	\$ 3,000.00
\$ 4,500.00	\$ 5,000.00
\$ 30,000.00	\$ 35,000.00
\$ 12,000.00	\$ 12,000.00
\$ 10,000.00	\$ 10,000.00
\$ 28,000.00	\$ 32,000.00
\$ 70,000.00	\$ 80,000.00
\$ 20,000.00	\$ 25,000.00
\$ 70,000.00	\$ 80,000.00
\$ 16,000.00	\$ 16,000.00
\$ 1,200,000.00	\$ 1,200,000.00
\$ 59,000.00	\$ 59,000.00
\$ 35,000.00	\$ 35,000.00
\$ 115,000.00	\$ 115,000.00
\$ 31,648.00	\$ 34,813.00
\$ 30,000.00	\$ 30,000.00
\$ 17,000.00	\$ 17,500.00
\$ 50,000.00	\$ 50,000.00
\$ 78,636.00	\$ 78,636.00

\$	42,000.00	\$	42,000.00
\$	14,400.00	\$	14,400.00
\$	13,500.00	\$	15,000.00
\$	175,000.00	\$	200,000.00
\$	40,000.00	\$	40,000.00
\$	90,000.00	\$	100,000.00
\$	2,316,684.00	\$	2,398,849.00

Year 4		Year 5	
\$	95,000.00	\$	100,000.00
\$	25,000.00	\$	30,000.00
\$	105,000.00	\$	120,000.00
\$	25,000.00	\$	30,000.00
\$	70,000.00	\$	80,000.00
\$	35,000.00	\$	40,000.00
\$	70,000.00	\$	80,000.00
\$	10,500.00	\$	12,000.00
\$	435,500.00	\$	492,000.00

\$	2,752,184.00	\$	2,890,849.00
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Overall Budget

SUMMARY	Logic	Year 1	Year 2	Year 3	Year 4	Year 5
Total Personnel	J	\$ 2,613,715.44	\$ 3,146,836.00	\$ 3,678,318.00	\$ 4,296,680.00	\$ 4,794,127.00
Total Operations	M	\$ 1,386,725.00	\$ 1,598,836.00	\$ 2,611,707.00	\$ 2,752,184.00	\$ 2,890,849.00
Total Expenditures	N = J + M	\$ 4,000,440.44	\$ 4,745,672.00	\$ 6,290,025.00	\$ 7,048,864.00	\$ 7,684,976.00
Total Revenue	Z	\$ 4,629,587.20	\$ 5,847,558.00	\$ 7,035,241.80	\$ 8,207,782.10	\$ 9,380,322.40
Surplus / (Deficit)	= Z - N	\$ 629,146.76	\$ 1,101,886.00	\$ 745,216.80	\$ 1,158,918.10	\$ 1,695,346.40



April 21, 2023

Members of the Charter School Advisory Board and NC Department of Education,

I am writing to express my enthusiastic support for Carolina Achieve, the proposed new inclusive K-8 learner-centered and competency-based charter school in Orange County. As the CEO of the Hillsborough/Orange County Chamber of Commerce, I am deeply committed to supporting initiatives that enhance the educational opportunities and economic vitality of our community. I believe that this new school will do both.

The mission of this school is truly inspiring. By focusing on the development of entrepreneurial skills, mindsets, and behaviors called the Habits of Success, the school will prepare all students to achieve their scholastic, personal, and professional goals. I believe that this approach to education is essential for the success of our future workforce and that this specific focus is not offered at any other school in our county.

As you know, the business community in our region is constantly seeking skilled, knowledgeable, and motivated employees. By providing students with the tools they need to succeed in the workforce, this school will help to meet this demand and boost economic growth in our area. The Habits of Success that students will learn at this school are precisely the qualities that employers are seeking in their employees.

Furthermore, by fostering an inclusive learning environment that celebrates diversity, this school will prepare students to thrive in a global economy. The ability to work effectively with people from different backgrounds and cultures is increasingly important in the modern workforce, and this school will give students a head start in developing these critical skills.

In conclusion, I urge you to support Carolina Achieve, the proposed inclusive K-8 learner-centered and competency-based charter school in Orange County. I believe that this school has the potential to make a significant positive impact on our community by preparing our students for success in the workforce and boosting economic growth in the region. Thank you for your consideration.

Sincerely,

Scott Czechlewski
CEO, Hillsborough/Orange County Chamber of Commerce



NORTH CAROLINA

Department of the Secretary of State

To all whom these presents shall come, Greetings:

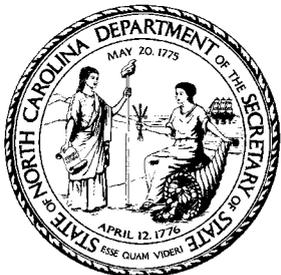
I, ELAINE F. MARSHALL, Secretary of State of the State of North Carolina, do hereby certify the following and hereto attached to be a true copy of

ARTICLES OF INCORPORATION

OF

DURHAM ASPIRE ACADEMY, INC.

the original of which was filed in this office on the 16th day of November, 2021.



Scan to verify online.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 16th day of November, 2021.

Elaine F. Marshall

Secretary of State

ARTICLES OF INCORPORATION
OF
DURHAM ASPIRE ACADEMY, INC.

Pursuant to Section 55A-2-02 of the North Carolina Nonprofit Corporation Act (the “Act”), the undersigned does hereby submit these Articles of Incorporation for the purposes of forming a nonprofit corporation.

1. The name of the corporation is Durham Aspire Academy, Inc. (hereinafter, the “*Corporation*”).
2. The period of duration of the Corporation is perpetual.
3. The purposes for which the Corporation is organized are exclusively charitable within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (the “*Code*”). The Corporation shall not conduct any activities not permitted to a corporation exempt from federal income tax under Section 501(c)(3) of the Code or to a corporation, contributions to which are deductible under Section 170(c)(2) of the Code.
4. No substantial part of the activities of the Corporation shall be propaganda or otherwise attempting to influence legislation. The Corporation shall not participate in or otherwise intervene in (including publication or distribution of statements) any political campaign on behalf of any candidate for public office.
5. No part of the net earnings of the Corporation shall inure to the benefit of or be distributable to its directors, officers, members or other private persons, except that the Corporation shall be authorized to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes of the Corporation. Upon dissolution of the Corporation, its assets shall, after all liabilities and obligations of the Corporation have been satisfied or after adequate provisions have been made therefor, be distributed to one or more organizations qualified under Section 501(c)(3) of the Code, as chosen by the Corporation’s Board of Directors.
6. The Corporation shall have no members.
7. The Corporation shall indemnify its officers and directors to the maximum extent required or permitted by Article 8, Part 5, of the Act, as from time to time amended. 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 an officer or director of the Corporation with respect to any matter which occurred, or any cause of action, suit or claim which accrued or arose prior to such amendment, appeal or adoption.

8. The street address and mailing address of the Corporation's initial registered office is 20 Rountree Lane, Bahama, Durham County, North Carolina 27503, and the name of the initial registered agent is John Oxaal.
9. The street address and the mailing address of the principal office of the Corporation are the same as the addresses for the initial registered office.
10. The initial director of the Corporation is John Oxaal. He is authorized, without limitation, to appoint additional directors.
11. The name and address of the incorporator is Larry E. Robbins, 4101 Lake Boone Trail, Suite 300, Raleigh, Wake County, North Carolina 27607.
12. These Articles will be effective upon filing.

This the 12th day of November 2021.

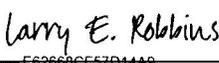
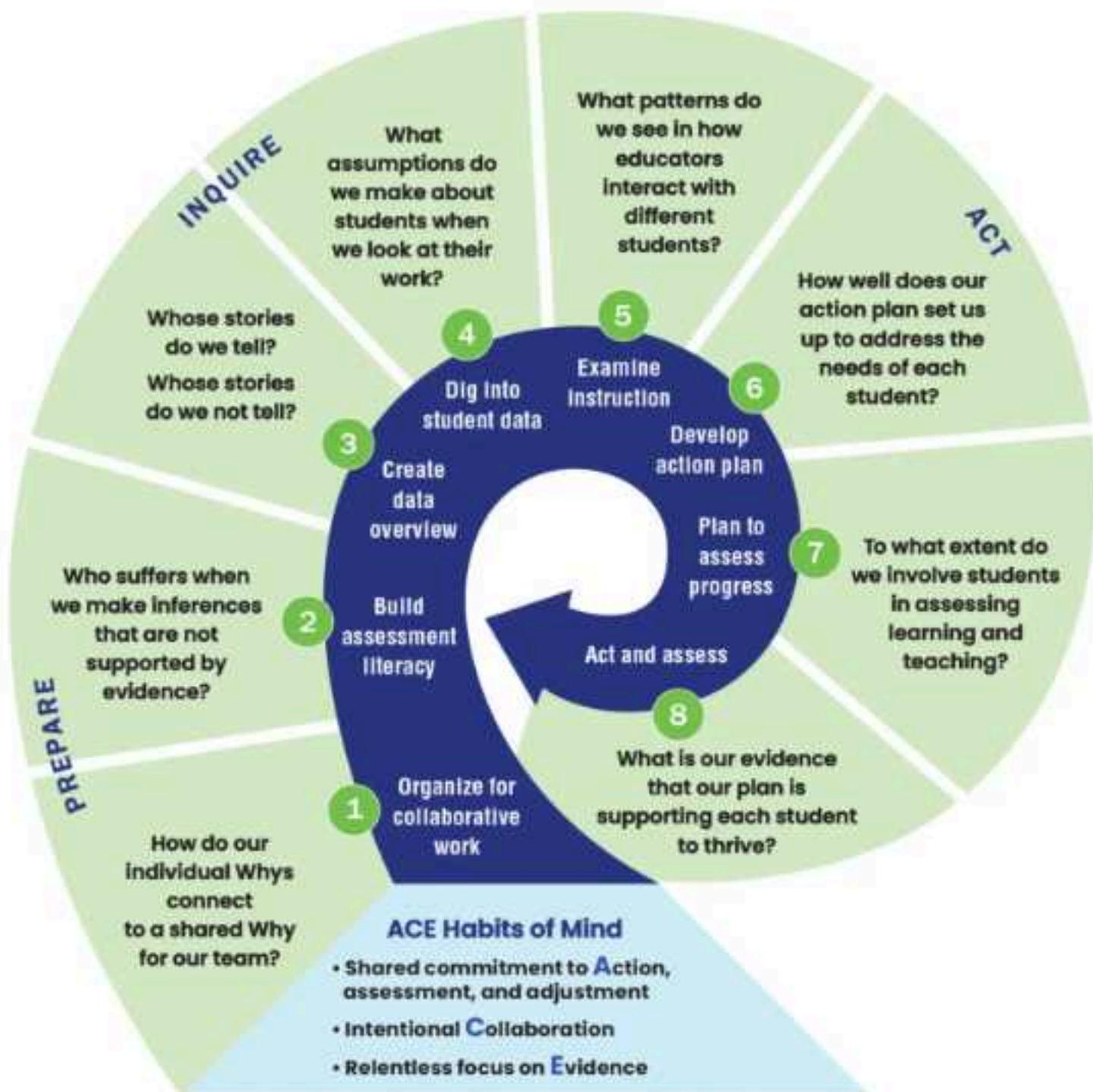
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E62668CF57D14A9...
Larry E. Robbins, Incorporator

FIGURE 1. Taking an Equity Lens in Data Wise



© Data Wise Project 2021

Adapted with permission from Boudett, K. P., City, E. A., & Murnane, R. J. (Eds.) (2013). *Data Wise: A Step-by-Step Guide to Using Assessment Results to Improve Learning and Teaching, Revised and Expanded Edition*. Cambridge, MA: Harvard Education Press, p. 5.

What Is Differentiated Instruction and Why Differentiate?

Most young children in their first year of school can look around their classrooms and easily point out who can already read well; who can draw neatly inside the lines; who struggles with counting; and who likes to find the most yucky, yet fascinating, bugs. Throughout their school education, students also remain aware of their own differences related to learning readiness, interests, and learning profiles.

Educators have been intrigued and challenged by this diversity but have not always adequately responded to student varied needs. Instead, we tend to rely on the teach-to-the-middle or one-size-fits-all approach, expecting all students to do the same activity, work at the same pace, do the same homework, and take the same test.

Typically, the result is frustration on the part of many students—those who find the work unchallenging and therefore boring, those who find the work too challenging, and those whose learning styles or strengths are not engaged. And there is frustration on the part of teachers because they are not reaching every student. So, in their search to create genuinely challenging and engaging learning experiences for their students, many teachers have discovered that they can better meet the diverse needs of their students by differentiating instruction.

What Is Differentiated Instruction?

In the video *Creating Multiple Paths for Learning* (1997), Carol Ann Tomlinson, noted differentiation expert, says that differentiating instruction means that the teacher anticipates the differences in students' readiness, interests, and learning profiles and, as a result, creates different learning paths so that students have the opportunity to learn as much as they can as deeply as they can, without undue anxiety because the assignments are too taxing—or boredom because they are not challenging enough.

She cautions, however, that differentiated instruction is not individualized instruction. Students may have two or three learning options some days, but never 21 or 35 different options.

“Differentiation can be accurately described as classroom practice with a balanced emphasis on individual students and course content,” write Carol Ann Tomlinson and Marcia B. Imbeau in their book *Leading and Managing a Differentiated Classroom* (2010). The need for the balanced emphasis is evident through the diversity students bring to the classroom: “Students differ as learners in terms of background experience, culture, language, gender, interests, readiness to learn, modes of learning, speed of learning, support systems for learning, self-awareness as a learner, confidence as a learner, independence as a learner, and a host of other ways” (p. 13). Most important, these differences will “profoundly affect how students learn and the nature of scaffolding they will need at various points in the learning process.”

Differentiated instruction is a way of thinking about teaching and learning. It is also a model that guides instructional planning in response to students' needs.

Essentially, the aim of differentiating instruction is to maximize the growth of all students by meeting them where they are. To do so, Tomlinson and Imbeau (2010) suggest that teachers continually ask, “What does this student need at this moment in order to be able to progress with this key content, and what do I need to do to make that happen?” (p. 13).

Key Characteristics of Differentiated Instruction

Differentiation can look very different in various classrooms because teachers use numerous strategies and tools to differentiate instruction. Regardless of the specific combination of techniques, however, effectively differentiated classrooms share

several key characteristics. These characteristics are described in *How to Differentiate in Mixed-Ability Classrooms* by Carol Ann Tomlinson (2001) and are summarized in the table below:

Characteristic	Example or Explanation
Differentiated instruction is proactive .	The teacher proactively plans differentiation to address a variety of learning needs—as opposed to adjusting a lesson plan when it becomes clear that it’s not working for some students.
Differentiated instruction is more qualitative than quantitative .	DI involves adjusting the quality of an assignment to match student needs —not varying the quantity of work. For example, a struggling reader may need additional support for reading and writing a book report. An advanced student who has mastered one math skill, instead of doing more assignments that are too easy for him, can practice another skill.
Differentiated instruction is rooted in assessment .	Since addressing student individual needs is at the core of DI, teachers look for every opportunity to get to know their students better —through conversations with students, classroom discussions, student work, observation, and formal assessment. Then, teachers design and modify learning experiences based on assessment findings . Each student’s progress is measured, at least in part, from where that student begins.
Differentiated instruction provides multiple approaches to content, process, product, and affect/learning environment .	At the core of DI is the modification of four elements— content (what students learn), process (how do students make sense of the information and ideas), product (how they show what they’ve learned) and affect/learning environment (the climate or tone in the classroom). This modification is based on assessment of student differences in readiness, interest, and learning profile .
Differentiated instruction is student centered .	All students participate in respectful work —work that is challenging, meaningful, interesting, and engaging. Tasks are based on students’ prior knowledge and are designed with the level of challenge appropriate for the student. The teacher primarily coordinates time, space, and activities , rather than provides information. Pacing varies based on students’ needs. The goal is to help students become self-reliant learners and to share the responsibility for their learning.

Characteristic	Example or Explanation
Differentiated instruction is a blend of whole-class, group, and individual instruction.	The teacher uses a variety of instructional strategies to help target instruction to students' needs. Students work in a variety of group configurations, as well as independently. Flexible grouping is evident.
Differentiated instruction is "organic."	Teaching constantly evolves through collaboration between students and teachers , which includes setting class and individual goals. Teachers monitor how learning fits the student and make adjustments, where necessary.

Addressing Common Misunderstandings About Differentiation

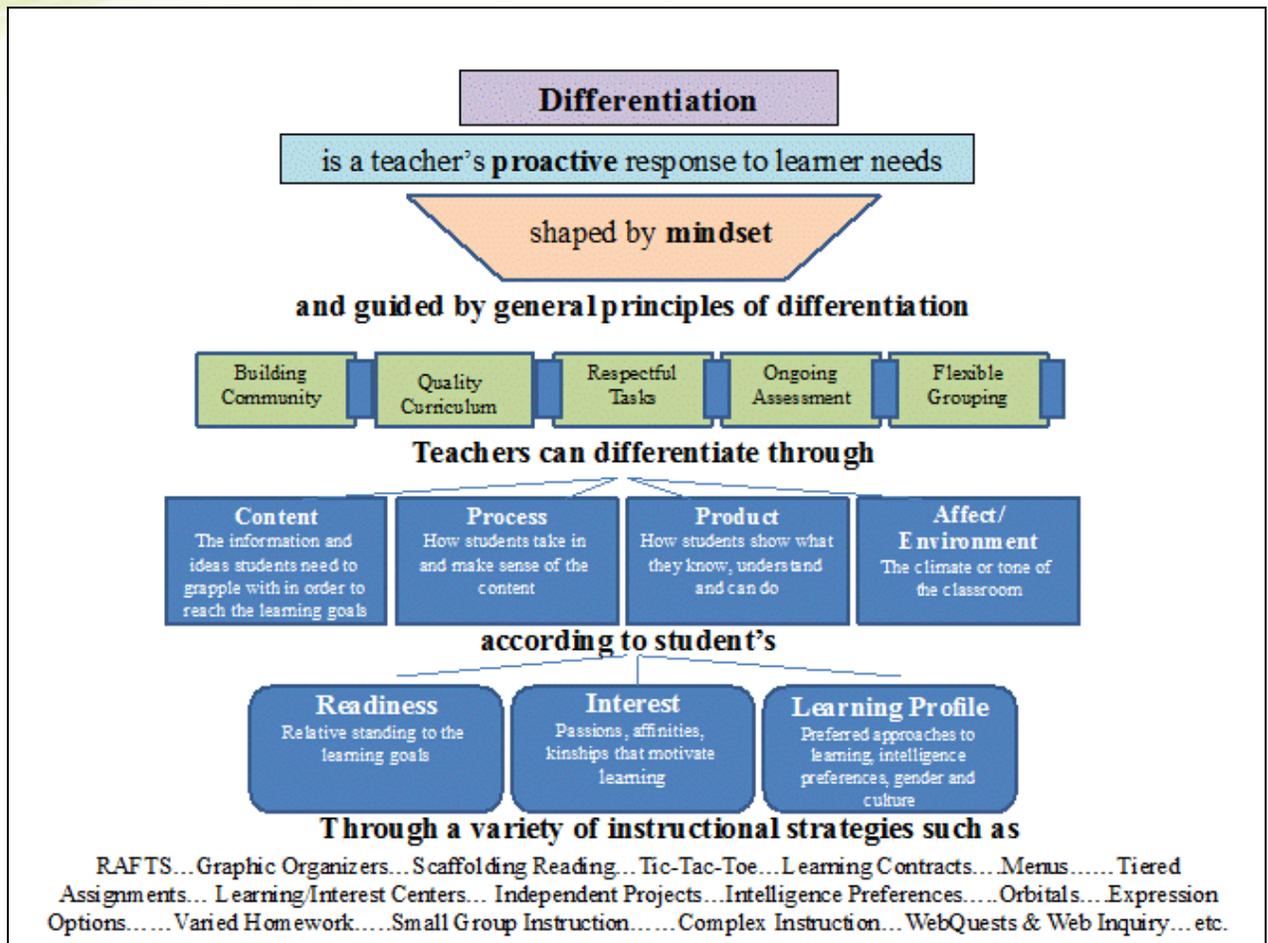
Most teachers instinctively understand the need for differentiation. Mounting evidence also indicates that consistent, high-quality use of the differentiation model increases student motivation, satisfaction, and achievement. Still, there are some misunderstandings about what differentiation is and isn't. Carol Ann Tomlinson and Marcia Imbeau present these in *Leading and Managing a Differentiated Classroom* (2010):

Misunderstanding	Reality
Differentiation is a set of instructional strategies.	Differentiation is a philosophy—a way of thinking about teaching and learning. It is, in fact, a set of principles.
It's adequate for a district or school leader (or professional developers) to tell or show teachers how to differentiate instruction effectively.	Effective differentiation requires rethinking one's classroom practice and outcomes through ongoing trial, reflection, and adjustment in the classroom itself.
Differentiation is something a teacher does or doesn't do (as in, "I already do that," or "I tell our teachers that they already differentiate instruction.")	Most experienced teachers <i>do</i> pay attention to student variation and respond to it in some way—especially with students who can disrupt the classroom. However, few teachers proactively plan instruction to consistently address student differences.

Misunderstanding	Reality
Differentiation is just about instruction.	Although differentiation is an instructional approach that responds to student differences, effective differentiated instruction is inseparable from a welcoming, supportive, and challenging learning environment; high-quality curriculum; ongoing assessment that informs the teacher's decision making; and leadership and flexible classroom management. These elements are interrelated. If any one of those elements is weak, the others are also diminished.

Source: Tomlinson & Imbeau, 2010, p. 13.

Remember: Differentiated instruction is a way of thinking about teaching and learning. It is also a model that guides instructional planning in response to students' needs. This comprehensive model is illustrated through the concept map display on the next page. We will explore this model through the remaining modules.



Created by Carol Ann Tomlinson. Reprinted with permission.

ELA.1 Read Critically

[back to overview](#)

I can read and critique diverse texts (e.g., books, films, advertising, music, social media, news websites).

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.1.1</p> <p>Choose and apply reading strategies</p>	<p>I can point to text features (e.g., title, illustrations, cover, headings, trailer, landing page) and start to make connections to the story or source, and wonder about what will happen or what I will learn.</p> <p>When reading, I can picture what's happening in my mind.</p> <p>If I get stuck, I can use a strategy to get unstuck (e.g., look at the picture)</p>	<p>I can use text features to make connections and pose questions that help me get ready to read/watch.</p> <p>When I read, I can use strategies (e.g., questioning, inferring, connecting, predicting, visualizing) to make meaning of the story/source.</p> <p>If I get stuck, I can use one or more strategies to get unstuck (e.g., reread, use pictures/headings to help, words before/after).</p>	<p>When I read, I can use strategies (e.g., questioning, inferring, connecting, predicting, visualizing) to make meaning of the story/source.</p> <p>I can explain (e.g., discussion, journal, conference) how a specific strategy helped me to better understand the story/source.</p>	<p>As I read middle school level texts (e.g., 925L-1185L), I can use strategies (e.g., questioning, inferring, connecting, predicting, visualizing) to make meaning of the story/source.</p> <p>I can explain (e.g., discussion, journal, conference) how and when I used specific strategies to help me better understand the story/source.</p>	<p>As I read high school level texts (e.g., 1040L-1385L), I can use a variety of strategies to make meaning of the story/source.</p> <p>I can analyze (e.g., discussion, journal, conference) my use of strategies (e.g., how I use them, which ones help me and when) to better understand myself as a reader and to gain a deeper understanding of the story/source I am reading.</p>	<p>As I read college level texts (e.g., 1185L-1440L), I can use a variety of strategies to make meaning of the story/source.</p> <p>I can evaluate (e.g., discussion, journal, conference) my use of strategies (e.g., how I use them, which ones help me and when) to better understand myself as a reader and to gain a deeper understanding of the story/source I am reading.</p>
<p>ELA.1.2</p> <p>Evaluate the main ideas or themes</p>	<p>I can give a summary of the story/source.</p> <p>I can share my opinion about the main idea/topic/theme, and talk about how it connects to my own ideas and experiences.</p>	<p>I can use details to give a summary of the story/source.</p> <p>I can share my opinion about the main idea/claim/theme, and discuss how it connects to my own ideas and experiences, other sources I've read, or issues/events in the world.</p>	<p>I can use important details to summarize the story/source as I describe the main idea/claim/theme.</p> <p>I can share my opinion about the main idea/claim/theme, and the values it reflects.</p> <p>I can discuss how it connects to my own ideas and experiences, other sources I've read, or issues/events in the world.</p> <p>I can use details to talk about how well the main idea/claim/theme was developed through the content/plot/characters presented in the story/source.</p>	<p>I can cite the most relevant and important evidence to summarize the story/source and explain the main idea/claim/theme.</p> <p>I can take a position about the main idea/claim/theme and analyze its underlying values/beliefs/theories.</p> <p>I can draw on textual evidence, as well as personal experience or historical or contemporary issues/events to defend my position.</p> <p>I can use evidence to analyze how well the main idea/claim/theme was developed through the content/plot/characters.</p>	<p>I can cite the most relevant or important evidence to present the main ideas/claims/themes of a story/source while succinctly summarizing how they were developed.</p> <p>I can critique the main idea/claim/theme, its underlying values/beliefs/theories, and its potential or actual influence on society.</p> <p>I can draw on textual evidence to make connections to contemporary issues, historical events, and/or institutional structures (e.g., political, religious, cultural, racial) to defend my critique.</p> <p>I can use evidence to analyze how well the main idea/claim/theme was developed through the content/plot/characters.</p>	<p>I can cite the most relevant or important evidence to present the main ideas/claims/themes of a story/source while succinctly summarizing how they were developed.</p> <p>I can critique the main idea/claim/theme, its underlying values/beliefs/paradigms, its potential or actual influence on society, and its relationship to other positions/experts/sources in the same field.</p> <p>I can draw on textual evidence to discuss issues of power within and beyond the text, making connections to contemporary issues, historical events, and/or institutional structures (e.g., political, religious, cultural, racial).</p> <p>I can critique how well developments engage readers and compel readers to espouse a particular way of thinking.</p>

<p>ELA.1.3</p> <p>Analyze context, point of view, and purpose</p>	<p>I can share my ideas about why the author created this story/source (e.g., persuade, inform, entertain).</p> <p>In stories, I can talk about reasons why the main character does or says things like I do (or unlike I do).</p>	<p>I describe what the author is trying to get me to think/feel, and I can think critically about whether I agree or disagree.</p> <p>I can use details from the text to talk about ways that I do/don't identify with the author or main character(s).</p> <p>I can discuss whose perspective is missing and possible reasons why.</p>	<p>I can figure out which values, beliefs, or ideas the author is trying to get me to agree with, and I can think critically about whether I agree or disagree.</p> <p>I can contrast the author or main characters' point of view with other points of view presented in or excluded by the source.</p> <p>I can discuss how different audiences may experience this story/source differently from me and why (e.g., social identity markers, such as race, religion, language, gender, class).</p>	<p>I can draw from textual evidence to analyze which values, beliefs, or ideas the author is trying to get me to agree with, evaluating sources for credibility (when applicable).</p> <p>I can contrast the author or main characters' point of view with other points of view or information presented, excluded, or misrepresented by the source.</p> <p>I can recognize examples of bias in the author's presentation of information, and assess the reliability of the author as a source of information.</p> <p>I can discuss how different audiences may experience this story/source differently from me and why.</p>	<p>I can draw from textual evidence to critique the values, beliefs, or ideas promoted by the author, evaluating sources for credibility (when applicable).</p> <p>I can contrast the author or main characters' point of view with other points of view or information presented, excluded, or misrepresented by the source, and discuss the impact on the reader's perspective.</p> <p>I can analyze examples of bias in the author's presentation of information, and assess the reliability and credibility of the author as a source of information.</p> <p>I can discuss how different audiences may experience this story/source differently and why.</p> <p>I can make connections between author's purpose and the historical or contemporary context of the source.</p>	<p>I can draw from textual evidence to critique the values, beliefs, or ideas promoted by the author, evaluating sources for credibility (when applicable).</p> <p>I can contrast the author or main characters' point of view, and discuss the author's intent related to inclusion of different or conflicting information or points of view, and discuss the impact on the reader's perspective.</p> <p>I can analyze examples of bias in the author's presentation of information as well as other sources by or about this author, and argue for or against the reliability and credibility of the author as a source of information.</p> <p>I can draw on parts of the story/source and the whole to discuss how different audiences may experience this story/source differently and why.</p> <p>I can analyze the relationship between the source and the historical or contemporary context in which it was created.</p>
<p>ELA.1.4</p> <p>Analyze craft</p>	<p>I can look for ways the author/creator made something from the story/source stand out (e.g., bold text, something within a picture).</p> <p>I can talk about why I think they did that, and if it helped me or not.</p>	<p>I can talk about how certain words, phrases, images or sounds from the source stood out to me and had me thinking in a certain way.</p> <p>I can talk about how the text structure (e.g., problem-solution, cause and effect, time sequence) helped with my understanding.</p>	<p>I can use examples to analyze specific techniques (e.g., words and phrases, soundtrack, lighting) used by the author to focus my attention and/or make me think or feel a certain way.</p> <p>I can analyze the effectiveness of the organizing structure in achieving its purpose.</p>	<p>I can use examples to evaluate the most impactful techniques (e.g., rhetorical devices) used by the author to focus my attention, influence the way I think or feel, and advance a certain point of view.</p> <p>I can discuss how well specific techniques aligned to purpose.</p>	<p>I can use examples to evaluate the most impactful techniques (e.g., rhetorical devices) used by the author to focus my attention, influence the way I think or feel, and advance a certain point of view.</p> <p>I can discuss how well specific techniques aligned to purpose, and how different choices could have resulted in greater impact.</p>	<p>I can critique the author's use of a variety of techniques to focus the audience's attention, develop a point of view, and advance her/his purpose.</p> <p>I can evaluate the effectiveness of the techniques employed, and how they contribute to the power, persuasiveness, or beauty of the source.</p>

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[Lead Author: Sydney Schaefer for reDesign](#)

[Contributing Author: Sandra Moutoutjis for Building 21](#)

Sources: [English Language Arts Common Core State Standards](#)
[College and Career Readiness: Through the Lens of Lexiles](#)
[Understanding Text Complexity and Lexiles](#)

Feedback: [Use this form to submit feedback/corrections for these continua.](#)

Last edited: 2021-09-30

ELA.2 Express Ideas

[back to overview](#)

I can clearly and effectively express my ideas (in written and oral form) for particular purposes and audiences, using diverse formats and settings to inform, persuade, and connect with others.

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.2.1</p> <p>Identify a core message and audience</p>	<p>I can choose the main thing I want to say to my audience.</p>	<p>I can choose a central message for my product/performance.</p> <p>I can determine my audience and purpose.</p>	<p>I can choose a central message (e.g., thesis, claim, story) for my product/performance.</p> <p>I have specific ideas for tailoring my approach for my audience and purpose.</p>	<p>Drawing on diverse sources, I can develop a central message for my product/performance that connects to an important theme, idea, or issue in the world.</p> <p>I have specific ideas for tailoring my approach for my audience and purpose.</p>	<p>Drawing on diverse sources, I can develop a central message for my product/performance that connects to an important theme, idea, or issue in the world.</p> <p>I can articulate the impact I hope to have on my audience.</p> <p>I have specific ideas and strategies for tailoring my approach for my audience and purpose, and for achieving impact.</p>	<p>Drawing on diverse sources and original insight, I can develop a central message that connects to an important theme, idea, or issue in the world and that contributes to, or advances, the field or discipline.</p> <p>I can anticipate the impact these ideas will have on different audiences and/or my community, and craft my message in a responsible way.</p> <p>I have specific ideas and strategies for tailoring my approach for my audience and purpose, and for achieving impact.</p>
<p>ELA.2.2</p> <p>Develop and organize the message</p>	<p>I can choose the details I want to share.</p> <p>I can put the details in the order that makes sense.</p> <p>I can create an opening.</p> <p>I can create a closing.</p>	<p>I can choose details and information that will help me achieve my purpose (e.g., inform, persuade, entertain).</p> <p>I can organize my ideas in a way that is easy for my audience to follow.</p> <p>I can choose an opening that gets my audience's attention.</p> <p>I can create a closing that achieves my purpose (e.g., inform, persuade, entertain).</p> <p>I can use words and examples that are relatable to my audience.</p>	<p>I can choose important details and/or evidence (e.g., claims, characters, plot, examples, reasons, rationale, actions) to develop my ideas in support of my purpose (e.g., inform, persuade, entertain).</p> <p>I can organize my ideas in a logical way.</p> <p>I can choose an opening that engages my audience (e.g., hook, setting a purpose, providing background, graphics or images, establishing a problem frame, using data)</p> <p>I can create a closing that achieves my purpose and highlights the importance of my topic (e.g. suggest a course of action, propose a solution, discuss a broader implication).</p> <p>I can apply tools, techniques and elements of craft (e.g., word choice, phrasing, pictures, sound effects, tone, rhetorical devices) to help engage my audience and connect with my message.</p>	<p>I can choose the most relevant and important details, descriptions, and/or evidence to develop my ideas (e.g., claims, characters, plot, examples, reasons, rationale, actions) in support of my purpose, addressing conflicting or alternative ideas or perspectives (when applicable).</p> <p>I can organize my ideas and supporting content around a logical structure/arc to achieve my purpose.</p> <p>I can choose an opening that engages my audience (e.g., hook, setting a purpose, providing background, graphics or images, establishing a problem frame, using data)</p> <p>I can create a closing that achieves my purpose (e.g. resolution, conclusion, suggest a course of action, propose a solution, discuss a broader implication, invitation to engage further, raising questions for future inquiry).</p> <p>I can apply tools, techniques and elements of craft (e.g., word choice, phrasing, pictures, sound effects, tone, rhetorical devices) to help engage my audience and effectively communicate my message.</p>	<p>I can choose the most relevant and important details, descriptions, and/or evidence to add depth or complexity to my ideas in support of my purpose (addressing conflicting or alternative ideas or perspectives when applicable).</p> <p>I can use the most effective structure to organize my ideas and supporting content around a logical structure/arc to achieve my purpose.</p> <p>I can choose an opening that engage and sets an intentional tone for my audience (e.g., hook, setting a purpose, providing background, graphics or images, establishing a problem frame, using data).</p> <p>I can create a closing that achieves my purpose (e.g. resolution, conclusion, suggest a course of action, propose a solution, discuss a broader implication, invitation to engage further, raising questions for future inquiry).</p> <p>I can apply tools, techniques and elements of craft (e.g., word choice, phrasing, pictures, sound effects, tone, rhetorical devices) to help engage my audience and effectively communicate my message.</p>	<p>I can explore a variety of diverse sources so I can choose the most relevant and important details and/or evidence from to add depth or complexity to my ideas in support of my purpose (addressing conflicting or alternative ideas or perspectives when applicable).</p> <p>I can use the most effective structure to organize my ideas and supporting content around a logical structure/arc to achieve my purpose.</p> <p>I can select from a variety of techniques and genres to create a compelling or provocative opening and set an intentional tone for my audience.</p> <p>I can create a closing that achieves my purpose and leaves a lasting impression or makes an impact on the audience (e.g. resolution, conclusion, suggest a course of action, propose a solution, discuss a broader implication, invitation to engage further, raising questions for future inquiry).</p> <p>I can apply sophisticated tools, techniques and elements of author's/creator's craft (e.g., artistic pacing, complex reflection, engaging dialogue) that illustrate my creativity and command of the genre, and help amplify my message.</p>

ELA.2 Express Ideas

[back to overview](#)

I can clearly and effectively express my ideas (in written and oral form) for particular purposes and audiences, using diverse formats and settings to inform, persuade, and connect with others.

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.2.3</p> <p>Prepare the medium</p>	<p>With guidance, I can choose the best way to share my message with my audience (i.e., speaking, writing, showing).</p>	<p>I can choose the best format for reaching my audience (e.g., written story, presentation, video).</p> <p>I can learn from high-quality examples and get ideas for my own product/performance.</p>	<p>I can choose the most effective format for my specific purpose and audience.</p> <p>I can learn from high-quality examples and get ideas for specific aspects of my product/performance.</p> <p>I can make choices about the features of my product/performance (e.g., data, pictures, music, software tools) and use of technology that help strengthen my message for my specific audience.</p>	<p>I can choose the most effective format for my specific purpose and audience.</p> <p>Using criteria, I can learn from high-quality examples and get ideas for specific aspects of my product/performance.</p> <p>I can make choices about the features of my product/performance and use of technology that help me strengthen or elaborate my message and positively impact my specific audience.</p>	<p>I can choose the most effective format for my specific purpose and audience.</p> <p>On my own, I can use criteria to source and learn from high-quality examples and get ideas for my own product/performance.</p> <p>I can make choices about the features of my product/performance and use of technology that help me strengthen or elaborate my message and positively impact my specific audience.</p> <p>I can incorporate design decisions that show evidence of my original thinking.</p>	<p>I can choose the most effective formats to tailor my products/performances for different audiences and/or purposes.</p> <p>Using criteria I've created, I can source and learn from exemplars, draw inspiration, and analyze format choice relative to purpose and audience.</p> <p>I can make differentiated choices about the features of my products/performances and use of technology that help me strengthen or elaborate my message and positively impact my different audience/s.</p> <p>I can incorporate novel design decisions that exemplify, or challenge, convention.</p>
<p>ELA.2.4</p> <p>Finalize, practice and/or prepare</p>	<p>I can use feedback to improve my work.</p> <p>I can make sure I've used complete sentences and punctuation in my speaking or writing.</p>	<p>I can self-assess against criteria to identify areas for improvement.</p> <p>I can use feedback to improve my product/performance.</p> <p>I can edit my final product to ensure it meets the guidelines provided by my teacher.</p> <p>I can practice or rehearse my performance before I share (when applicable).</p>	<p>I can self-assess against criteria to identify areas for improvement.</p> <p>I can use feedback to improve my product/performance for my specific audience and purpose.</p> <p>I can edit my final product to ensure it follows conventions and standards for the chosen genre.</p> <p>I can practice or rehearse my performance, and make one or more adjustments to prepare for my performance (when applicable).</p>	<p>I can self-assess against criteria to identify areas for improvement.</p> <p>I can gather and selectively use feedback from others, to improve my product/performance for my specific audience and purpose.</p> <p>I can edit my final product to ensure it follows conventions and standards for the chosen genre.</p> <p>I can practice or rehearse my performance, and make adjustments to prepare for my performance and to ensure supporting materials or supplies are ready (when applicable).</p>	<p>I can solicit general as well as targeted feedback based on my self-assessment, and selectively integrate feedback to improve my product/performance for my specific audience and purpose.</p> <p>I can edit my final product to ensure it follows conventions and standards consistent with the professional world.</p> <p>I can participate in sufficient practice or rehearsal rounds to ensure a high quality performance, make adjustments to prepare for my performance, and ensure supporting technologies, supplies, and materials are ready (when applicable).</p>	<p>I can solicit general as well as targeted feedback from expert/s based on my self-assessment, and selectively integrate feedback to improve my product/performance for my specific audience and purpose.</p> <p>I can edit my final product to ensure it follows conventions and standards consistent with the professional world, or breaks from standard conventions for a specific purpose or effect.</p> <p>I can participate in sufficient practice or rehearsal rounds at the designated venue/location to ensure the highest quality performance, making adjustments to prepare for my performance and working with others to ensure supporting technologies, supplies, materials, and all other components of the performance are ready (when applicable).</p>

ELA.2 Express Ideas

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I can clearly and effectively express my ideas (in written and oral form) for particular purposes and audiences, using diverse formats and settings to inform, persuade, and connect with others.

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.2.5</p> <p>Engage, respond, and reflect</p>	<p>When asked, I can answer questions about the ideas I shared.</p> <p>I can talk about how well I think my audience liked what I shared.</p>	<p>When asked, I can answer questions about my product/performance and/or provide additional information to my audience.</p> <p>I can explain what I did well and what I would change the next time.</p>	<p>I can respond to a range of questions (e.g., clarify, elaborate, critique) about my product/performance, maintaining my composure.</p> <p>I can reflect on both my process and product to identify areas of strength and areas for improvement.</p>	<p>I can respond to a range of questions about my work, maintaining my composure and connection to the audience (e.g., phrasing, tone, eye contact, references).</p> <p>I can reflect on both my process and product to identify areas of strength and areas for improvement.</p> <p>I can reflect on the impact my work had on my audience.</p>	<p>With confidence and composure, I can respond to a range of questions about my work, choosing carefully selected words, examples, or resources to connect with my specific audience.</p> <p>I can evaluate both my process and product to identify areas of strength and areas for improvement.</p> <p>I can evaluate the impact my product had on my specific audience.</p>	<p>With confidence, integrity, and composure, I can respond to a range of questions about my work, choosing carefully selected words, examples, or resources to connect with my specific audience.</p> <p>I can evaluate both my process and product to identify areas of strength and areas for improvement.</p> <p>I can evaluate the impact my product had on my specific audience, including whether or not my final product impacted them in the way I intended, collecting and analyzing feedback from my audience when possible.</p>

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ELA.3 Compose Evidence-based Arguments

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I can compose evidence-based arguments to support claims in an analysis of substantive topics or texts using valid reasoning and relevant and sufficient evidence.

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.3.1</p> <p>Introduce my claim</p>	<p>I can compose a topic sentence that clearly introduces my opinion.</p>	<p>I can compose a topic sentence that clearly introduces my opinion or claim.</p> <p>I can provide some context or background information about my topic.</p>	<p>I can introduce an arguable claim.</p> <p>I can compose an engaging hook.</p> <p>I can provide necessary context or background information about my topic.</p>	<p>I can introduce an arguable claim.</p> <p>I can compose an engaging hook that relates to my topic.</p> <p>I can provide necessary context or background information that will help my reader understand my topic and my claim.</p> <p>I can preview my reasons in the order they will be discussed.</p>	<p>I can choose a topic that relates to an important issue facing my community or the world.</p> <p>I can introduce an arguable claim.</p> <p>I can select from a variety of techniques to compose a compelling hook that sets the stage for my argument.</p> <p>I can provide necessary context or background information that will help my reader understand my topic and my claim.</p> <p>I can preview my reasons in the order they will be discussed.</p>	<p>I can choose a topic that relates to an important issue or controversy with local or global significance.</p> <p>I can precisely introduce an arguable claim(s).</p> <p>I can select from a variety of techniques and genres to compose a compelling hook that sets the stage for my argument.</p> <p>I can distinguish my claim from alternate or opposing claims.</p> <p>I can integrate critical contextual and/or background information that helps convey the significance of the claim(s) to my audience.</p> <p>I can preview my reasons I will address in relation to my claim(s).</p>
<p>ELA.3.2</p> <p>Develop my claim and counterclaims</p>	<p>I can include reasons to support my opinion.</p>	<p>I can organize my ideas in a logical order in a format appropriate to the task (e.g., 5 paragraph essay, editorial, debate, speech).</p> <p>I can include several logical reasons to support my opinion or claim.</p>	<p>I can organize my ideas in a logical order in a format appropriate to the task (e.g., 5 paragraph essay, editorial, debate, speech).</p> <p>I can include several logical reasons that support my claim.</p> <p>I can support each reason with relevant evidence from credible sources.</p> <p>I can briefly mention one or more counterclaims.</p>	<p>I can organize my ideas in a logical order in a format appropriate to the task (e.g., 5 paragraph essay, editorial, debate, speech).</p> <p>I can include several logical reasons that directly support my claim.</p> <p>I can support each reason by citing two or more relevant and convincing pieces of evidence from credible sources.</p> <p>I can use evidence to refute or disprove the counterclaim.</p>	<p>I can compose a cohesive argument that follows a logical progression in the format that is most appropriate for the task (e.g., 5 paragraph essay, editorial, debate, speech).</p> <p>I can develop several logical reasons that directly support my claim, citing multiple pieces of relevant and convincing evidence from credible sources to support each reason.</p> <p>I can fairly and thoroughly develop and refute counterclaims.</p>	<p>I can compose a cohesive argument that follows a logical progression in the format that is most appropriate for the task.</p> <p>I can develop several logical reasons that directly support my claim, citing multiple pieces of relevant and convincing evidence from credible sources to support each reason.</p> <p>I can attend to the knowledge level, concerns, values, and/or possible biases of my audience throughout my argument.</p> <p>I can fairly and thoroughly develop and refute counterclaims, using evidence and logic to critique the strengths and limitations of the counterargument (e.g., reasons, sources, and/or supporting evidence).</p>

ELA.3 Compose Evidence-based Arguments

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I can compose evidence-based arguments to support claims in an analysis of substantive topics or texts using valid reasoning and relevant and sufficient evidence.

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.3.3</p> <p>Use transitions to connect my ideas</p>	<p>I can use transitions to make connections between my ideas (e.g. first, then, next, last).</p>	<p>I can use transitions to make connections between my main ideas and my supporting ideas (e.g. first, then, next, last).</p>	<p>I can use transitions to make connections between my main ideas (e.g. one reason, in the first place, next, finally).</p> <p>I can use words, phrases and clauses as transitions to make connections between my claim, reasons, and evidence (e.g. furthermore, in comparison, since, for the same reason, in other words, in fact, for instance, given that).</p>	<p>I can use transitions to help create a logical flow between my main ideas.</p> <p>I can use words, phrases and clauses as transitions to help the reader understand the relationships among my claim, reasons and evidence (e.g. according to, consequently, in addition, subsequently, with this in mind, as a result, it is important to note).</p>	<p>I can place transitions intentionally to create a logical flow between my main ideas and give the reader a sense of coherence.</p> <p>I can use original transitions to clarify the relationships between my claim and reasons, between reasons and evidence, and between my claim and counterclaims.</p> <p>I can use transition phrases to show how new evidence relates back to previous evidence (e.g. as stated earlier, in contrast to, similarly to, previously, equally important).</p>	<p>I can place transitions intentionally to create a logical flow between my main ideas and give the reader a sense of coherence.</p> <p>I can use original transitions and varied syntax to clarify the relationships between my claims and reasons, between my reasons and evidence, and between my claims and counterclaims.</p> <p>I can use transition phrases to show how new evidence relates back to previous evidence.</p> <p>I can use transition phrases to introduce alternate views on a topic or interpretations of a text (e.g. while it may be true that, nevertheless, there may be times when).</p>
<p>ELA.3.4</p> <p>Use a formal style, objective tone, and advanced vocabulary</p>	<p>I can use complete sentences with the proper punctuation at the end of each sentence (period, question mark or exclamation point).</p>	<p>I can use complete sentences and avoid most spelling and punctuation errors.</p> <p>I can avoid slang and contractions in my writing.</p>	<p>I can use complete sentences and avoid most spelling, grammar, and punctuation errors.</p> <p>I can use formal language and avoid using slang and contractions.</p> <p>I can cite one or more trustworthy sources to support my analysis, according to specific guidelines for the task (e.g., MLA formatting).</p>	<p>I can use complete sentences and avoid most spelling, grammar, and punctuation errors.</p> <p>I can use formal language and avoid using slang and contractions.</p> <p>I can keep my pronouns in the third person and not switch to first or second person, unless it serves a specific and important purpose in my writing, such as stating my claim or opinion.</p> <p>I can use different sentence structures to emphasize key points.</p> <p>I can cite one or more trustworthy sources to support my analysis, according to specific guidelines for the task (e.g., MLA formatting).</p>	<p>I can compose arguments free of most errors in grammar, usage, and mechanics.</p> <p>I can use formal language and avoid contractions, slang, and switches in person, unless it serves a specific and compelling purpose in my writing.</p> <p>I can use advanced words that are specific to my topic (e.g. "fracking" and "oil rigs").</p> <p>I can use different sentence structures for different purposes.</p> <p>I can cite one or more trustworthy sources to support my analysis, according to specific guidelines for the task (e.g., MLA formatting).</p>	<p>I can compose arguments free of most errors in grammar, usage, and mechanics.</p> <p>I can use formal language and avoid contractions, slang, and switches in person, unless it serves a specific and compelling purpose in my writing.</p> <p>I can consistently use an advanced vocabulary for my topic.</p> <p>I can use sentence structure, verb tense, and punctuation purposefully.</p> <p>I intentionally choose language to make the reader think and/or feel a certain way.</p> <p>I can cite one or more trustworthy sources to support my analysis, according to specific guidelines for the task (e.g., MLA formatting).</p>

ELA.3 Compose Evidence-based Arguments

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I can compose evidence-based arguments to support claims in an analysis of substantive topics or texts using valid reasoning and relevant and sufficient evidence.

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.3.5</p> <p>Provide a compelling conclusion</p>	I can compose a concluding statement that restates my opinion.	I can compose a conclusion that restates my opinion or claim and my reasons.	I can compose a conclusion that summarizes my claim, reasons and importance of my topic.	I can compose a conclusion that summarizes my claim and my reasons. I can reflect on the importance of my topic and suggest an action or response.	I can compose a conclusion that synthesizes my argument. I can reflect on the importance of my topic and propose a course of action, a solution to an issue, or a question for further study. My conclusion strengthens the coherence of my overall argument.	I can compose a conclusion that synthesizes my argument. I can reflect on the importance of my topic and propose a course of action, a solution to an issue, or questions for further study. I can raise additional questions and/or challenges related to the topic, and discuss broader implications of the issue. My conclusion strengthens the coherence of my overall argument, employing similar techniques used in the introduction to bring the reader "full circle."
<p>ELA.3.6</p> <p>Strengthen writing through revision</p>	I can proofread my writing to make sure it makes sense. I can work with my teacher to revise or edit my writing to make it better.	I can proofread my writing to make sure it makes sense and to fix mistakes I made (e.g. capital letters, punctuation, spelling). I can use feedback from my teacher to revise and edit my writing to make it better.	I can use criteria (e.g. continua, editing/proofreading checklist) to revise and edit my writing. I can revise, edit, or rewrite parts of my writing after receiving feedback from my teacher.	I can use criteria (e.g. continua, editing/proofreading checklist) to revise and edit my writing. I can revise, edit, rewrite, or try a new approach to my writing using others' feedback (e.g. teacher, peer).	I can use criteria (e.g. continua, editing/proofreading checklist) to revise and edit my writing. I can ask for specific feedback throughout the writing process. I can revise, edit, rewrite, or try a new approach to my writing using others' feedback. I can identify the purpose for and audience of my writing and make specific improvements to how I address them.	I can use criteria (e.g. continua, editing/proofreading checklist) to revise and edit my writing. I can ask for specific feedback throughout the writing process. I can revise, edit, rewrite, or try a new approach to my writing using others' feedback. I can focus my revisions on those that have the most significance to the purpose and audience of my writing. I can make purposeful choices about the feedback I receive from others, incorporating only those revisions that enhance the purpose for writing and reader experience.

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ELA.4 Write Informative Texts

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I can write informative texts to examine and convey complex ideas and information clearly and accurately through the effective selection, organization, and analysis of content.

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.4.1</p> <p>Introduce the topic</p>	I can introduce the topic I will be writing about.	<p>I can introduce my topic.</p> <p>I can write a thesis statement that previews my main idea and key points (e.g., There are three main steps in the college admission process...).</p>	<p>I can introduce my topic and provide important contextual information.</p> <p>I can write a thesis statement that previews my main idea and key points.</p>	<p>I can introduce my topic and provide important contextual information that orients the reader.</p> <p>I can write a thesis statement that previews my main idea and key points.</p> <p>I can indicate the purpose and organizational structure of my text (e.g. compare/contrast, cause/effect, problem/solution).</p>	<p>I can introduce my topic with an engaging hook, and signal the purpose of my writing to the reader.</p> <p>I can write a focused and specific thesis statement that previews my main idea and key points in the order they will be introduced.</p> <p>I can convey the significance of my topic, indicate the purpose and organizational structure of my text.</p>	<p>I can introduce my topic with an engaging hook that is specific to my audience and format.</p> <p>I can write a focused and specific thesis statement that previews my main idea and key points.</p> <p>I can provide important contextual information to orient the reader, convey the significance of my topic, and indicate the purpose and organizational structure of my text.</p>
<p>ELA.4.2</p> <p>Develop the main idea with key points</p>	<p>I can organize my writing into different parts.</p> <p>I can tell different information about my topic in each part.</p>	I can organize my ideas in a logical order in a format appropriate to the task (e.g., paragraphs).	<p>I can organize my ideas in a logical order in a format appropriate to the task (e.g., paragraphs, subheadings).</p> <p>I can organize related facts, evidence and details to support my key point/s and connect to my purpose for writing.</p> <p>I can include tables, charts, or graphs, that support key points.</p>	<p>I can organize my ideas in a logical order in a format appropriate to the task.</p> <p>I can organize and cite related facts, evidence and details to support my key point/s and connect to my purpose for writing.</p> <p>I can include tables, charts, or graphs, that support my key points.</p> <p>I can use one or more techniques to accurately convey information to the reader (e.g. describing, differentiating).</p>	<p>I can organize my ideas in a logical order in a format appropriate to the task.</p> <p>I can follow the text structure that matches my purpose, audience, and format.</p> <p>I can integrate and cite related facts, evidence and details to support my key point/s and connect to my purpose for writing and to my audience.</p> <p>I can include tables, charts, or graphs, that support my key points.</p> <p>I can use multiple techniques to accurately convey information to the reader.</p>	<p>I can organize my ideas in a logical order in a format appropriate to the task.</p> <p>I can follow the text structure that matches my purpose, audience, and format.</p> <p>I can integrate and cite related facts, evidence and details to support my key point/s and connect to my purpose for writing and to my audience.</p> <p>I can include tables, charts, or graphs, that support each key point.</p> <p>I can address sources of conflicting information, drawing from multiple primary and/or secondary sources.</p> <p>I can use a variety of techniques to accurately convey information and to keep the reader engaged.</p>
<p>ELA.4.3</p> <p>Use words and transitions to create cohesion</p>	I can use transitions to make connections between my sentences (e.g., then, also).	I can use transition words to create a sense of flow (e.g., before, after, or then).	<p>I can use transition words and phrases to create a sense of flow for the reader.</p> <p>I can use transitions to introduce my main idea/s and/or key points (e.g. in addition to, furthermore, for example).</p>	<p>I can use transitions to create a sense of flow and coherence for the reader.</p> <p>I can use transitions to introduce and/or explain the connections between my main idea, key points, and supporting details (e.g. in contrast, by comparison, as a result).</p>	<p>I can use transitions to create a sense of flow and coherence for the reader.</p> <p>I can use transitions to introduce and explain the connections between my main idea, key points, and supporting details (e.g. in contrast, by comparison, as a result).</p> <p>I can write transitions that link new concepts with other information (like returning to, similarly to, unlike) and/or that help connect paragraphs.</p>	<p>I can use original transitions to create a logical flow between my paragraphs and gives the audience a sense of overall coherence.</p> <p>I can use seamless and purposeful transitions and varied syntax to clarify the relationships between my main idea and key points, between my key points and supporting details, and between concepts addressed in my writing.</p>

ELA.4 Write Informative Texts

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I can write informative texts to examine and convey complex ideas and information clearly and accurately through the effective selection, organization, and analysis of content.

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.4.4</p> <p>Use a formal style, objective tone, and advanced vocabulary</p>	<p>I can write in complete sentences with the proper punctuation at the end of each sentence (period, question mark or exclamation point).</p>	<p>I can use complete sentences and avoid most spelling and punctuation errors.</p> <p>I can avoid slang and contractions in my writing.</p>	<p>I can use complete sentences and avoid most spelling, grammar, and punctuation errors.</p> <p>I can avoid slang and contractions in my writing.</p> <p>I can use precise language and domain-specific vocabulary to inform about or explain my topic.</p> <p>I can paraphrase and cite one or more sources to avoid plagiarism according to specific guidelines for the task (e.g., MLA formatting).</p>	<p>I can use complete sentences and avoid most spelling, grammar, and punctuation errors.</p> <p>I can establish and maintain a formal style and objective tone.</p> <p>I can use precise language and domain-specific vocabulary to inform about or explain my topic.</p> <p>I can paraphrase, integrate in-line quotations, and cite multiple trusted sources to avoid plagiarism according to specific guidelines for the task (e.g., MLA formatting).</p>	<p>I can submit writing free of most errors in grammar, usage, and mechanics.</p> <p>I can establish and maintain a formal style and objective tone, while using writing conventions that match my purpose, audience, and format.</p> <p>I can use domain-specific and technical vocabulary that relates to my topic, and provide definitions and/or context to support the reader's understanding.</p> <p>I can paraphrase, integrate in-line quotations, and cite multiple trusted sources to avoid plagiarism according to specific guidelines for the task (e.g., MLA formatting).</p>	<p>I can submit writing free of most errors in grammar, usage, and mechanics.</p> <p>I can establish and maintain a formal style and objective tone, while using writing conventions that match my purpose, audience, and format.</p> <p>I can purposefully integrate relevant domain-specific and technical vocabulary, and use a variety of techniques to support the reader's understanding (e.g., definitions, anecdotes, scenarios).</p> <p>I can paraphrase, integrate in-line quotations, and cite multiple trusted sources to avoid plagiarism according to specific guidelines for the task (e.g., MLA formatting).</p>
<p>ELA.4.5</p> <p>Provide a compelling conclusion</p>	<p>I can write a conclusion that restates my main idea.</p>	<p>I can write a conclusion that restates my main idea and key points.</p>	<p>I can write a conclusion that summarizes my main idea and key points.</p>	<p>I can synthesize my main points and supporting evidence to pull it all together for my reader.</p> <p>I can include a relevant insight or quotation from my research.</p>	<p>I can synthesize my main points and supporting evidence to pull it all together for my reader.</p> <p>I can include a relevant insight or quotation from my research.</p> <p>I can propose a course of action, a solution to an issue, and/or discuss broader implications.</p>	<p>I can synthesize my main points and supporting evidence and include in my conclusion key words or parallel concepts and images from my introduction to bring the reader full circle.</p> <p>I can include a relevant insight or quotation from my research.</p> <p>I can propose a course of action, pose a provocative question, discuss broader implications, and/or suggest solutions or future ways for the topic to develop and change.</p>
<p>ELA.4.6</p> <p>Strengthen writing through revision</p>	<p>I can proofread my writing to make sure it makes sense.</p> <p>I can work with my teacher to revise or edit my writing to make it better.</p>	<p>I can proofread my writing to make sure it makes sense and to fix mistakes I made (e.g., capital letters, punctuation, spelling).</p> <p>I can use feedback from my teacher to revise and edit my writing to make it better.</p>	<p>I can use criteria (e.g. continua, editing/proofreading checklist) to revise and edit my writing.</p> <p>I can revise, edit, or rewrite parts of my writing after receiving feedback from my teacher.</p>	<p>I can use criteria (e.g. continua, editing/proofreading checklist) to revise and edit my writing.</p> <p>I can revise, edit, rewrite, or try a new approach to my writing using others' feedback (e.g. teacher, peer).</p>	<p>I can use criteria (e.g. continua, editing/proofreading checklist) to revise and edit my writing.</p> <p>I can ask for specific feedback throughout the writing process.</p> <p>I can revise, edit, rewrite, or try a new approach to my writing using others' feedback.</p> <p>I can identify the purpose for and audience of my writing and make specific improvements to how I address them.</p>	<p>I can use criteria (e.g. continua, editing/proofreading checklist) to revise and edit my writing.</p> <p>I can ask for specific feedback throughout the writing process.</p> <p>I can revise, edit, rewrite, or try a new approach to my writing using others' feedback.</p> <p>I can focus my revisions on those that have the most significance to the purpose and audience of my writing. I can make purposeful choices about the feedback I receive from others, incorporating only those revisions that enhance the purpose for writing and reader experience.</p>

ELA.4 Write Informative Texts

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I can write informative texts to examine and convey complex ideas and information clearly and accurately through the effective selection, organization, and analysis of content.

Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
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ELA.5 Write Narratives

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I can write narratives to develop real or imagined experiences or events using effective technique, well-chosen details and well-structured event sequences.

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.5.1</p> <p>Engage and orient the reader in the opening</p>	I can introduce the setting of the story and the main character/s.	I can use details to introduce the setting, main character/s, and the first events of the plot.	<p>I can introduce the setting, main character/s, and the first events of the plot.</p> <p>I can establish a clear point of view that continues throughout the story.</p>	<p>I can introduce the setting, main character/s, and the first events of the plot.</p> <p>I can establish a clear point of view that continues throughout the story.</p> <p>I can introduce a conflict that will drive the action.</p>	<p>I can introduce the setting, character/s, and the first events of the plot.</p> <p>I can establish one or more points of view that continue throughout the story.</p> <p>I can introduce a conflict that will drive the action.</p> <p>I can convey the significance of the conflict in my introduction.</p>	<p>I can introduce the setting, character/s, and the first events of the plot.</p> <p>I can establish one or more points of view that continue throughout the story.</p> <p>I can introduce a conflict that relates to a universal theme or issue that will drive the action.</p> <p>I can convey the significance of the conflict in my introduction.</p> <p>I can create an experience for my audience that involves suspense or uncertainty.</p>
<p>ELA.5.2</p> <p>Develop the story and characters</p>	<p>I can develop a story that has a plot.</p> <p>I can organize the events of the plot with one coming after the other.</p>	<p>I can use details to develop a story that combines action, dialogue, and description.</p> <p>I can organize the events of the plot in a logical way.</p>	<p>I can develop a story that combines action, dialogue, and description.</p> <p>I can create a story where the main character/s reflect on themselves and what is happening.</p> <p>I can organize the events of the plot in a logical sequence (e.g. chronologically, over time).</p>	<p>I can use narrative techniques, such as dialogue, pacing, descriptions, and/or reflection to describe experiences, events, and/or characters.</p> <p>I can develop and present a plot (e.g., written, oral, multimedia) and character/s that develop and change in a logical and realistic way.</p> <p>My story has a clear story arc.</p>	<p>I can use narrative techniques, such as dialogue, pacing, descriptions, and reflection to describe experiences, events, and/or characters.</p> <p>I can develop and present a plot and character/s that develop and change in a logical and realistic way, and that undergo changes that involve tension and/or resolution.</p> <p>My narrative has a clear story arc and central theme.</p>	<p>I can use sophisticated narrative techniques, such as engaging dialogue, artistic pacing, vivid descriptions, complex reflection, and multiple plot lines, to describe experiences, events, and/or characters.</p> <p>I can develop and present a plot and character/s that develop and change in a logical and realistic way, and that undergo changes that involve tension and/or resolution.</p> <p>I can manipulate the pace of my story to match its genre, and to create an experience that keeps the audience entertained and engaged.</p> <p>My narrative has a clear story arc and enduring theme.</p>
<p>ELA.5.3</p> <p>Use words and phrases, details, and sensory language</p>	I can develop a narrative that contains specific details about plot, setting, and characters.	I can develop a narrative that uses sensory language (e.g. sound, taste, touch, smell, sight) to describe details about the plot, setting, and characters.	I can develop a narrative that uses sensory language to capture the action or convey experiences.	I can develop a narrative that uses sensory and figurative language (e.g., including all forms of metaphor) to capture the action and/or convey experiences and events.	<p>I can develop a narrative that uses sensory and figurative language to describe specific details, capture the action and convey experiences and events.</p> <p>When applicable, I can develop a narrative where the narrator and/or characters speak using language and/or dialect that matches their identities.</p>	<p>I can develop a narrative that uses sensory and figurative language to describe vivid details, capture the action, and remind the reader of their own experiences, giving your writing a universal feel.</p> <p>When applicable, I can develop a narrative where the narrator and/or characters speak using varied languages and/or dialects appropriate to their identities.</p>

ELA.5 Write Narratives

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I can write narratives to develop real or imagined experiences or events using effective technique, well-chosen details and well-structured event sequences.

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.5.4</p> <p>Use words and transitions to create cohesion</p>	I can use transition words in my narrative (e.g. before, after, then).	I can use time transition words or phrases to sequence my story and to show shifts in time and place (e.g. suddenly, just then, a little while later).	I can use transitions (words, phrases, clauses) to convey sequence or shifts from one time frame to another (e.g. back at the ranch, before they arrived).	<p>I can use a variety of transitions to convey sequence or to introduce changes in setting, plot, and character/s.</p> <p>I can use transitions to link the sections of my narrative (e.g. time, cause and effect).</p>	<p>I can use original transitions to convey sequences and to signal changes in setting, plot and character/s.</p> <p>I can use transitions to link the sections of my narrative in a way that creates a sense of flow and cohesion for my audience.</p> <p>I can use transitions to connect events with their causes (e.g. because of, although, little did she know that).</p>	<p>I can use transitions to build relationships between the sections of my narrative, and create a sense of cohesion across the whole story.</p> <p>I can seamlessly shift from one section of my narrative to another using a variety of techniques including original transitions.</p> <p>I can effectively use transitions to show shifts or interruptions in time, events, or experiences.</p>
<p>ELA.5.5</p> <p>Provide a compelling conclusion</p>	I can present a clear ending to my story.	I can present a clear ending to my narrative that fits with my story.	I can present a clear ending to my narrative that results from the specific events described in the plot.	I can present a clear ending to my narrative that results from the events in the plot and has either the narrator or characters reflecting on their experiences or conveying a lesson.	I can present a clear, logical ending to my narrative that reflects on the experiences of the story and resolves the story appropriately for its genre (e.g. tragedy, comedy).	I can present a clear, logical ending to my narrative that reflects on the experiences of the main character/s, and resolves the story in a way that has an impact on the audience.
<p>ELA.5.6</p> <p>Strengthen writing through revision</p>	<p>I can proofread my writing to make sure it makes sense.</p> <p>I can work with my teacher to revise or edit my writing to make it better.</p>	<p>I can proofread my writing to make sure it makes sense and to fix mistakes I made (e.g., capital letters, punctuation, spelling).</p> <p>I can use feedback from my teacher to revise and edit my writing to make it better.</p>	<p>I can use criteria (e.g. continua, editing/proofreading checklist) to revise and edit my writing.</p> <p>I can revise, edit, or rewrite parts of my writing after receiving feedback from my teacher.</p>	<p>I can use criteria (e.g. continua, editing/proofreading checklist) to revise and edit my writing.</p> <p>I can revise, edit, rewrite, or try a new approach to my writing using others' feedback (e.g. teacher, peer).</p>	<p>I can use criteria (e.g. continua, editing/proofreading checklist) to revise and edit my writing.</p> <p>I can ask for specific feedback throughout the writing process.</p> <p>I can revise, edit, rewrite, or try a new approach to my writing using others' feedback.</p> <p>I can identify the purpose for and audience of my writing and make specific improvements to how I address them.</p>	<p>I can use criteria (e.g. continua, editing/proofreading checklist) to revise and edit my writing.</p> <p>I can ask for specific feedback throughout the writing process.</p> <p>I can revise, edit, rewrite, or try a new approach to my writing using others' feedback.</p> <p>I can focus my revisions on those that have the most significance to the purpose and audience of my writing. I can make purposeful choices about the feedback I receive from others, incorporating only those revisions that enhance the purpose for writing and reader experience.</p>

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[Lead Author: Sandra Mounoutjis for Building 21](#)

Lead Author: Sydney Schaef

Sources: [English Language Arts Common Core State Standards](#)

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ELA.6 Engage in Discussions

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I can prepare for and actively participate in collaborative discussions by critically listening to the perspectives of others and responding appropriately with my evidence-based ideas and perspectives.

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.6.1</p> <p>Demonstrate preparedness and responsibility</p>	<p>I can come to the discussion ready to share.</p>	<p>I can come to the discussion prepared with relevant materials (e.g. text, notes).</p> <p>I have reviewed the norms for the discussion and am ready to participate.</p>	<p>I can come to the discussion with all relevant materials and evidence that I prepared for the discussion (e.g. annotated text, notes).</p> <p>I have reviewed the norms for the discussion and am ready to participate.</p>	<p>I can come to the discussion with all relevant materials including the completed prep work defined by my teacher.</p> <p>I have reviewed the norms for the discussion. I have discussed with others ways we can support each other in following the norms, and am ready to participate.</p>	<p>I can come to the discussion with all relevant materials including the completed prep work defined by my teacher. I can apply my reflections and learnings from previous discussions to better prepare for the discussion.</p> <p>I have co-created and/or given feedback to the norms prior to our discussion. I have discussed with others ways we can support each other in following the norms so that we are all ready to participate and bring our best selves to the discussion.</p> <p>I can organize my evidence in a way I can easily access during the discussion.</p>	<p>I can come to the discussion with all relevant materials including the completed prep work defined by my teacher; as well as additional reading or research on the topic or issue. I can apply my reflections and learnings from previous discussions to better prepare for the discussion.</p> <p>I follow a protocol to co-create or revise norms specific to the type or format of the discussion (e.g., fishbowl, silent, socratic, asynchronous online). I have discussed with others ways we can support each other in following the norms so that we are all ready to participate and bring our best selves to the discussion.</p> <p>I can develop my own process to organize my evidence and notes in a way I can easily access during the discussion.</p>

ELA.6 Engage in Discussions

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I can prepare for and actively participate in collaborative discussions by critically listening to the perspectives of others and responding appropriately with my evidence-based ideas and perspectives.

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.6.2</p> <p>Pose and respond to questions</p>	<p>When it's my turn, I can share my opinion about the topic or question asked.</p> <p>I can listen without interrupting when others are speaking.</p>	<p>I can pose a specific question related to the topic, or I can respond to a question in a way that shows my knowledge of the topic.</p> <p>I can follow the discussion norms (e.g., active listening, avoid interrupting, make eye contact, keep a receptive posture).</p> <p>I can stay on topic when I am expressing my ideas.</p>	<p>I can pose one or more questions about the topic to get more information about other people's ideas.</p> <p>I can respond to a question or comment in a way that connects back to the topic or text.</p> <p>I can follow the discussion norms (e.g., active listening, avoid interrupting, make eye contact, keep a receptive posture).</p> <p>I can acknowledge the views of others (e.g., nonverbal signals, emojis, building off others, asking a follow up question, offer a counter claim).</p> <p>I can express my ideas clearly.</p>	<p>I can pose one or more open-ended questions about the topic to get more information about other people's ideas and/or to propel the discussion forward.</p> <p>I can use evidence to support my response to a question about the topic or text.</p> <p>I can follow the discussion norms (e.g., active listening, avoid interrupting, make eye contact, keep a receptive posture).</p> <p>I can acknowledge the views of others (e.g., nonverbal signals, emojis, building off others, asking a follow up question, offer a counter claim).</p> <p>I can express my ideas clearly.</p> <p>I can offer a new insight or make a relevant connection that adds to the discussion.</p>	<p>I can pose a variety of open-ended questions (e.g., exploratory, probing, clarifying) to elicit a wide range of perspectives, gain insights or information, and/or to propel the discussion forward.</p> <p>I can use detailed evidence to support my perspectives and/or to clarify, confirm, or challenge another person's perspective.</p> <p>I can follow the discussion norms (e.g., active listening, avoid interrupting, make eye contact, keep a receptive posture) and I encourage all participants to uphold the norms (e.g., verbal and nonverbal prompts, offer reminders and/or feedback).</p> <p>I can acknowledge and encourage the perspectives of others, seeking to understand perspectives different from my own.</p> <p>I can express my ideas clearly and concisely.</p> <p>I can respond to questions, prompts, or comments in a way that shows my knowledge of the topic and that offers a new insight, perspective, or evidence-based connection.</p>	<p>I can deepen and propel the discussion by posing insightful questions to elicit and challenge a wide range of perspectives.</p> <p>I can use specific evidence to support my perspectives and/or to clarify, confirm, or challenge another person's perspective.</p> <p>I can help create and support the conditions for an equitable and inclusive discussion, seeking to include and/or elicit a wide range of perspectives, and supporting myself and others in participating in the discussion with curiosity and a genuine desire to understand the diverse perspectives of others.</p> <p>I can use evidence from additional reading and research to provide the group with a different perspective, a new piece of information, a new insight, and/or a relevant connection that deepens to the discussion.</p> <p>I can express my ideas concisely and persuasively.</p> <p>I can practice building on the idea/s of another, and/or challenging claims through strategic questioning, citing relevant evidence, and elevating minoritized perspectives.</p>
<p>ELA.6.3</p> <p>Reflect on new learning</p>	<p>I can reflect on what I learned from the discussion.</p>	<p>I can reflect on what I learned from the discussion and how well I contributed.</p>	<p>I can reflect on what I learned from the discussion, how well I contributed, and how the discussion impacted my thinking on the topic.</p>	<p>I can reflect on what I learned from the discussion, how the discussion impacted my thinking on the topic, and which specific reasons deepened or changed my perspective.</p> <p>I can reflect on how well I prepared for and contributed to the discussion.</p>	<p>I can reflect on what I learned from the discussion, how the discussion impacted my thinking on the topic, and which specific reasons or evidence deepened or changed my perspective.</p> <p>I can reflect on how well I prepared for and contributed to the discussion, as well as what I can do in the future to better prepare.</p> <p>I can debrief the discussion with others and give feedback (e.g., how we upheld the norms, how we can improve the discussion or preparation, notable contributions).</p> <p>I can reflect on how well I encouraged and sought to understand the perspectives of others.</p>	<p>I can reflect on what I learned from the discussion, how the discussion impacted my thinking on the topic, and which specific reasons and evidence deepened or changed my perspective.</p> <p>I can reflect on how well I prepared the discussion, and how effectively I contributed, and what I can do in the future to better prepare.</p> <p>I can debrief the discussion with others and give feedback (e.g., how we upheld the norms, how we can improve the discussion or preparation, notable contributions).</p> <p>I can reflect on how I helped to create and support a culture that promoted an equitable and inclusive discussion.</p>

ELA.6 Engage in Discussions

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I can prepare for and actively participate in collaborative discussions by critically listening to the perspectives of others and responding appropriately with my evidence-based ideas and perspectives.

Level 2

Level 4

Level 6

Level 8

Level 10

Level 12

[Lead Author: Sandra Mounoutjis for Building 21](#)

Lead Author: Sydney Schaefer

Sources: [English Language Arts Common Core State Standards](#)

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Last edited: 2022-06-23

ELA.7 Conduct Research

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I can frame and advance an inquiry to investigate topics, build knowledge, and analyze and integrate information.

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.7.1</p> <p>Construct a research question</p>	<p>I can come up with something I want to learn more about.</p>	<p>I can scan sources provided for me in order to help me gain background knowledge on a topic.</p> <p>With guidance from my educator, I can come up with a specific researchable question that relates to the subject area I am studying.</p>	<p>I can read from several different sources to get information about a topic or issue.</p> <p>I can come up with a specific researchable question that relates to my topic.</p>	<p>I can read from several different sources to get information about a topic or issue.</p> <p>I can come up with a specific researchable question that relates to an important issue in the field.</p> <p>During my research process, I can use new information to refine my research question by making it more specific and focused.</p>	<p>I can read broadly across a subject area in order to gain valuable information to help me select a topic or issue.</p> <p>I can define a focused, challenging research question that reflects an enduring issue in the field.</p> <p>I can create a statement of purpose that captures the importance of my question.</p> <p>During my research process, I can use new information to refine my research question by making it more specific and focused.</p>	<p>I can read broadly across a subject area in order to gain valuable information on a topic or issue.</p> <p>I can define a focused, challenging research question that reflects an enduring issue in the field and draws on existing data and/or new data collected.</p> <p>I can create a statement of purpose that captures the importance of my question and its relevance and significance to the field.</p> <p>During my research process, I can use new information to refine my research question by making it more specific and focused.</p>
<p>ELA.7.2</p> <p>Identify and select credible, diverse sources to gather evidence</p>	<p>Using a source provided for me, I can identify key information that relates to my topic or question.</p>	<p>Using different types of sources (e.g., illustrations, graphs, texts, timelines) provided for me, I can identify key information and explain how it relates to my topic or question.</p>	<p>Using different types of sources provided for me or that I have identified on my own, I can identify key information that provides evidence or details related to a specific research question.</p> <p>I can assess the credibility of each source by considering the author, the author's purpose, the publisher or platform, and the date of the publication.</p>	<p>I can use basic criteria (e.g., publisher/platform, author, publication date) and basic search methods and tools (e.g., keywords/categories; databases; websites) to identify and select multiple relevant and credible sources.</p> <p>I can assess the credibility of each source by considering the author, the author's purpose, the date of publication, and the types of sources cited in the publication.</p> <p>I can identify specific evidence related to my research question, drawing from multiple points of view (when applicable).</p>	<p>I can use robust criteria (e.g., affiliate institutions, times cited) and advanced search methods (e.g., academic journals, phrase searching, boolean operators) and tools to identify and select multiple relevant and credible sources.</p> <p>I can assess the credibility and accuracy of each source by considering key factors (author, purpose, publisher/platform, publication date, types of sources cited, how well information from one source can be cross-checked with another source to confirm accuracy).</p> <p>I can gather detailed, comprehensive information reflecting multiple points of view on my topic, and I can identify specific evidence related to my research question.</p> <p>I can note important gaps or limitations in my sources.</p>	<p>I can use robust criteria and advanced search methods and tools to identify and select diverse, relevant and reliable sources in a range of formats.</p> <p>I can assess the credibility and accuracy of each source by considering a broad range of important factors (e.g., formality of language used, types of evidence used to support claims, how well diverse viewpoints are represented, how well specific details from one source can be cross-checked and confirmed with other trustworthy and verified sources), including key events or conditions surrounding the creation of my source/s, and assess how these conditions shaped the meaning or significance of the source.</p> <p>I can gather detailed, comprehensive information from multiple points of view on my topic and specific evidence related to my research question.</p> <p>I can note important gaps or limitations in my sources, and discuss the impact of those gaps or limitations when applicable.</p>

ELA.7 Conduct Research

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I can frame and advance an inquiry to investigate topics, build knowledge, and analyze and integrate information.

	Level 2	Level 4	Level 6	Level 8	Level 10	Level 12
<p>ELA.7.3</p> <p>Use systems to gather and organize information</p>	<p>With guidance, I can capture the key information I have identified using pictures and/or words.</p>	<p>I can capture and organize key information using a basic note-taking system.</p> <p>My notes are clear and include a bibliography of my sources.</p>	<p>I can use a note-taking system to guide my research process.</p> <p>I take careful notes of key facts, ideas, relevant details, and/or important quotes.</p> <p>I can organize my notes in a purposeful way (e.g. by type of source, by claim, by alphabetical order, or by another category).</p> <p>My notes are clear and include complete bibliographic information so that I can avoid plagiarism.</p>	<p>I can use a specific system for note-taking, citing sources, and organizing my research materials.</p> <p>I can take careful notes of key facts, ideas, relevant details, and/or important quotes.</p> <p>In my notes, I can clearly indicate the difference between a direct quotation, a paraphrase, a summary, and a personal thought (e.g. color codes, graphic organizer).</p> <p>My notes are clear, detailed, and include complete citations on all sources so that I can avoid plagiarism.</p>	<p>I have an effective system and set of tools for note-taking, organizing my research materials, and systematizing my research process (e.g. Google Drive, Noodlebib, Asana) to help me achieve my research goals.</p> <p>My notes are purposefully organized, carefully taken (e.g., distinguish between paraphrases, quotations, summaries, and personal thoughts), and include complete citations on all sources so that I can avoid plagiarism and easily generate references/citations for my end product.</p>	<p>I have an effective system and set of tools for note-taking, organizing my research materials, maintaining a research journal to capture my own reflections or insights, and systematizing my research process so that I can efficiently gather the most important information in order to fulfill my research purpose.</p> <p>My notes are purposefully organized, carefully taken, and include complete citations on all sources so that I can avoid plagiarism and easily generate references/citations for my end product.</p>
<p>ELA.7.4</p> <p>Evaluate and synthesize findings</p>	<p>I can talk about what I learned about the topic.</p> <p>I can make a new connection between my understanding of the topic/question and the new information I learned from the source.</p>	<p>I can summarize my research findings.</p> <p>I can compare information from different sources about the same topic or question.</p> <p>I can make one or more new connections between the topic/question and the key information I have identified from one or more sources.</p>	<p>I can summarize my research findings and draw conclusions using details from my sources.</p> <p>I can compare information from different sources that directly inform my research question.</p> <p>I can use details from the sources to explain key insights I have formed about my research question.</p>	<p>I can synthesize my research findings, and draw logical conclusions based on details and evidence from my sources.</p> <p>I can analyze different points of view that are represented in each of my sources about my research topic or question.</p> <p>I can use details from the sources to explain key insights I have formed about my research question.</p>	<p>I can synthesize my research findings, and draw logical conclusions based on details and evidence from my sources.</p> <p>I can analyze different points of view that are represented in each of my sources about my research topic or question.</p> <p>I can propose areas for further research that would help strengthen the research base for my topic or primary question.</p>	<p>I can synthesize my research findings, demonstrating deep understanding of the subject under investigation.</p> <p>I can analyze major points of agreement and disagreement that experts have about my research topic or question, based on the information provided in my sources.</p> <p>I can draw logical, evidence-based conclusions while drawing on multiple, diverse and credible sources and avoiding over reliance on any one source.</p> <p>I can propose suggestions for future research that are challenging, relevant, and important to my topic of study.</p> <p>I can address some of the most significant assumptions made in my research.</p>

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[Lead Author: Sandra Moumoutjis for Building 21](#)

Lead Author: Sydney Schaeff

Sources: [English Language Arts Common Core State Standards](#)

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Last edited: 2018-07-20

Academic School Year	Grade Levels	Total Projected Student Enrollment
Year 1	k,1,2,3,4,5	400
Year 2	k,1,2,3,4,5,6	500
Year 3	k,1,2,3,4,5,6,7	600
Year 4	k,1,2,3,4,5,6,7,8	700
Year 5	k,1,2,3,4,5,6,7,8	800

TO: Charter School Advisory Board Members, State Board of Education
FR: Ashley Martin, Director of Exploring New Schools Model | New Leaders Organization
RE: Carolina Achieve Charter Application
Date: April 10th, 2023

To whom it may concern:

I am writing this letter in support of Tiffany Alrefae, Founding Head of School, as her mentor, and her school, Carolina Achieve, a proposed inclusive K-8 public tuition-free school in the West Triangle area that would serve students in Orange County, Chapel Hill, Durham, Eastern Alamance, Chatham County, and Wake County. Mrs. Alrefae is currently a fellow in the New Leaders' Exploring New School Models (ENSM) program and has demonstrated strong leadership skills and commitment to equity throughout the program.

During her time in ENSM fellowship, Mrs. Alrefae developed a strong community engagement plan that ensures Carolina Achieve's mission, vision, and model is in alignment with future students and families. Through conducting empathy interviews and shadowing experiences, the school's pillars were designed based on community values and honoring the diversity of all stakeholder groups.

Additionally, Mrs. Alrefae has spent significant time building her capacity to lead for instructional excellence and equity. The school model is based on rigorous standards-based instruction that will ensure all students are exposed to grade-level standards on a daily basis. This summer, the team at Carolina Achieve will launch a pilot of the school model with students in the area to gather data and feedback. They will use this information to iterate the model before the full launch in August 2024. This will ensure the school will have a successful design and launch and meet the needs of its student population.

It is my strong belief that Carolina Achieve if approved, will have a significant and positive impact on all students and families in the community. I have full confidence in Mrs. Alrefae's ability to lead this school to greatness. If you have any questions or would like to discuss my recommendation further, please do not hesitate to contact me.

Sincerely,



Ashley Martin

amartin@newleaders.org

Industrial Paradigm

vs.

Student-Centered Paradigm

Purpose

Sort and rank adults into factory roles

Purpose

A high-quality education for all students in order to unlock their full potential to thrive and enable them to contribute to the world around them

Fixed Design Elements

Same-aged cohorts assigned to grade-level based on age

Uniform content for all students

Teacher-directed learning inside physical classrooms

Fixed Design Elements

Designed to deliver the Resulting Student Experience

Resulting Experiences

Unequal expectations and opportunities

Narrow focus

Rote activities

Irrelevance

Assimilation and marginalization

Reinforcement of the status quo

Isolation

Inflexible systems

Passive compliance

Siloed schooling

Resulting Experiences

High expectations with unlimited opportunities

Whole-child focus

Rigorous learning

Relevance

Affirmation of self and others

Self-consciousness and action

Connection and community

Customization

Active self-direction

Anytime, anywhere learning

Systemic Implications

One-third of students college and career ready

Persistent gaps in achievement across racial, ethnic, and economic lines

Stagnating performance on international benchmarks

Unsustainable role for teachers

Limited role for parents

Few levers for systemic reform

Systemic Implications

Vast majority of students achieve college and career readiness

Performance not predictable based on racial, ethnic, or economic identifiers

Significantly improved performance on international benchmarks

Sustainable role for teachers

Integrated role for parents

More levers for systemic improvement



April 25, 2023

Dear NC State Board of Education and Charter School Advisory Board,

I am thrilled about Carolina Achieve's interest in exploring a partnership with the Learning Innovation Network at Building 21. As the Executive Director of the Learning Innovation Network at Building 21, I have had the pleasure of working with a variety of schools and organizations that prioritize personalized learning experiences for students. Based on my experience and knowledge, I believe that a partnership between Building 21 and Carolina Achieve has the potential to create a transformative educational experience for students in North Carolina.

At Building 21, we are committed to advancing learner-centered education and competency-based frameworks, and we see that same dedication in Carolina Achieve's proposed approach. As such, we would like to explore ways in which we can work together to support the development and implementation of competency-based frameworks, professional development, and leadership coaching.

Competency-based education is an approach that emphasizes the mastery of skills and knowledge over traditional measures of academic progress, such as grades or test scores. This approach encourages students to take ownership of their learning and progress at their own pace. It also requires students to apply their learning in meaningful ways. By implementing this model, Carolina Achieve is creating an environment that fosters critical thinking, problem-solving, and self-directed learning. At Building 21, we have built and implemented our competency-based framework and personalized learning model in our two lab schools, and we are excited to work with Carolina Achieve to implement their learner-centered, competency-based vision.

Professional development and leadership coaching are crucial components of any successful educational endeavor, and we believe that our experience at Building 21 can provide valuable support to Carolina Achieve. We can offer guidance and support in the development of leadership structures, coaching, and ongoing professional development to ensure that their school is well-positioned to create a positive and effective learning environment for students. We can also support Carolina Achieve in tracking, monitoring, and communicating progress and growth across all of the competencies to all relevant stakeholders.

Through our partnership, we believe that we can make significant strides toward advancing learner-centered education and competency-based frameworks. I am confident that a partnership between Building 21 and Carolina Achieve will be a mutually beneficial endeavor that will have a positive impact on students, families, and the community.

Sincerely,

A handwritten signature in black ink, appearing to read 'Sandra Moumoutjis', with a long horizontal flourish extending to the right.

Sandra Moumoutjis
Executive Director, Learning Innovation Network
Building 21
sandra@b-21.org



“Connecting Students to Literacy”

April 26, 2023

To whom it may concern:

I am pleased to inform you that I have agreed to mentor Tiffany Alrefae, Founding Head of School at Carolina Achieve in opening and running her new K-8 charter school. As the Director of Operations at Bridge Preparatory Charter School, the first public school in New York State designed specifically for students with dyslexia and other language based needs, I am excited about the opportunity to work with her and her team to provide guidance in the areas of special education.

I recognize that special education is a crucial aspect of any school, and I am committed to sharing my expertise in this field. I have been a special educator for fifteen years, serving in the classroom and a variety of administrative roles, always working to drive the quality of instruction and school design forward for all students, but specifically those with the highest needs. My experienced team has successfully implemented various programs to meet the needs of students with disabilities at our school in NYC. We understand the challenges that come with providing quality education to students with special needs, and we are eager to share our knowledge and experience with Ms. Alrefae.

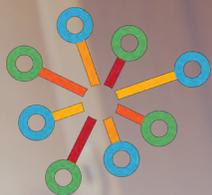
My goal is to help her create a high-quality education program that meets the unique needs of her students with disabilities. I look forward to working with Tiffany and the Carolina Achieve team in the coming months. Please feel free to contact me if you have any questions or concerns.

Educationally yours,

A handwritten signature in blue ink, appearing to read "Faron Ebanks", written in a cursive style.

Faron Ebanks

CUMMING
Building Value Through Expertise



DURHAM
PUBLIC SCHOOLS

Durham Public Schools

2019 Long Range Facility Assessment

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DURHAM

PUBLIC SCHOOLS

Acknowledgement

The information contained within this report could not have been obtained, nor would it have been as complete had Cumming not received full cooperation and attention from many of the Durham Public Schools personnel, including principals, school staff, and district-wide departments. Cumming would like to extend its appreciation to:



Board of Education

Mr. Mike Lee, Chairman
Mr. Steve Unruhe, Vice Chair
Ms. Natalie Beyer
Mr. Xavier Cason
Ms. Bettina Umstead
Ms. Minnie Forte-Brown
Mr. Matt Sears

Durham Public Schools Administration

Dr. Pascal Mubenga - Superintendent
Mr. Aaron Beaulieu
Mr. Bernard Hall

Cumming would like to express its gratitude for the opportunity to provide this Facilities Assessment to the Durham Public Schools. We appreciate working with professionals and look forward to continuing this relationship in the future.



DURHAM

PUBLIC SCHOOLS

INTRODUCTION

In its mission, Durham Public Schools strives to provide all

students with an outstanding education. To that end, Durham Public Schools also strives to provide every student, teacher and staff member with outstanding educational facilities. Further, school facilities should support the vision of encouraging involved parents, engaged students, quality staff and inspired learning.

In an effort to continually improve the educational environment of the almost 34,000 children that it serves, the development and continual update of a Long-Range Facility Needs Plan (LRFNP) is critically important. This effort has been in process for many years and the document that follows represents a Long-Range Facility Assessment (LRFA) which is the first step in the creation of the Long Range Facility Needs Plan (LRFNP). The goal of this LRFA is the identification and quantification of current / deferred maintenance and options for capital project that are both comprehensive and proactive. Converting this assessment into a LRFNP includes strategically vetting the options identified in this document in an effort to efficiently and effectively plan for future facility improvements while also addressing the facilities maintenance and life cycle needs.

APPROACH

The cornerstone of the LRFA is the assessment of each facility's condition overlaid with physical needs required to support a safe and productive environment as well as the identification of enhancements that will lead to positive educational experiences. Additionally, this process includes the review of the previous LRFNP to remove items previously undertaken or completed, verification of adequate student capacity based on enrollment projections provided by Operations Research and Education Laboratory (OREd), review of new facility constraints as compared with typical cyclical maintenance needs, and identification of curriculum-based enhancements. Once all items are identified and quantified, a budget estimate is produced with a specific year-based priority so that an appropriate amount of escalation (includes inflation and other factors like local material and labor pricing) can be assigned, producing a "total facility

budget". The District wide forecast is developed by combining a facility budget for each District owned property. The information derived from the LRFA should then be evaluated and thoughtfully developed into a LRFNP that will support the continual improvement in condition, capacity and function of each school in the DPS inventory.

Although the recent decrease in student growth allowed the District to re-evaluate its facility needs and allow a more proactive approach to meeting them, every year brings new challenges and issues to address. One such challenge is the K-3 Legislation and the fact that it reduced the overall capacity of the District by 16-18%. The K-3 Legislation impact cannot be understated even as the student enrollment within the district is in a declining state.

The decline in student population over the next 10 years can mainly be attributed to outside pressures from private schools, charter schools, and home schooling. This decline will allow the District to focus on improvements to existing aging facilities that are in need of building updates and life cycle renovations. These improvements along with classroom additions will also support the District's goal of removing all mobile units from its school campuses. Mobile units by nature are a temporary measure to address student growth.

While the need for new buildings are an important component this LRFA; the importance of maintaining existing facilities and ensuring the learning environments are renovated, repurposed, and maintained is always of utmost importance. This 2019 Long-Range Facilities Assessment presents fewer new facilities and continues to place a greater emphasis on upgrading existing facilities. Durham has invested wisely in its school campuses, its buildings, and its classrooms. Building on this success and taking care of the community's investment in the decade to come will help ensure a high-quality school environment for all.

PRIORITIZATION OF NEEDS

Capital and Deferred Maintenance expenses are

those limited to building and site improvements, not equipment and furniture. However, this study includes cyclical refreshment of furniture at each facility as well as for technology. These lump sums are not designated for specific items, only a global attempt to project anticipated expenditures.

All systems and building components were reviewed individually then viewed holistically in order to assign priorities all items whose failure might cause a breakdown of other systems or even cause occupancy issue of the building. For example, a fire alarm system replacement will take precedence over the ceiling tile replacement.

The scale of a project can also affect the choice of priority. Large capital improvements can exceed or drain nearly an entire funding source. Therefore, not all projects can be left intact, but are required to be split up and a separate priority assigned to each component. However, if possible, it is almost always the best to address all differed, current, and near term (> 5 years) needs when addressing a facility. This method will eliminate continuous disruption on a campus, eliminate costly redundant efforts by a contractor, and remove the public perception that capital and maintenance planning are being less than efficient.

Lastly, there is no absolute method or scorecard for prioritizing capital improvements and deferred maintenance. As long as needs exceed funding – and they always will – it is recommended that a balanced approach be taken. Weighing every possible factor and providing a broad coverage of what are all considered critical needs have spelled success and survival in DPS' efforts to develop, maintain, and improve its educational facilities.

Overall Goals:

Each of the previous building programs displayed a balance of the following goals:

1. Provide a safe educational environment
2. Provide new student capacity for growing attendance districts
3. Create new permanent student capacity to re-

- place existing mobile classrooms
4. Upgrade existing facilities for code, function and instructional conditions.

The chronological or prioritized order for the Capital and Deferred Maintenance Assessment is balanced in a similar fashion.

Detailed Criteria:

1. Safety – Little else can be accomplished if school facilities are not safe. Still, even safety can be broken down into three main categories and priorities.

a. Security – Today's world is much different than when many of the District's facilities were designed and built. Unfortunately, the District will have to continue their efforts to upgrade physical and virtual security measures in order to provide a safe working and learning environment.

b. Immediate Hazards – Immediate hazards to students, staff and the public must take priority. Any conditions such as these are typically already known by system staff or brought to the attention of staff by school personnel as soon as they are discovered. Exposed electrical lines, severe trip hazards, entrapment or impalement hazards on playgrounds and traffic/pedestrian dangers are examples of this type of safety issue.

c. Legal Issues – Safety can also be related to legal requirements. These include ADA requirements, building codes, environmental regulations and related laws.

2. Educational Guidelines/Recommendations – Instructional activities are best performed in facilities that meet current physical standards. The North Carolina Department of Public Instruction provides standards for the state's school systems for space allocations, class sizes and specific building and site features. Durham Public Schools in association with CUMMING closely monitors these guidelines and frequently adds its own local touch to each factor. It is important to note that these are guidelines, not legal requirements. Facilities that are close to standards are not deemed to be in dire need of change.

3. Existing Student Capacity – Student capacity of each facility is calculated by analyzing both its design and use. When core and classroom spaces are overcrowded, instructional activities are hindered. Several schools use mobile units to supplement their space needs, yet these do not increase core space capacity. The number of mobile classrooms in use and the status of its core spaces (media, gym, cafeteria, computer, admin, etc.) affect whether a school needs an expansion or relief by building another school elsewhere.

4. Future Student Capacity – Durham Public Schools works to stay tuned into community development and planning efforts. When residential developments are planned (re-zoned), the District is often contacted and is made aware of such plans. This information is also used as a method of student enrolment projections by the OREd. The pending result, such as adding hundreds of students to a school that is already full, may greatly affect the priority of onsite expansion or building new schools.

5. Existing Facility Conditions – The condition of Durham Public School’s current facilities is assessed and categorized by several components.

a. New Construction – Enrollment issues or the goal of removing mobile units for the campus typically drive the need for new construction but in some cases, the need for new construction on a campus is driven to replace a structure or enhance a program.

b. Renovation – Renewal of interior finishes is typically not a high priority item; however, it is the criteria that a facility is “judged” by. Certainly, this is not solely a reason to undertake a renovation, but interior finishes do have a life expectancy horizon and should be addressed as part of other priority work scopes.

c. Site Condition – Site issues may include safety-related matters such as traffic and congestion. Other issues include parking, playgrounds, athletics, service and emergency vehicle access.

b. Building Envelope – These issues include building systems such as roofing, windows, walls, and structural components. A leaky

roof beyond general patching is cause for priority. Energy Efficiencies of the envelope are also considered.

c. Building Finishes – Building features such as flooring, painting, and other finishes are assessed and unless included in a major renovation project, these items are best suited for funding with capital funds due to their known life-cycle and replacement schedule.

b. Building Systems – These issues include lighting, heating and cooling, electrical, plumbing, and similar matters. A badly lit building or malfunctioning heating system is cause for priority. While some receive oversight from central staff, all services to building occupants such as custodial, maintenance, child nutrition, technology and others are delivered on site in some fashion. Wiring, equipment, functional space and other factors must be considered to ensure how well these services are delivered. For example, a kitchen that is too small hinders production and school schedules.

6. Time – One of the most difficult factors to balance is time. Asking “How long has a facility gone since its last upgrade, expansion or improvement?” is a valid yet subjective question when the significance of needs may not favor sites which have waited the longest. The District should develop and maintain a “History of Capital Improvements”, inclusive of all major maintenance and capital work implemented on a campus. This will allow a quick reference for needs based on life expectancy as well as provide a defensible position with regard to public perception of certain facilities being “favored” over others.

7. Funding Sources – How an improvement gets funding is, in fact, a very significant factor in its chronological priority or its inclusion in certain project groupings.

County GO Bonds - These funds are long-term debt with potential effect on the local property tax rate. Bonds such as these typically support large-scale capital projects such as new schools, expansions and sizable renovations. Small-scale improvements are not typically supported unless included within a larger project or not able to be funded through any other source.

Annual Capital Outlay Funds – These funds are a portion of the local county contribution to the DPS overall budget. Annual Capital Outlay funds focus primarily on expenses that are predictable in schedule due to the known life of the product or system. These include not only building improvements but also the replacement of operational equipment and furnishings as well. Current annual allotments of these funds are approximately one-fourth of the identified need.

Public School Building Capital Funds – These state dollars are typically used to supplement annual capital projects such as roofing systems, HVAC work and similar projects. If needed, they can supplement large bond projects as well.

State Lottery Funds – DPS receives a distribution from the state lottery that typically is used to address current and deferred maintenance.

State Bond – It appears that North Carolina will pursue a state referendum in the approximate amount of \$1.9 billion in 2020. These funds will be disbursed to all North Carolina school districts and if the referendum is successful, DPS would receive approximately \$10 million.

Other Sources – Additional sources are available though some should be considered less likely to occur. The county could consider two-thirds bonds, “pay as you go” funding, or C.O.P.’s.

Summary

In summary, criteria for determining the priority or order for capital improvements and deferred / current maintenance vary from objective statistics, safety, subjective time factors, and many others. Placing a numerical value on a scorecard may work well until money, time and subjective outlooks weigh-in. The DPS Administration should continue to implement a balanced approach to placing priority and chronological order to the endless capital improvements needed to meet the needs of the system.

PLANNING FOR SCHOOL CAPACITY

Ensuring adequate capacity for student enrollment in a

school system can be extremely challenging. Developing and implementing plans to ensure that the educational and support spaces are adequate can be an abstract process: given one component of the equation is fixed and the other an educated guess. The goal is to ensure that the following equation stays true:

$$\text{Student Capacity} \geq \text{Student Enrollment}$$

Although student capacity is generally constant and established at the time the facility is constructed, renovated, or expanded, and it does not deviate significantly, there are influences that cause the numbers to change such as: a) adjustments to the Student / Teacher ratio (due to K-3 Legislation); b) changes in Curriculum and its discharge to the students; c) inclusion of temporary educational spaces (mobile units) on a campus (mobile units allow a facility to house more students by increasing classroom space, but they actually impact the facility in an inverse manner by putting pressure on core components such as the kitchen / cafeteria, media center, PE or Gym, and traffic related support.)

The State of North Carolina regulates the class size for school systems by listing the optimum size, then allowing classrooms to exceed it to an absolute maximum as long as the system's average does not exceed the optimum level. In other words, it is okay to exceed the optimum level if another classroom is below it. This can cause some to think that there is extra room in some locations – but there actually must be in order for the average to meet state requirements. However, recent state legislation has caused changes in the student teacher ratio and class size at the elementary level which had effectively decreased all elementary school's student capacities.

Student enrollment is always a variable in the equation and there are many methods and methodologies that are implemented in the effort to develop accurate and usable forecasts, such as: a) Cohort Survival / Birth Rate; b) Economic Impacts / New Housing; c) Historic Trends. Each of these methods can be employed and each can be successful depending upon the specifics of each District to which they are applied. Often, multiple methodologies are used. For

DPS, NC State's Operations Research and Education Laboratory (OREd) has been retained as the demographer. The OREd models use a mixture of these methods in an effort to "clear the crystal ball".

Once the capacities and enrollment projections are defined, they are reviewed at a District-wide level and then facility-specific levels. Often the District-wide comparisons show that the equation is proven and that the District has no cause for concern until each facility is reviewed. For a facility that serves a specific attendance zone, dependent on the land use and housing, a situation can occur whereas it is at or above capacity while other like facilities in the District are below capacity. Historically, there would only be three options to relieve the pressure of such a situation: a) Change the attendance zones to balance enrollments; b) install mobile units (short term) / expand the crowded facilities; c) construct classroom additions. d) Of course, there is a fourth option for a district that assumes geographic specific growth: build new facilities coupled with revising attendance zones. However, DPS has developed and implemented an approach to help "balance" enrollment with capacity by utilizing choice schools. And, although very beneficial, choice schools can add an additional layer of complexity on a year to year basis.

The Economic Element vs. School Element

The Durham LRFA recognizes the issue of school capacity as a major factor in growth, development and planning. Although growth for a city or region is vital, such growth can create a negative cycle for a school district. As an example of the "economic element vs. schools' element" relationship, if a certain school attendance zone becomes subject to a new housing development, the occupants of the new homes will impact the specific school in a relationship of approximately 0.42 children per residence. Therefore, for a facility that historically has had capacity, it could become a "hotspot" if a safety check were not in place. The safety check limits new development, through zoning amendments. In the above scenario, the development would be limited to a specific number of units so that the number of potential students that would populate a facility would not exceed 110% of its established level of service. However, DPS strongly recommends that lower percentages be used to determine when development cannot be

allowed due to school overcrowding. In looking at state requirements, 100% would seem correct, yet there is some allowance for using mobile classrooms. As stated, such mobile classrooms stress and overload core components. No matter how many mobile units are placed on site, the core facilities can only function properly within the range of their design.

Furthermore, the District should verify capacity before limiting development requests. In other words, if a new housing development is sought next to an overcrowded elementary school in southern Durham, it would still be allowed if there is room in another elementary school across the county in northern Durham. However, a more localized approach is recommended so that capacity limits be considered at each attendance district prior during said development requests.

Durham Public Schools employs the Operations Research / Education Lab (OREd) as their demographer. As such, OREd has recently completed a capacity study, enrollment forecast, and published their findings entitled Durham Public Schools Enrollment Forecast: Research Approach, Results, and DPS Recommendations". This document is included in its entirety in the appendix of this report but the "Out of Capacity" table is included as an exhibit on the following page. We singled out this table and included it in the body of the report for quick reference and due to its importance associated with our due diligence effort in identifying current and future needs for additional classroom space based of their findings on facility capacity and projected enrollment. Additionally, the full report from OREd includes recommendations for addressing enrollment across the District and should be included in concert with this LRFA and considered in the effort of converting this document into the District Long Rang Facility Needs Plan (LRFNP).

CAPACITY & PROJECTED ENROLLMENTS

Durham Public Schools Out-of-Capacity Table

- 2018-19 Month-1 ADM provided by NC DPI
- Capacities provided by Durham Public Schools (1/11/2019), mobile units not included.
- *** Indicates lottery magnet school

Elementary Schools

Bethesda Elementary
 Burton Elementary***
 Eastway Elementary
 Easley Elementary (Year Round)
 Eno Valley Elementary
 Club Boulevard Elementary***
 Creekside Elementary
 Glenn Elementary
 Hillandale Elementary
 Hope Valley Elementary
 Holt Elementary (Year Round)
 Forest View Elementary
 Lakewood Elementary
 Little River (K-8)
 Fayetteville Street Elementary
 George Watts Elementary***
 Mangum Elementary
 Merrick-Moore Elementary
 Morehead Montessori***
 Oak Grove Elementary
 Parkwood Elementary
 E K Powe Elementary
 Pearsons town Elementary (Year Round)**
 R N Harris Elementary***
 Sandy Ridge Elementary***
 Southwest Elementary
 C C Spaulding Elementary
 Spring Valley Elementary
 W G Pearson Elementary***
 Y E Smith Elementary

Capacities	Forecasted Month-1 ADM											
	2018-19	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
684	653	686	714	730	782	798	823	817	820	821	830	
396	350	350	350	350	350	350	350	350	350	350	350	
496	503	460	432	416	397	381	373	371	373	374	378	
499	503	466	458	447	442	433	426	424	426	427	431	
599	445	415	399	386	384	373	373	370	372	373	377	
444	462	462	462	462	462	462	462	462	462	462	462	
686	857	873	891	895	921	941	953	947	952	954	984	
538	637	605	574	535	512	501	497	494	496	497	502	
636	594	566	548	526	518	501	516	513	515	517	522	
575	652	644	632	646	645	640	621	616	620	621	627	
619	350	639	634	633	630	627	615	612	614	616	622	
669	754	740	733	738	731	720	714	710	713	715	722	
351	389	357	340	310	292	290	283	281	282	283	286	
640	495	517	522	530	537	547	555	553	564	560	561	
308	265	250	243	238	223	221	221	219	220	221	223	
293	339	339	339	339	339	339	339	339	339	339	339	
324	321	328	326	314	324	330	320	318	319	320	323	
619	621	597	553	534	531	519	504	500	502	504	509	
214	223	223	223	223	223	223	223	223	223	223	223	
629	534	502	471	448	427	429	423	421	423	424	428	
593	546	544	550	551	549	552	540	536	539	540	545	
509	492	488	481	466	460	441	419	416	418	419	423	
772	796	796	796	796	796	796	796	796	796	796	796	
376	329	329	329	329	329	329	329	329	329	329	329	
555	554	554	554	554	554	554	554	554	554	554	554	
593	602	592	574	581	572	567	569	565	568	569	575	
308	245	247	236	223	224	226	230	229	230	230	233	
542	595	544	673	709	728	754	793	765	789	790	798	
479	430	430	430	430	430	430	430	430	430	430	430	
358	309	294	270	262	254	256	259	258	259	260	263	
Totals	15304	15145	14939	14736	14598	14545	14527	14509	14437	14497	14520	14625

Middle Schools

Brogden Middle
 George L. Carrington Middle
 James E. Shepard Middle***
 Lakewood Montessori Middle***
 Lucas Middle
 Lowe's Grove Middle
 Neal Middle
 Sherwood Githens Middle
 Rogers-Herr Middle***

872	515	560	579	621	588	593	565	561	532	528	518	
1288	921	962	931	877	790	780	768	778	760	742	724	
546	453	453	453	453	453	453	453	453	453	453	453	
300	292	292	292	292	292	292	292	292	292	292	292	
644	512	482	448	424	396	384	365	354	339	336	330	
774	627	717	757	815	810	800	797	832	867	889	866	
810	789	846	874	959	944	872	835	840	880	886	864	
852	995	1100	1140	1094	1038	1010	995	1019	1023	1019	995	
644	637	637	637	637	637	637	637	637	637	637	637	
Totals	6730	5741	6050	6151	6171	5948	5821	5707	5766	5764	5782	5680

High Schools

C E Jordan High
 Hillside (incl. New Tech High)
 Northern High
 Riverside High
 Southern School of Energy and Sustainability

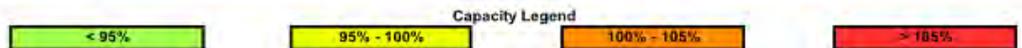
1810	1802	1870	1877	2083	2294	2394	2427	2316	2291	2217	2223
1535	1671	1723	1837	1838	1912	1945	1908	1907	1936	1947	1994
1790	1490	1460	1390	1356	1374	1322	1270	1199	1141	1131	1115
1540	1734	1689	1688	1647	1745	1742	1764	1714	1658	1632	1592
1540	1248	1229	1229	1253	1366	1477	1506	1524	1452	1377	1394

High / 6-12 Choice Schools

The School for Creative Studies***
 J D Clement Early College HS***
 City of Medicine Academy***
 Durham's Performance Learning Center
 Durham School of the Arts***
 Middle College HS @ DTCC

700	605	605	605	605	605	605	605	605	605	605	605
350	393	393	393	393	393	393	393	393	393	393	393
320	345	345	345	345	345	345	345	345	345	345	345
350	186	196	228	195	188	189	187	179	172	165	165
1655	1781	1781	1781	1781	1781	1781	1781	1781	1781	1781	1781
200	189	199	187	177	181	189	193	188	180	173	165

Totals	11790	11544	11490	11540	11671	12184	12382	12378	12144	11894	11766	11771
System Total	33824	32430	32479	32426	32441	32677	32731	32594	32347	32154	32068	32076



FACILITY CONDITION INDEX

The facility condition index (FCI) is an industry recognized

standard of measurement that is indicative of a facilities condition. The FCI for a facility is the ratio of the Cost to Correct a Facility's Deficiencies to the Current Replacement Value of the Facility and can be represented mathematically with the formula below:

$$FCI = \frac{\text{Total Estimated Cost of Maintenance, Repair and Replacement Deficiencies of the Facility}}{\text{Current Replacement Value of the Facility}}$$

The higher the FCI is for a given facility, the poorer the condition of the facility. Below is the scale that is typically used when analyzing FCI:

Good	– 0.0 to .05
Fair	– .05 to .1
Poor	– .1 to .3
Critical	– Greater than .3

Notwithstanding other factors, as the FCI approaches .6, the facility should be considered for replacement.

Each Durham Public School facility has been assigned an FCI number based on the information gathered during this Long Range Facility Assessment. The table on the following pages provides the FCI for each facility ranked from highest to lowest. Knowing a facility's FCI may be useful when comparing one facility to other facilities, tracking facility condition trends over time, prioritizing capital projects, and making renovation versus replacement decisions.

SUMMARY OF FINDINGS

1. Durham Public School System has a history of active building programs financed through public referenda:

- a. 2001: \$51,776,084.00
- b. 2003: \$105,310,180.00
- c. 2007: \$193,448,205.00
- d. 2017: \$90,000,000.00

The \$440,534,469.00 went for both new capital projects as well as existing facility maintenance needs and the average expenditure per year since 2001 equals \$24,474,137.20 per year. These funds were enhanced with other sources, such as state lottery, but the pent-up maintenance demand between the last two referendum is a weakness and potentially responsible for higher District wide deferred maintenance needs.

2. DPS facilities included in the study, depending on options, will require over \$700 million in new capital and deferred maintenance projects over the next ten years. The immediate needs, which include projects identified as needed between 2019 and 2024 total almost \$500 million.

3. The facility analysis reviewed each facility's student capacity, current and future enrollment and recognize the downward trend, as follows:

- a. Each elementary school was negatively impacted with respect to student capacity due to the North Carolina K-3 Legislation (NC House Bill 90).
- b. Although student population in Durham County is increasing, use of alternate education systems, such as charter schools, private schools, home schooling, is being employed to the point that the overall student population educated by Durham Public Schools is decreasing.

4. Many school facilities have mobile units on their campuses that are used as classrooms and for security reasons, a plan should be implemented to phase them out as soon as possible. In some cases, the mobile units will need to be replaced with permanent classroom additions, in other cases, the reduction in student population will allow these units to be removed once the enrollment level

allows all students to be housed in the school proper.

5. Many of the District Facilities were constructed before 1985 and therefore, the following is recommended:
- a. 1940's – 1990's – Some building products still contained asbestos, If not already inventoried, the District should procure or update an Asbestos Hazard Emergency Response Act (AHERA) report for each facility.
 - b. <1978 – Lead based paint was phased out in 1978, therefore facilities built before the phase out likely contain lead-based paint. Most likely this paint has been encapsulated and prior to any demolition or disturbance of original surfaces, further testing should be undertaken.
 - c. <1985 – Lead based solder was often used with water distribution systems of buildings prior to 1985 and therefore water quality tests should be conducted on a regular basis.
 - d. <1989 – Concrete Masonry Units (CMU) contained crystalline silica prior to 1989.

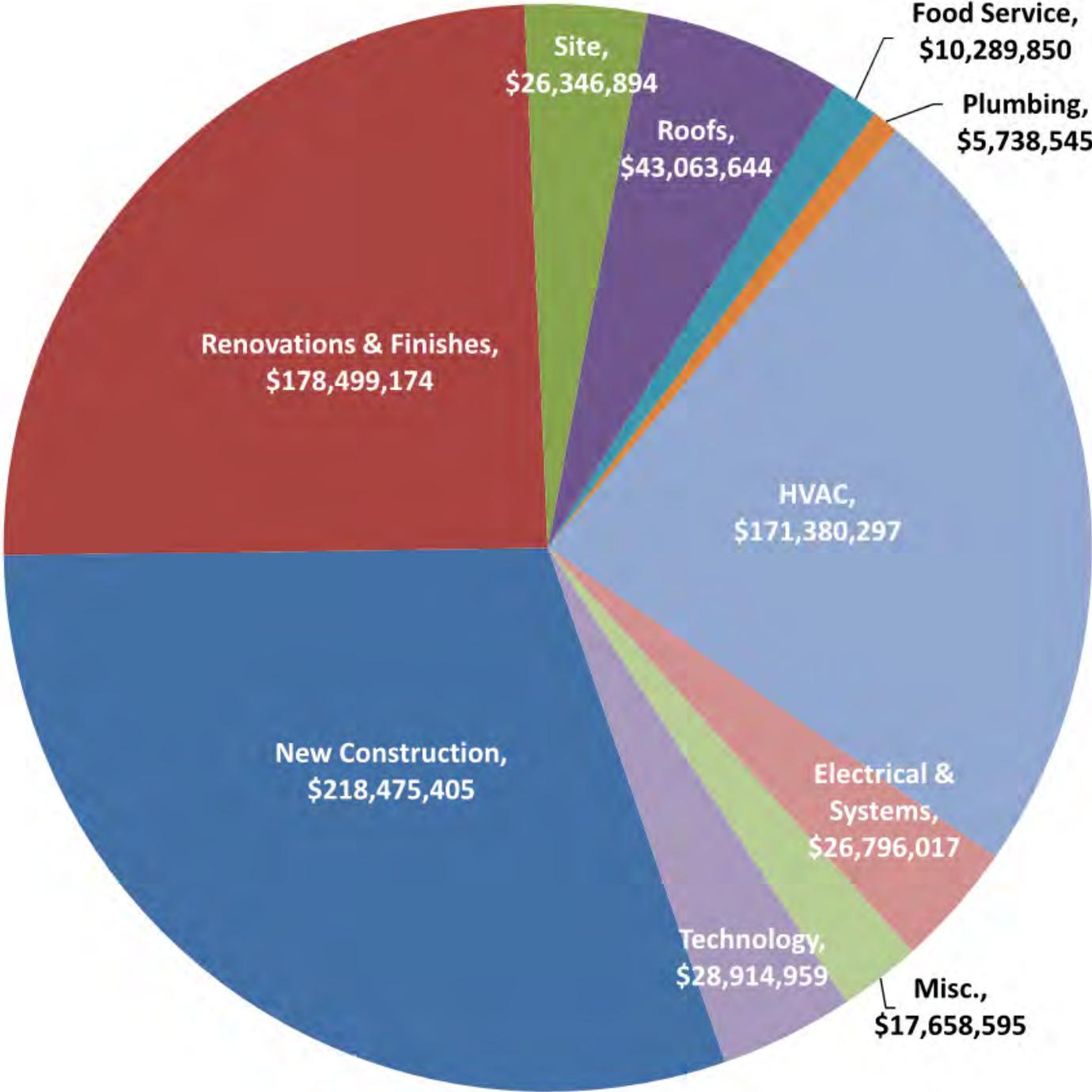
It should be noted that the District employs a third party to maintain the AHERA report and it is incorporated into every project to ensure all necessary steps and precautions are taken.

6. Site related needs included patching, resurfacing asphalt parking lots, replacing broken or uneven sidewalks, developing ADA access where absent, and correction of stormwater drainage issues. Overall, the biggest need for the District is preventative maintenance for parking lots.

7. Interior finishes throughout the District are in fair to poor condition and in many cases overdue of the typical 20-year cycle renovation. Additionally, due to the age of many facilities, the District should reference and adhere to the AHERA surveys during the design phase of any project to ensure that all safety precautions are being followed. Overall, it is anticipated that there exists over \$180 million of needs associated with renovations and finishes.

8. DPS has a District wide roof survey and condition analysis from Bute, PLLC. All information, including anticipated cost, schedule, are consolidated in the this LRFA document. \$44.5 million worth of roofing needs should be addressed by DPS by 2028.
9. In general, plumbing systems and fixtures were in good to fair condition, however, all remaining high flow fixtures should be replaced and a proactive approach to replacement of water heaters should continue. Overall District needs associated with plumbing system maintenance is approximately \$5 million through 2028.
10. The majority of the District's Heating Ventilation and Air Conditioning (HVAC) systems are hydronic type systems which use chillers, boilers, and interior air handlers to distribute the conditioned air. DPS employed Sud Associates, PA to conduct a review of fifteen (15) facilities and their report is consolidated along with other findings in this LRFA document. It should be noted, that HVAC system deferred, and current needs form the largest percentage of overall maintenance needs with respect to expected expenditures, at \$171.5 million over the next ten years.
11. Some electrical distribution systems and components were identified as exceeding their life expectancy as well as being problematic to the maintenance department. The systems and components in question should be further investigated using infrared testing to determine work scope of corrective measures prior to project budgeting and design.
12. The District should continue the interior lighting upgrade initiative which includes replacement of all incandescent, fluorescent, sodium vapor, and other type light fixtures with LED light fixtures.
13. All facility fire alarm systems reviewed were in working order, but some are past their typical life expectancy. It was also noted that most District facilities do not have fire sprinkler systems.
14. Communications systems were observed to be in working order, although some required more work orders than typical. Also, some of the systems were noted to be past their useful life.
15. Security systems, inclusive of intrusion and camera systems should remain a priority for the District to maintain as safe environment for staff and students.
16. There are many funding options available to DPS to consider but the typical approach for funding such a large amount of current and deferred needs is through a bond referendum.
17. The breakdown of new capital, deferred, current, and future needs:

CAPITAL & DEFERRED COST BREAKDOWN





DURHAM

PUBLIC SCHOOLS

FINANCIAL INTRODUCTION

One of the most common problems any multi facility

owner faces is securing adequate financial support to address constant maintenance needs in order to keep their buildings in good working order. Unfortunately, it is rare that enough funds are available to address all maintenance needs, so Owners are faced with prioritizing amongst the needs and funding work scopes that are or have become critical and deferring the remaining work scope to a subsequent time that funding is available. The work scope items that are not addressed are identified as deferred maintenance and these items, combined with maintenance needs in following years can become unsustainable and cause facilities to develop poor or critical Facility Condition Indexes (FCI).

DPS is not immune to this situation and as with many school districts, the recent economic downturn and recession caused more than typical maintenance needs to be deferred due to a lack of adequate funding, such as a referendum. Some of the deferred maintenance can be contributed to the gap between the 2007 and 2016 referenda and over the next ten years, DPS will be challenged to react to the pent-up maintenance demand, then move forward in a proactive manner.

In addition to the deferred, current, and future maintenance needs that must be addressed, DPS will also need to develop a plan for new educational spaces in terms of classroom additions and entire new facilities. Currently, DPS is in the process of designing a new high school to replace Northern High School and has a prototype design for a elementary school that is to be located in the southwest section of Durham but potentially, a second elementary school will be needed to address the concentrated student growth in the Sothern section of the county.

Viewing information in different ways often allows for specific and unique perspectives relative to receiving information in a single or summary manner. Although a summary is important, it is our belief that financial information should be broken down as follows:

1. Summary Sheets – Includes all costs (Deferred, Current, Future Maintenance, & New Construction). The summary sheets are broken into costs per facility, per year. The first page isolates the first five years of needs, which have a higher priority and the second page includes the trailing five years which is not as critical and sufficient time exists to allow a proactive approach to funding.
2. Construction Cost per Facility Type – Overall costs of the LRNA broken into school type.
3. Annual Construction Costs – Graphical delivery of the financial summary, in bar chart form, as well as breakdown on yearly cost per facility type (Elementary, Middle, High, Central Services).
4. Construction Needs Breakdown – Separation of all costs into major facility needs
 - a. New Construction
 - b. Renovation / Finishes
 - c. Site
 - d. Roofs
 - e. Food Service
 - f. Plumbing
 - g. HVAC
 - h. Electrical / Systems
 - i. Misc.
5. Current & Deferred Maintenance – Graphical delivery of the information, in pie chart form, for all maintenance related needs broken in facility type (Elementary, Middle, High, Central Services).

SUMMARY SHEET (2019-2024)

Durham Public Schools 2019 Long Range Facility Assessment				Annual Construction Cost per School				
	SCHOOL NAME	TOTAL PROJECT COST	2028 FCI	2019-20	2020-21	2021-22	2022-23	2023-24
Elementary Schools	Bethesda Elementary	\$8,828,521	0.34	\$5,000	\$205,970	\$655,697	\$1,686,456	\$0
	Burton Elementary	\$3,212,647	0.15	\$0	\$2,601,288	\$0	\$22,700	\$0
	C.C. Spaulding Elementary	\$4,688,978	0.22	\$1,966,444	\$224,741	\$21,800	\$478,013	\$23,600
	Club Boulevard Elementary	\$5,220,985	0.30	\$0	\$3,887,953	\$21,800	\$1,230,958	\$0
	Creekside Elementary	\$8,087,448	0.28	\$351,455	\$505,116	\$628,037	\$6,160,574	\$0
	E.K. Powe Elementary	\$10,481,720	0.35	\$67,500	\$1,312,672	\$8,561,237	\$0	\$0
	Easley Elementary	\$3,545,399	0.16	\$577,706	\$2,452,357	\$0	\$181,316	\$0
	Eastway Elementary	\$11,591,156	0.49	\$22,500	\$2,459,660	\$1,576,100	\$0	\$0
	Eno Valley Elementary	\$552,121	0.02	\$0	\$0	\$0	\$187,275	\$0
	Fayetteville Street Elementary	\$7,089,786	0.30	\$676,993	\$2,962,987	\$173,384	\$0	\$0
	Forest View Elementary	\$7,734,751	0.24	\$40,500	\$179,510	\$0	\$584,319	\$11,800
	George Watts Elementary	\$5,605,145	0.28	\$447,787	\$754,434	\$3,350,887	\$621,413	\$0
	Glenn Elementary	\$9,736,340	0.40	\$1,396,862	\$80,988	\$179,850	\$0	\$781,701
	Hillandale Elementary	\$6,346,314	0.24	\$3,500	\$49,638	\$0	\$0	\$0
	Holt Elementary	\$11,136,155	0.37	\$275,520	\$645,642	\$0	\$893,130	\$8,749,466
	Hope Valley Elementary	\$15,701,537	0.65	\$155,700	\$1,081,720	\$98,100	\$7,614,922	\$0
	Lakewood Elementary	\$6,175,957	0.34	\$171,660	\$272,804	\$0	\$251,284	\$0
	Little River Elementary	\$5,051,491	0.20	\$22,500	\$1,692,573	\$418,977	\$2,395,934	\$0
	Mangum Elementary	\$4,694,698	0.28	\$134,300	\$2,016,240	\$0	\$340,500	\$32,450
	Merrick-Moore Elementary	\$6,549,937	0.17	\$215,500	\$0	\$471,207	\$854,813	\$4,965,022
	Morehead Elementary	\$3,069,485	0.25	\$56,532	\$307,918	\$21,800	\$1,765,773	\$0
	Oak Grove Elementary	\$5,027,871	0.17	\$116,150	\$0	\$0	\$22,700	\$792,183
	Parkwood Elementary	\$4,905,301	0.20	\$625,941	\$20,900	\$366,404	\$2,261,597	\$96,170
	Pearson Elementary	\$13,958,263	0.42	\$1,144,813	\$6,582,713	\$272,500	\$5,194,729	\$0
	R.N. Harris Elementary	\$5,874,166	0.27	\$22,500	\$597,113	\$0	\$1,596,786	\$59,000
	Sandy Ridge Elementary	\$1,161,972	0.04	\$0	\$154,615	\$10,900	\$22,700	\$0
	Southwest Elementary	\$8,791,064	0.25	\$38,500	\$0	\$410,930	\$0	\$665,427
	Spring Valley Elementary	\$3,397,250	0.14	\$15,000	\$397,148	\$348,456	\$2,443,228	\$0
	W.G. Pearson Elementary	\$7,089,424	0.28	\$118,250	\$128,964	\$0	\$22,700	\$0
	Y.E. Smith Elementary	\$751,323	0.04	\$113,518	\$295,573	\$75,718	\$0	\$23,600
Scott King Road Elementary (School C)	\$37,385,089	n/a	\$0	\$3,029,852	\$0	\$0	\$34,355,237	
New Elementary "F" (Option Based)	\$49,204,055	n/a	\$0	\$0	\$0	\$4,021,237	\$0	
Middle Schools	Brogden Middle	\$18,264,457	0.38	\$1,394,245	\$8,016,762	\$8,252,325	\$363,200	\$0
	George L Carrington Middle	\$24,152,759	0.38	\$13,500	\$0	\$43,600	\$3,727,104	\$0
	James E Shepard Middle	\$7,403,153	0.25	\$0	\$2,610,468	\$1,131,958	\$0	\$690,171
	Lakewood Montessori Middle	\$897,652	0.04	\$0	\$20,000	\$20,900	\$214,640	\$0
	Lucas Middle	\$1,588,076	0.03	\$0	\$0	\$240,757	\$0	\$39,725
	Lowe's Grove Middle	\$7,448,756	0.20	\$1,117,927	\$3,415,248	\$696,244	\$1,679,025	\$297,950
	Neal Middle	\$8,025,702	0.16	\$0	\$48,500	\$763,215	\$3,411,840	\$3,091,647
	Sherwood Githens Middle	\$17,196,878	0.42	\$0	\$17,000	\$1,313,745	\$11,534,618	\$3,902,015
Rogers-Herr Middle	\$9,028,620	0.24	\$95,750	\$767,887	\$27,250	\$3,620,612	\$0	
High Schools	C.E. Jordan High School	\$46,556,010	0.57	\$3,711,854	\$7,959,450	\$25,589,174	\$2,531,123	\$1,705,100
	Hillside High School	\$42,827,651	0.37	\$70,000	\$5,129,451	\$54,500	\$1,509,550	\$29,500
	Northern High School		n/a					
	Riverside High School	\$30,093,201	0.35	\$312,000	\$11,635,729	\$0	\$9,420,642	\$1,587,100
	Southern High School	\$31,260,801	0.29	\$55,000	\$15,231,324	\$5,881,640	\$4,929,271	\$66,080
	Replacement HS - Northern Dist.	\$49,679,315	n/a	\$3,600,000	\$8,332,830	\$0	\$37,746,485	\$0
High / 6-12 Choice	School for Creative Studies	\$14,189,937	0.37	\$3,043,750	\$4,029,268	\$0	\$28,375	\$59,000
	J.D. Clement Early College	\$31,751	n/a	\$27,448	\$4,303	\$0	\$0	\$0
	City of Medicine Academy	\$2,198,646	0.18	\$5,000	\$63,514	\$169,261	\$1,695,211	\$191,250
	Durham Performance Learning Center	\$2,492,039	0.08	\$358,549	\$503,266	\$0	\$0	\$0
	Durham School of the Arts	\$80,593,979	0.75	\$38,500	\$16,682,808	\$0	\$28,869,234	\$0
	Middle College HS at DTCC	\$0	n/a	\$0	\$0	\$0	\$0	\$0
	Lakeview School	\$2,303,540	0.19	\$190,068	\$2,096,952	\$0	\$0	\$16,520
Central Services	Bacon Street Center	\$2,023,263	0.07	\$398,500	\$6,489	\$0	\$0	\$0
	Fuller Building	\$4,143,905	0.25	\$54,125	\$70,538	\$0	\$0	\$0
	Hamlin Road Operations	\$4,945,755	0.43	\$82,500	\$1,959,375	\$0	\$0	\$400,228
	Hamlin Road Central Service	\$4,606,548	0.34	\$15,000	\$342,999	\$0	\$4,248,549	\$0
	Staff Development Center	\$3,269,846	0.31	\$26,250	\$0	\$253,305	\$2,990,291	\$0
	Hub Farm	\$379,833	n/a	\$0	\$0	\$134,833	\$0	\$0
	Technology	\$28,914,959	n/a		\$21,740,624	\$0	\$0	\$7,174,335
Total Funds Required		\$727,163,380		\$23,392,595	\$145,585,872	\$62,236,492	\$159,374,825	\$69,806,277

SUMMARY SHEET (2024-2029)

Durham Public Schools 2019 Long Range Facility Assessment				Annual Construction Cost per School				
	SCHOOL NAME	TOTAL PROJECT COST	2028 FCI					
				2024-25	2025-26	2026-27	2027-28	2028-29
Elementary Schools	Bethesda Elementary	\$8,828,521	0.34	\$331,909	\$5,943,490	\$0	\$0	\$0
	Burton Elementary	\$3,212,647	0.15	\$0	\$0	\$0	\$187,616	\$401,043
	C.C. Spaulding Elementary	\$4,688,978	0.22	\$0	\$1,386,771	\$506,009	\$81,600	\$0
	Club Boulevard Elementary	\$5,220,985	0.30	\$73,500	\$0	\$6,775	\$0	\$0
	Creekside Elementary	\$8,087,448	0.28	\$189,826	\$0	\$0	\$0	\$252,441
	E.K. Powe Elementary	\$10,481,720	0.35	\$0	\$0	\$540,310	\$0	\$0
	Easley Elementary	\$3,545,399	0.16	\$226,071	\$107,950	\$0	\$0	\$0
	Eastway Elementary	\$11,591,156	0.49	\$0	\$7,532,896	\$0	\$0	\$0
	Eno Valley Elementary	\$552,121	0.02	\$0	\$44,936	\$255,280	\$0	\$64,630
	Fayetteville Street Elementary	\$7,089,786	0.30	\$257,796	\$0	\$0	\$0	\$3,018,627
	Forest View Elementary	\$7,734,751	0.24	\$0	\$6,451,381	\$0	\$467,242	\$0
	George Watts Elementary	\$5,605,145	0.28	\$0	\$334,472	\$0	\$96,152	\$0
	Glenn Elementary	\$9,736,340	0.40	\$7,063,611	\$178,533	\$0	\$0	\$54,795
	Hillandale Elementary	\$6,346,314	0.24	\$492,958	\$5,628,193	\$52,600	\$0	\$119,425
	Holt Elementary	\$11,136,155	0.37	\$73,500	\$498,897	\$0	\$0	\$0
	Hope Valley Elementary	\$15,701,537	0.65	\$0	\$0	\$0	\$183,490	\$6,567,605
	Lakewood Elementary	\$6,175,957	0.34	\$73,500	\$481,550	\$237,741	\$4,687,417	\$0
	Little River Elementary	\$5,051,491	0.20	\$73,500	\$0	\$382,481	\$65,526	\$0
	Mangum Elementary	\$4,694,698	0.28	\$1,737,331	\$240,767	\$111,775	\$50,320	\$31,016
	Merrick-Moore Elementary	\$6,549,937	0.17	\$0	\$0	\$43,395	\$0	\$0
	Morehead Elementary	\$3,069,485	0.25	\$0	\$0	\$840,962	\$76,500	\$0
	Oak Grove Elementary	\$5,027,871	0.17	\$0	\$391,740	\$0	\$3,705,098	\$0
	Parkwood Elementary	\$4,905,301	0.20	\$0	\$0	\$28,930	\$1,505,360	\$0
	Pearsontown Elementary	\$13,958,263	0.42	\$0	\$107,950	\$570,557	\$85,000	\$0
	R.N. Harris Elementary	\$5,874,166	0.27	\$481,969	\$3,116,798	\$0	\$0	\$0
	Sandy Ridge Elementary	\$1,161,972	0.04	\$91,822	\$610,555	\$0	\$271,380	\$0
	Southwest Elementary	\$8,791,064	0.25	\$0	\$7,621,398	\$0	\$54,808	\$0
	Spring Valley Elementary	\$3,397,250	0.14	\$0	\$0	\$24,985	\$0	\$168,434
	W.G. Pearson Elementary	\$7,089,424	0.28	\$0	\$556,811	\$6,178,399	\$0	\$84,300
	Y.E. Smith Elementary	\$751,323	0.04	\$0	\$6,350	\$60,490	\$176,074	\$0
Scott King Road Elementary (School C)	\$37,385,089	n/a	\$0	\$0	\$0	\$0	\$0	
New Elementary "F" (Option Based)	\$49,204,055	n/a	\$0	\$45,182,819	\$0	\$0	\$0	
Middle Schools	Brogden Middle	\$18,264,457	0.38	\$91,875	\$146,050	\$0	\$0	\$0
	George L Carrington Middle	\$24,152,759	0.38	\$15,074,587	\$224,324	\$0	\$353,267	\$4,716,377
	James E Shepard Middle	\$7,403,153	0.25	\$2,703,893	\$260,313	\$6,350	\$0	\$0
	Lakewood Montessori Middle	\$897,652	0.04	\$0	\$128,720	\$0	\$513,392	\$0
	Lucas Middle	\$1,588,076	0.03	\$142,929	\$1,120,957	\$0	\$0	\$43,707
	Lowe's Grove Middle	\$7,448,756	0.20	\$0	\$0	\$0	\$0	\$242,363
	Neal Middle	\$8,025,702	0.16	\$0	\$710,500	\$0	\$0	\$0
	Sherwood Githens Middle	\$17,196,878	0.42	\$321,550	\$0	\$107,950	\$0	\$0
Rogers-Herr Middle	\$9,028,620	0.24	\$0	\$4,397,695	\$0	\$0	\$119,425	
High Schools	C.E. Jordan High School	\$46,556,010	0.57	\$0	\$0	\$3,609,675	\$1,449,635	\$0
	Hillside High School	\$42,827,651	0.37	\$3,415,319	\$29,138,165	\$1,546,140	\$1,815,600	\$119,425
	Northern High School		n/a					
	Riverside High School	\$30,093,201	0.35	\$91,875	\$7,011,855	\$0	\$34,000	\$0
	Southern High School	\$31,260,801	0.29	\$104,125	\$3,251,200	\$0	\$1,742,160	\$0
	Replacement HS - Northern Dist.	\$49,679,315	n/a	\$0	\$0	\$0	\$0	\$0
High / 6-12 Choice	School for Creative Studies	\$14,189,937	0.37	\$0	\$7,029,544	\$0	\$0	\$0
	J.D. Clement Early College	\$31,751	n/a	\$0	\$0	\$0	\$0	\$0
	City of Medicine Academy	\$2,198,646	0.18	\$0	\$0	\$74,410	\$0	\$0
	Durham Performance Learning Center	\$2,492,039	0.08	\$98,613	\$1,531,612	\$0	\$0	\$0
	Durham School of the Arts	\$80,593,979	0.75	\$15,893,763	\$0	\$17,686,058	\$0	\$1,423,616
	Middle College HS at DTCC	\$0	n/a	\$0	\$0	\$0	\$0	\$0
	Lakeview School	\$2,303,540	0.19	\$0	\$0	\$0	\$0	\$0
Central Services	Bacon Street Center	\$2,023,263	0.07	\$165,669	\$1,452,605	\$0	\$0	\$0
	Fuller Building	\$4,143,905	0.25	\$315,697	\$474,576	\$3,228,970	\$0	\$0
	Hamlin Road Operations	\$4,945,755	0.43	\$0	\$2,306,403	\$197,250	\$0	\$0
	Hamlin Road Central Service	\$4,606,548	0.34	\$0	\$0	\$0	\$0	\$0
	Staff Development Center	\$3,269,846	0.31	\$0	\$0	\$0	\$0	\$0
	Hub Farm	\$379,833	n/a	\$245,000	\$0	\$0	\$0	\$0
	Technology	\$28,914,959	n/a	\$0	\$0	\$0	\$0	\$0
Total Funds Required		\$727,163,380		\$49,832,185	\$145,608,774	\$36,297,495	\$17,601,637	\$17,427,229

CONSTRUCTION COSTS SUBTOTALS

Elementary Schools.....\$282,646,349

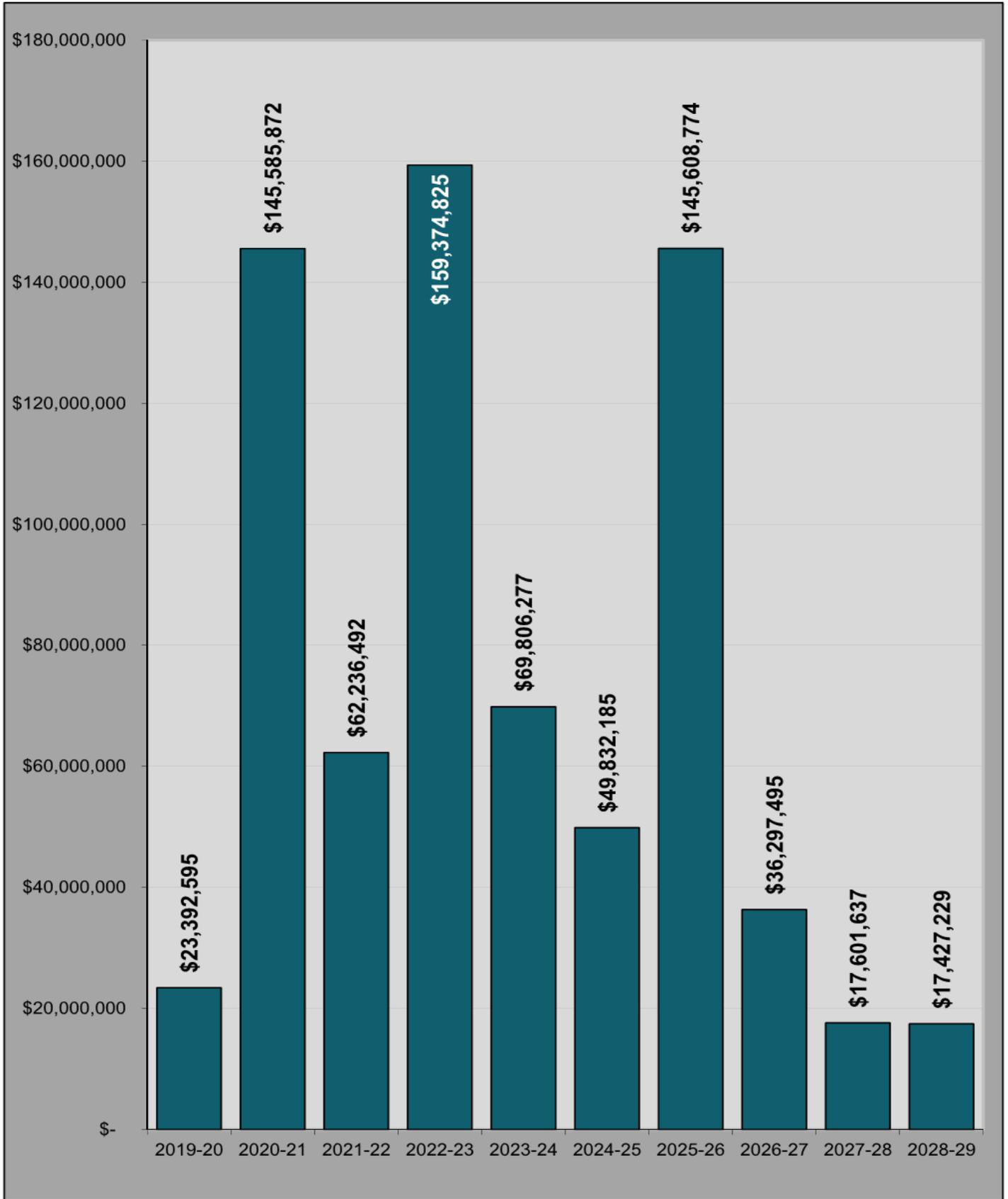
Middle Schools.....\$94,006,052

High Schools.....\$302,226,870

Central Services.....\$48,284,109

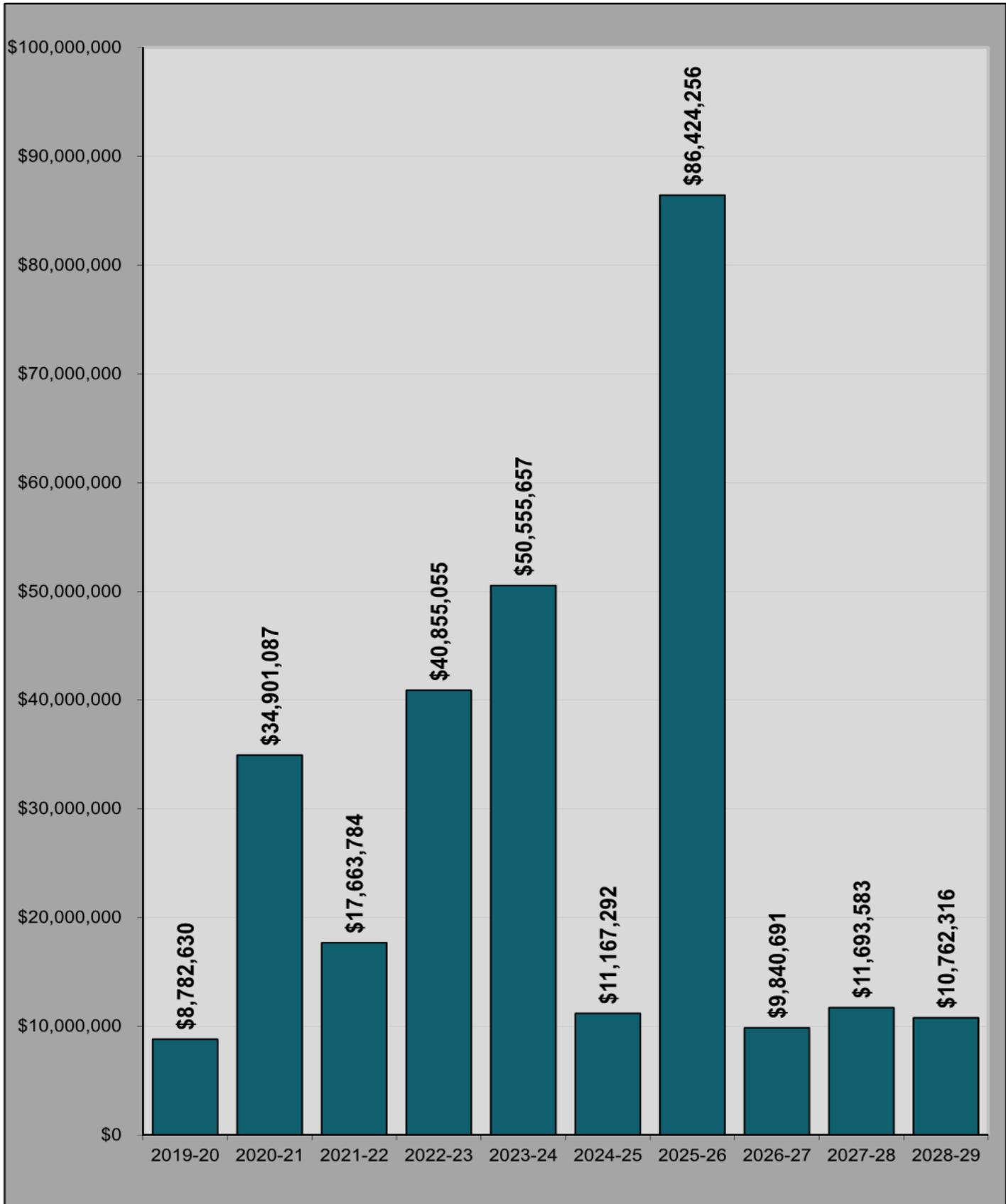
Total Construction Costs.....\$727,163,380

ANNUAL CONSTRUCTION COSTS



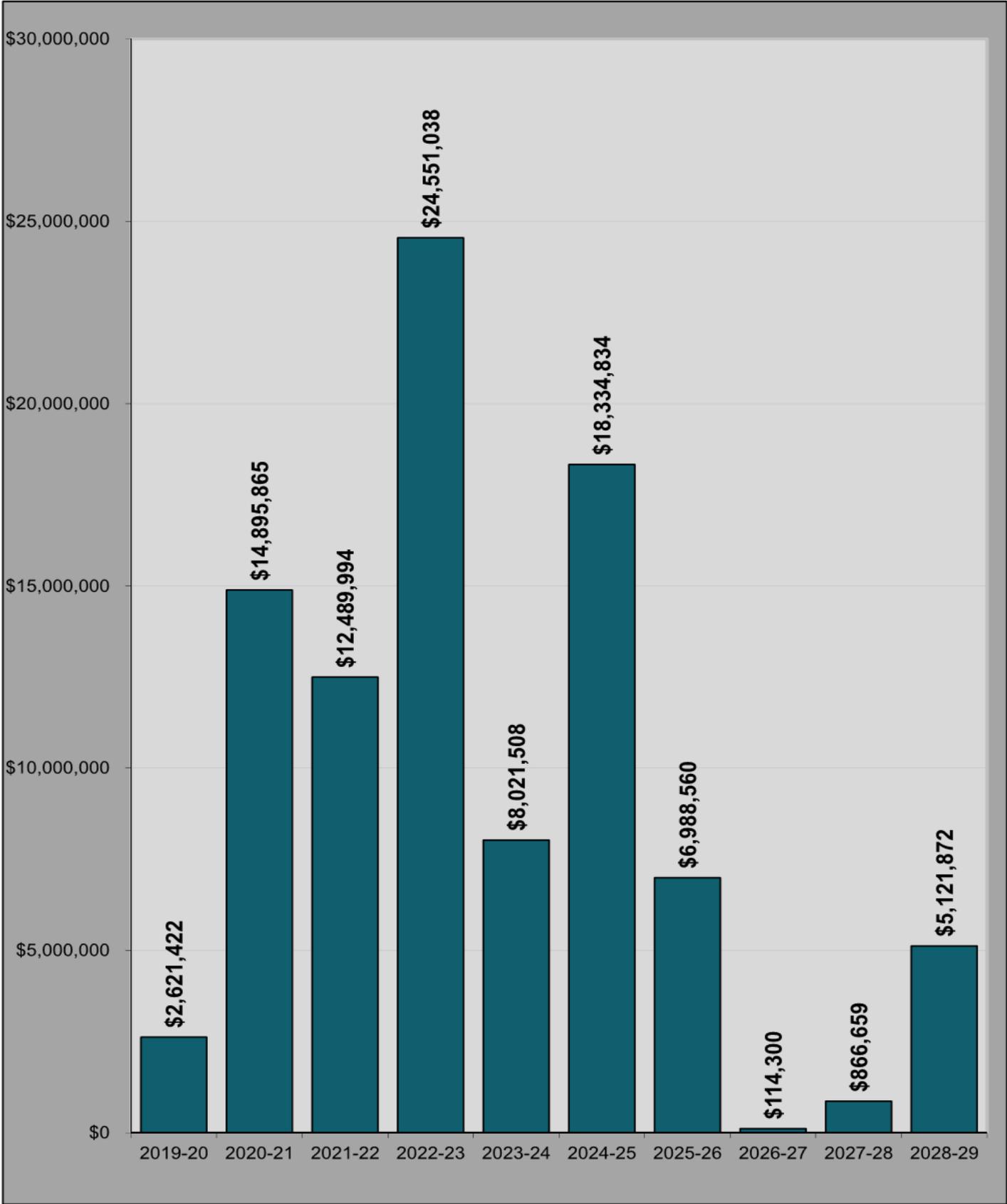
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ELEMENTARY ANNUAL COSTS



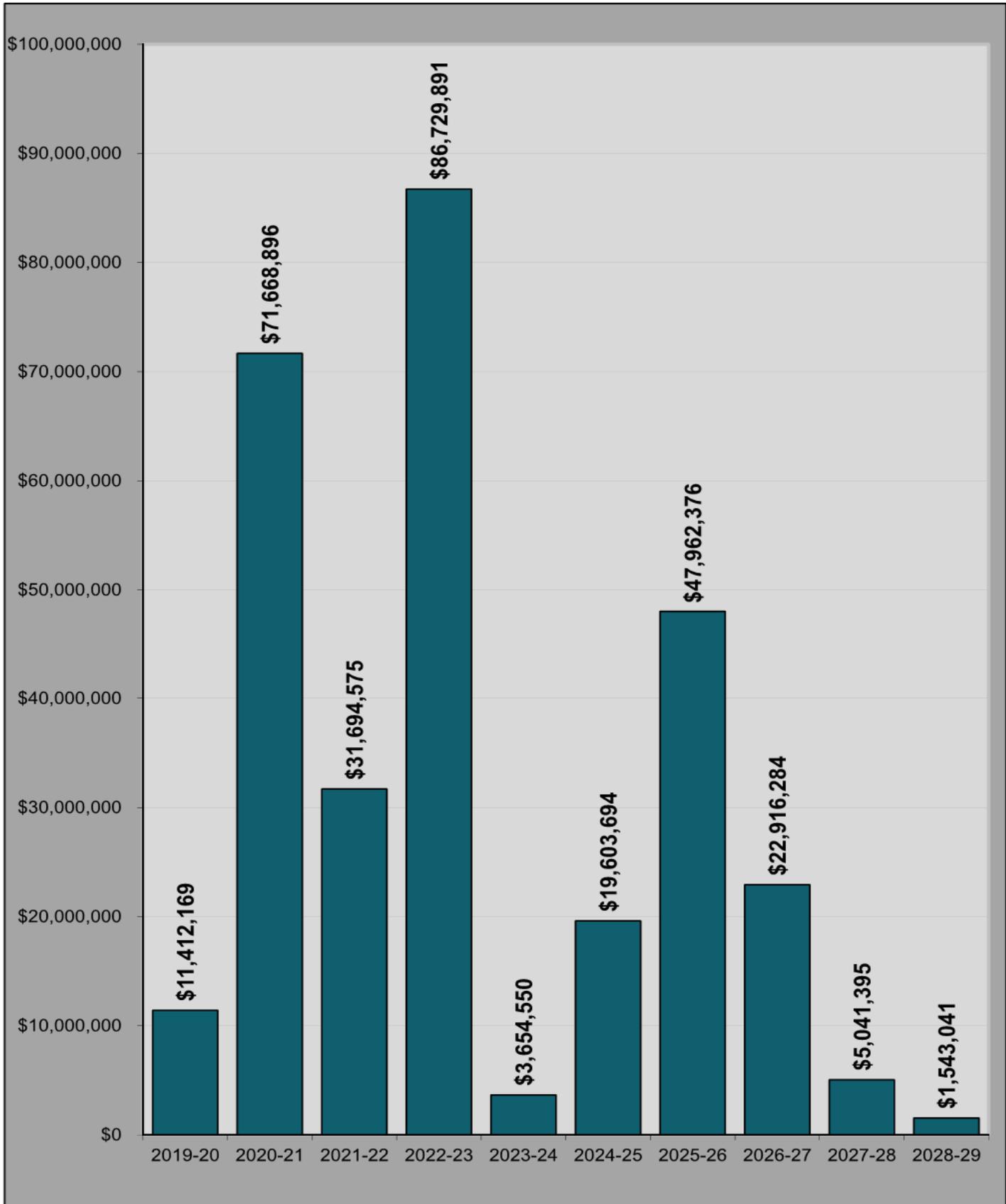
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MIDDLE ANNUAL COSTS



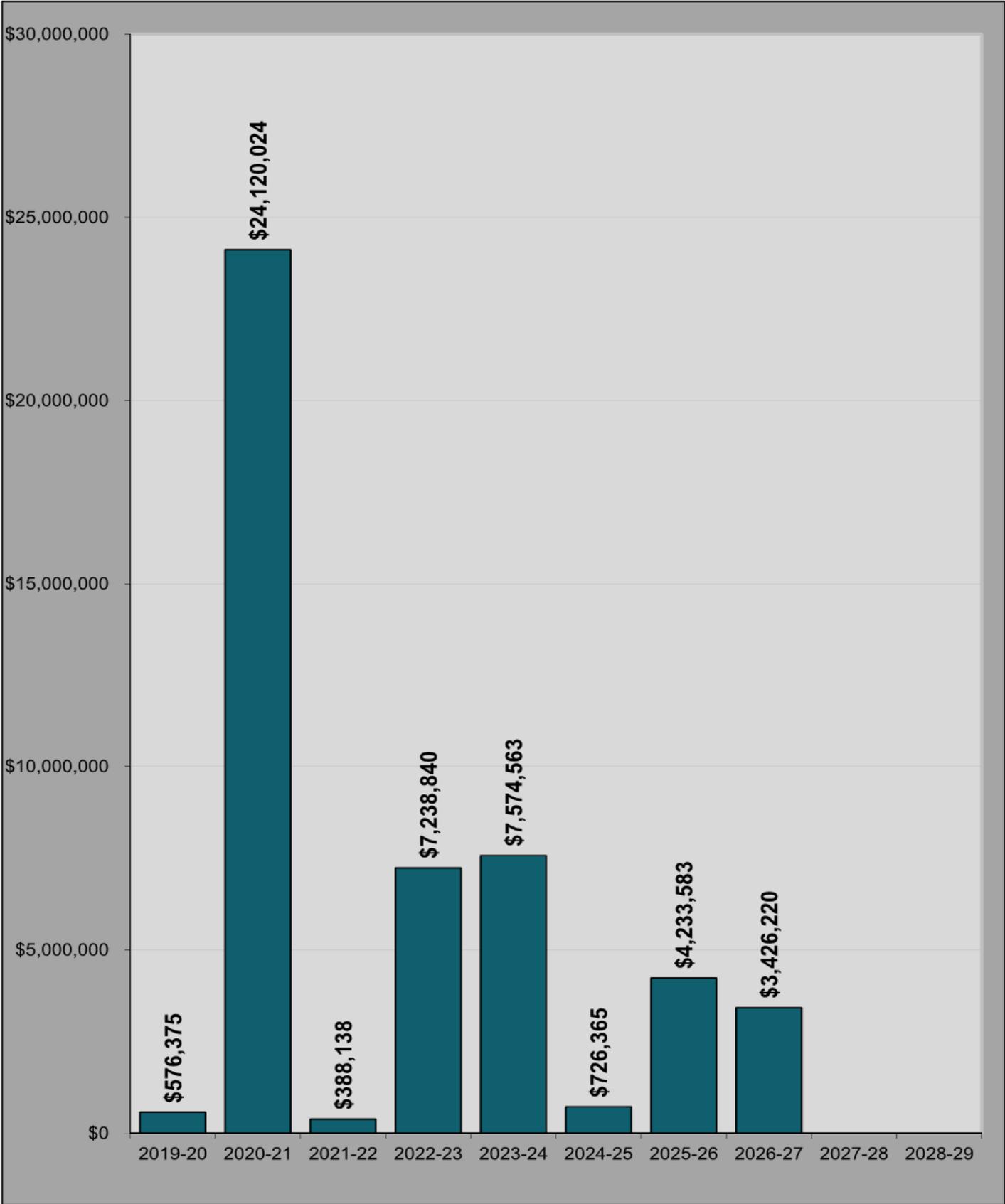
\$94,006,052

HIGH / 6-12 CHOICE ANNUAL COSTS



\$302,226,870

CENTRAL SERVICES ANNUAL COSTS



\$48,284,109

BREAKDOWN OF CONSTRUCTION NEEDS

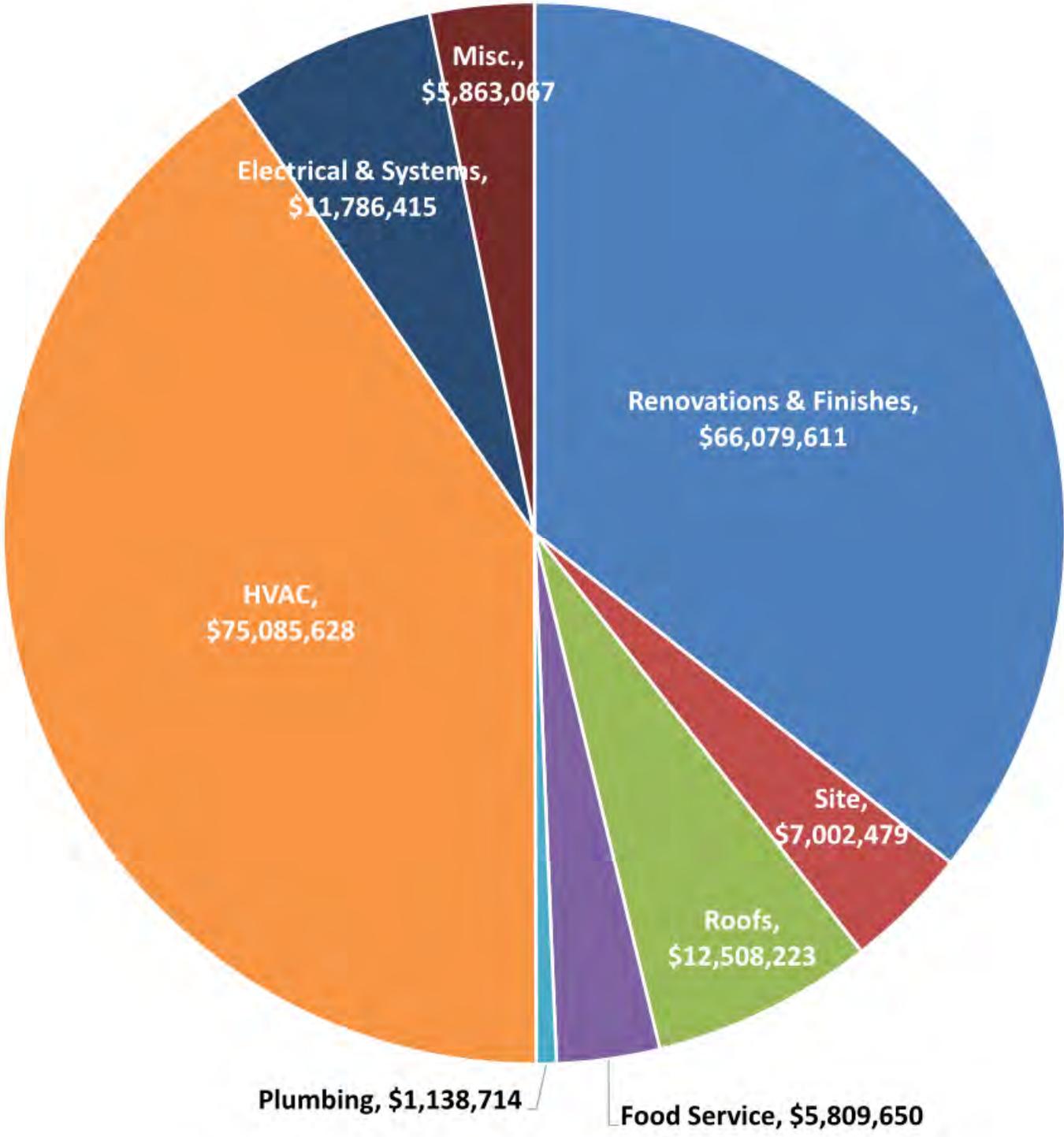
Durham Public Schools - 2019 Long Range Facility Assessment

Campus	Total Facility Needs	New Capital Projects, Deferred and Current Maintenance Needs					
		New Construction	Renovations & Finishes	Site	Roofs	Food Service	
Elementary Schools	Bethesda Elementary	\$8,828,521	\$1,814,700	\$3,794,481	\$282,459	\$0	\$113,625
	Burton Elementary	\$3,212,647	\$56,760	\$662,286	\$261,870	\$0	\$136,425
	C.C. Spaulding Elementary	\$4,688,978	\$0	\$1,288,495	\$198,441	\$391,539	\$439,275
	Club Boulevard Elementary	\$5,220,985	\$710,700	\$1,515,671	\$148,350	\$8,037	\$432,150
	Creekside Elementary	\$8,087,448	\$0	\$3,572,592	\$76,304	\$227,791	\$485,250
	E.K. Powe Elementary	\$10,481,720	\$0	\$1,656,461	\$232,688	\$1,204,522	\$260,325
	Easley Elementary	\$3,545,399	\$0	\$351,025	\$432,563	\$0	\$128,775
	Eastway Elementary	\$11,591,156	\$0	\$3,196,080	\$396,488	\$1,874,780	\$507,525
	Eno Valley Elementary	\$552,121	\$0	\$266,607	\$216,600	\$0	\$0
	Fayetteville Street Elementary	\$7,089,786	\$0	\$3,363,550	\$323,700	\$809,256	\$0
	Forest View Elementary	\$7,734,751	\$0	\$3,539,169	\$94,973	\$0	\$507,525
	George Watts Elementary	\$5,605,145	\$757,988	\$2,409,390	\$173,600	\$0	\$0
	Glenn Elementary	\$9,736,340	\$0	\$3,874,322	\$373,950	\$1,739,093	\$492,450
	Hillandale Elementary	\$6,346,314	\$0	\$3,557,350	\$59,483	\$0	\$140,250
	Holt Elementary	\$11,136,155	\$0	\$4,004,255	\$414,921	\$0	\$0
	Hope Valley Elementary	\$15,701,537	\$2,366,700	\$3,204,768	\$294,197	\$1,697,673	\$103,500
	Lakewood Elementary	\$6,175,957	\$0	\$3,282,633	\$167,595	\$0	\$0
	Little River Elementary	\$5,051,491	\$70,950	\$289,643	\$142,624	\$1,935,241	\$0
	Mangum Elementary	\$4,694,698	\$414,000	\$987,662	\$227,834	\$383,534	\$493,800
	Merrick-Moore Elementary	\$6,549,937	\$414,000	\$4,258,317	\$244,298	\$0	\$121,125
	Morehead Elementary	\$3,069,485	\$933,570	\$327,342	\$173,100	\$865,043	\$477,600
	Oak Grove Elementary	\$5,027,871	\$0	\$559,885	\$298,613	\$80,869	\$0
	Parkwood Elementary	\$4,905,301	\$0	\$1,977,506	\$90,938	\$0	\$0
	Pearsontown Elementary	\$13,958,263	\$710,700	\$4,131,445	\$159,863	\$1,259,719	\$462,525
	R.N. Harris Elementary	\$5,874,166	\$0	\$2,131,262	\$737,444	\$0	\$0
	Sandy Ridge Elementary	\$1,161,972	\$0	\$190,865	\$13,350	\$0	\$0
	Southwest Elementary	\$8,791,064	\$166,650	\$3,773,873	\$518,430	\$0	\$507,525
	Spring Valley Elementary	\$3,397,250	\$2,366,700	\$160,872	\$129,723	\$0	\$0
	W.G. Pearson Elementary	\$7,089,424	\$0	\$3,562,770	\$66,938	\$0	\$0
	Y.E. Smith Elementary	\$751,323	\$0	\$189,038	\$51,150	\$31,125	\$0
Scott King Road Elementary (School C)	\$37,385,089	\$37,385,089	\$0	\$0	\$0	\$0	
New Elementary "F" (Option Based)	\$49,204,055	\$49,204,055	\$0	\$0	\$0	\$0	
Middle Schools	Brogden Middle	\$18,264,457	\$441,600	\$6,042,787	\$790,830	\$1,712,803	\$462,525
	George L Carrington Middle	\$24,152,759	\$441,600	\$9,189,980	\$802,260	\$5,538,806	\$492,450
	James E Shepard Middle	\$7,403,153	\$22,080	\$1,706,217	\$362,970	\$3,242,495	\$447,450
	Lakewood Montessori Middle	\$897,652	\$0	\$173,934	\$120,150	\$0	\$0
	Lucas Middle	\$1,588,076	\$0	\$326,602	\$245,325	\$0	\$0
	Lowe's Grove Middle	\$7,448,756	\$1,676,700	\$1,152,814	\$120,150	\$0	\$0
	Neal Middle	\$8,025,702	\$1,262,700	\$1,159,040	\$873,768	\$0	\$0
	Sherwood Githens Middle	\$17,196,878	\$2,228,700	\$5,022,622	\$454,630	\$0	\$462,525
	Rogers-Herr Middle	\$9,028,620	\$22,080	\$1,490,412	\$549,540	\$1,782,099	\$519,000
High Schools	C.E. Jordan High School	\$46,556,010	\$4,825,575	\$20,380,832	\$2,726,715	\$3,077,488	\$0
	Hillside High School	\$42,827,651	\$7,962,150	\$13,884,187	\$3,297,902	\$4,446,586	\$519,000
	Northern High School	\$0	\$0	\$0	\$0	\$0	\$0
	Riverside High School	\$30,093,201	\$3,507,225	\$11,891,078	\$2,352,399	\$215,906	\$451,275
	Southern High School	\$31,260,801	\$1,757,700	\$10,987,770	\$2,778,825	\$3,722,887	\$447,450
	Replacement HS - Northern Dist.	\$49,679,315	\$49,679,315				
High / 6-12 Choice	School for Creative Studies	\$14,189,937	\$0	\$5,845,362	\$201,338	\$3,185,577	\$451,275
	J.D. Clement Early College	\$31,751	\$0	\$0	\$0	\$0	\$0
	City of Medicine Academy	\$2,198,646	\$1,814,700	\$78,404	\$6,225	\$0	\$0
	Durham Performance Learning Center	\$2,492,039	\$0	\$383,343	\$12,450	\$210,482	\$0
	Durham School of the Arts	\$80,593,979	\$40,868,393	\$14,441,083	\$1,735,359	\$3,412,283	\$0
	Middle College HS at DTCC	\$0	\$0	\$0	\$0	\$0	\$0
	Lakeview School	\$2,303,540	\$6,225	\$1,156,038	\$129,000	\$0	\$0
Other	Bacon Street Center	\$2,023,263	\$0	\$972,888	\$16,808	\$8,011	\$227,250
	Fuller Building	\$4,143,905	\$0	\$2,299,058	\$46,283	\$0	\$0
	Hamlin Road Operations	\$4,945,755	\$1,983,300	\$1,088,982	\$798,900	\$0	\$0
	Hamlin Road Central Service	\$4,606,548	\$2,228,700	\$862,174	\$768,660	\$0	\$0
	Staff Development Center	\$3,269,846	\$0	\$1,883,958	\$153,930	\$0	\$0
	Hub Farm	\$379,833	\$374,100	\$0	\$0	\$0	\$0
	Technology	\$28,914,959	\$0	\$0	\$0	\$0	\$0
Funds Needed Totals	\$ 727,163,380	\$ 218,475,405	\$ 178,499,174	\$ 26,346,894	\$ 43,063,644	\$ 10,289,850	

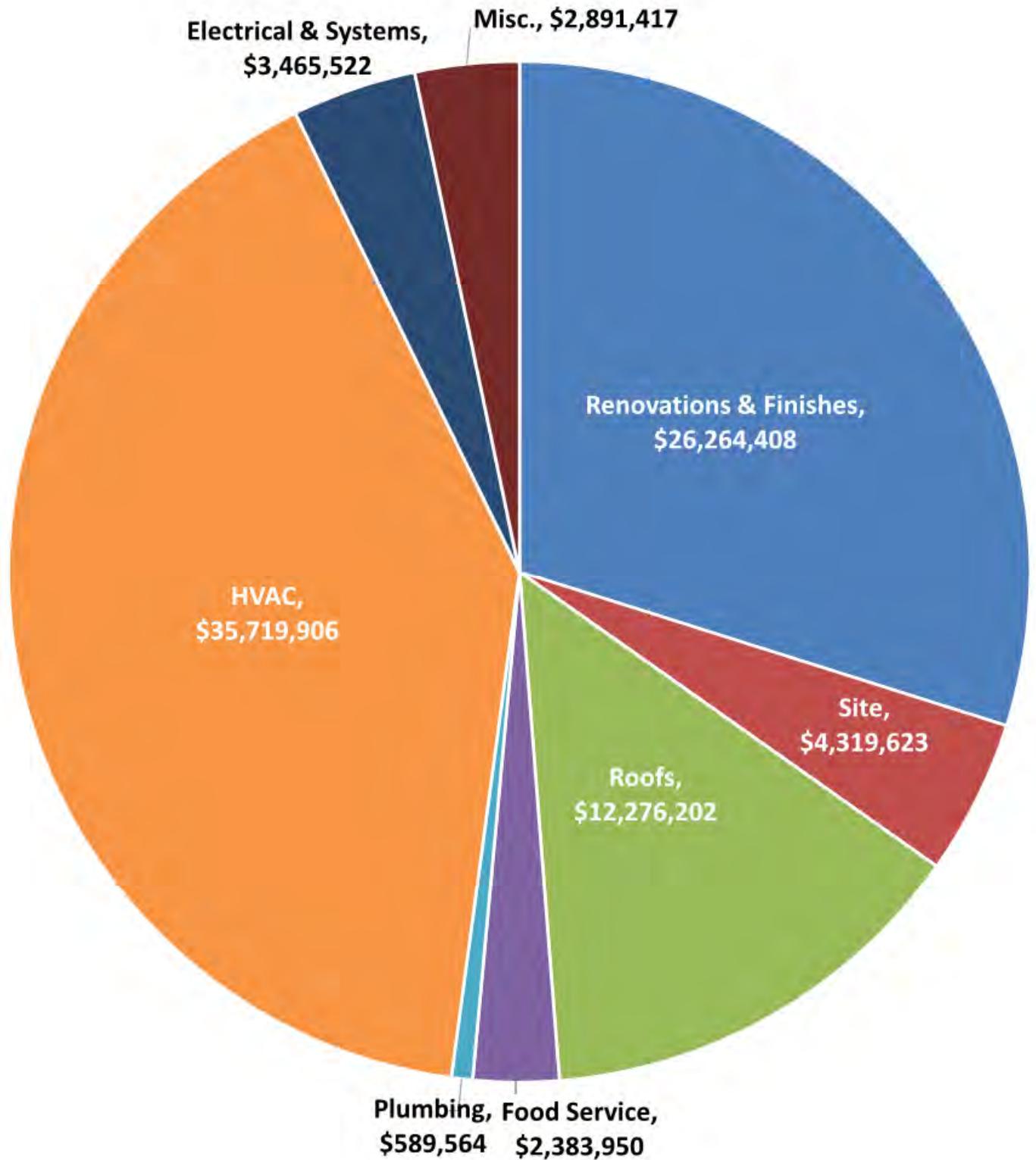
Durham Public Schools - 2019 Long Range Facility Assessment

Campus	New Capital Projects, Deferred and Current Maintenance Needs					Total By Grade Level
	Plumbing	HVAC	Electrical & Systems	Misc.	Total Deferred Maintenance	
Elementary Schools	Bethesda Elementary	\$54,540	\$2,047,805	\$424,991	\$295,920	\$7,013,821
	Burton Elementary	\$12,900	\$1,943,846	\$112,590	\$25,970	\$3,155,887
	C.C. Spaulding Elementary	\$28,500	\$1,730,201	\$515,090	\$97,436	\$4,688,978
	Club Boulevard Elementary	\$16,770	\$1,890,105	\$404,638	\$94,564	\$4,510,285
	Creekside Elementary	\$0	\$3,053,204	\$507,664	\$164,644	\$8,087,448
	E.K. Powe Elementary	\$24,900	\$5,073,056	\$1,260,873	\$768,895	\$10,481,720
	Easley Elementary	\$83,850	\$1,973,900	\$557,710	\$17,577	\$3,545,399
	Eastway Elementary	\$34,845	\$4,963,140	\$480,807	\$137,491	\$11,591,156
	Eno Valley Elementary	\$0	\$0	\$43,200	\$25,714	\$552,121
	Fayetteville Street Elementary	\$12,900	\$1,903,691	\$448,915	\$227,774	\$7,089,786
	Forest View Elementary	\$0	\$3,050,169	\$282,394	\$260,522	\$7,734,751
	George Watts Elementary	\$48,150	\$1,893,258	\$284,865	\$37,895	\$4,847,158
	Glenn Elementary	\$26,580	\$2,775,000	\$119,576	\$335,370	\$9,736,340
	Hillandale Elementary	\$30,345	\$2,212,097	\$98,700	\$248,089	\$6,346,314
	Holt Elementary	\$45,600	\$5,359,063	\$737,724	\$574,592	\$11,136,155
	Hope Valley Elementary	\$0	\$7,712,846	\$74,347	\$247,506	\$13,334,837
	Lakewood Elementary	\$32,100	\$1,947,130	\$425,494	\$321,005	\$6,175,957
	Little River Elementary	\$4,140	\$2,237,671	\$260,649	\$110,572	\$4,980,541
	Mangum Elementary	\$45,150	\$1,692,849	\$413,181	\$36,689	\$4,280,698
	Merrick-Moore Elementary	\$5,700	\$550,421	\$745,509	\$210,568	\$6,135,937
	Morehead Elementary	\$15,668	\$4,358	\$203,188	\$69,616	\$2,135,915
	Oak Grove Elementary	\$28,500	\$3,505,674	\$303,807	\$250,523	\$5,027,871
	Parkwood Elementary	\$28,500	\$2,465,580	\$240,498	\$102,280	\$4,905,301
	Pearson Elementary	\$0	\$6,273,963	\$751,524	\$208,525	\$13,247,563
	R.N. Harris Elementary	\$451,737	\$1,947,692	\$363,474	\$242,558	\$5,874,166
	Sandy Ridge Elementary	\$0	\$597,746	\$311,776	\$48,235	\$1,161,972
Southwest Elementary	\$32,040	\$3,176,819	\$293,447	\$322,281	\$8,624,414	
Spring Valley Elementary	\$0	\$426,778	\$255,044	\$58,133	\$1,030,550	
W.G. Pearson Elementary	\$46,800	\$2,438,601	\$655,684	\$318,632	\$7,089,424	
Y.E. Smith Elementary	\$28,500	\$238,965	\$209,054	\$3,492	\$751,323	
Scott King Road Elementary (School C)	\$0	\$0	\$0	\$0	\$0	
New Elementary "F" (Option Based)	\$0	\$0	\$0	\$0	\$0	
Middle Schools	Brogden Middle	\$26,700	\$8,119,641	\$413,850	\$253,722	\$17,822,857
	George L Carrington Middle	\$427,932	\$5,423,684	\$1,113,925	\$722,122	\$23,711,159
	James E Shepard Middle	\$28,013	\$1,206,147	\$336,525	\$51,257	\$7,381,073
	Lakewood Montessori Middle	\$12,450	\$444,775	\$93,788	\$52,556	\$897,652
	Lucas Middle	\$0	\$903,127	\$54,450	\$58,571	\$1,588,076
	Lowe's Grove Middle	\$26,700	\$3,160,603	\$379,231	\$932,558	\$5,772,056
	Neal Middle	\$33,375	\$4,151,731	\$368,260	\$176,828	\$6,763,002
	Sherwood Githens Middle	\$14,370	\$8,106,224	\$585,118	\$322,689	\$14,968,178
Rogers-Herr Middle	\$20,025	\$4,203,975	\$120,375	\$321,114	\$9,006,540	
High Schools	C.E. Jordan High School	\$109,650	\$13,450,427	\$1,763,678	\$221,645	\$41,730,435
	Hillside High School	\$48,525	\$9,186,633	\$1,757,632	\$1,725,036	\$34,865,501
	Northern High School	\$0	\$0	\$0	\$0	\$0
	Riverside High School	\$14,700	\$8,392,011	\$1,817,680	\$1,450,927	\$26,585,976
	Southern High School	\$80,250	\$9,026,940	\$1,684,988	\$773,991	\$29,503,101
	Replacement HS - Northern Dist.				\$0	\$0
High / 6-12 Choice	School for Creative Studies	\$190,485	\$3,557,899	\$571,826	\$186,176	\$14,189,937
	J.D. Clement Early College	\$0	\$0	\$31,566	\$185	\$31,751
	City of Medicine Academy	\$0	\$230,958	\$15,600	\$52,758	\$383,946
	Durham Performance Learning Center	\$0	\$1,827,080	\$47,539	\$11,146	\$2,492,039
	Durham School of the Arts	\$3,561,677	\$11,476,515	\$1,320,918	\$3,777,753	\$39,725,587
	Middle College HS at DTCC	\$0	\$0	\$0	\$0	\$0
Lakeview School	\$4,980	\$683,696	\$312,015	\$11,586	\$2,297,315	
Other	Bacon Street Center	\$0	\$441,975	\$272,957	\$83,375	\$2,023,263
	Fuller Building	\$0	\$1,108,712	\$530,973	\$158,879	\$4,143,905
	Hamlin Road Operations	\$0	\$103,200	\$726,735	\$244,639	\$2,962,455
	Hamlin Road Central Service	\$0	\$193,200	\$454,093	\$99,721	\$2,377,848
	Staff Development Center	\$0	\$895,518	\$235,880	\$100,560	\$3,269,846
	Hub Farm	\$0	\$0	\$0	\$5,733	\$5,733
Technology	\$0	\$0	\$28,914,959	\$0	\$28,914,959	
Funds Needed Totals	\$ 5,738,545	\$ 171,380,297	\$ 55,710,976	\$ 17,658,595	\$ 508,687,976	\$ 727,163,380

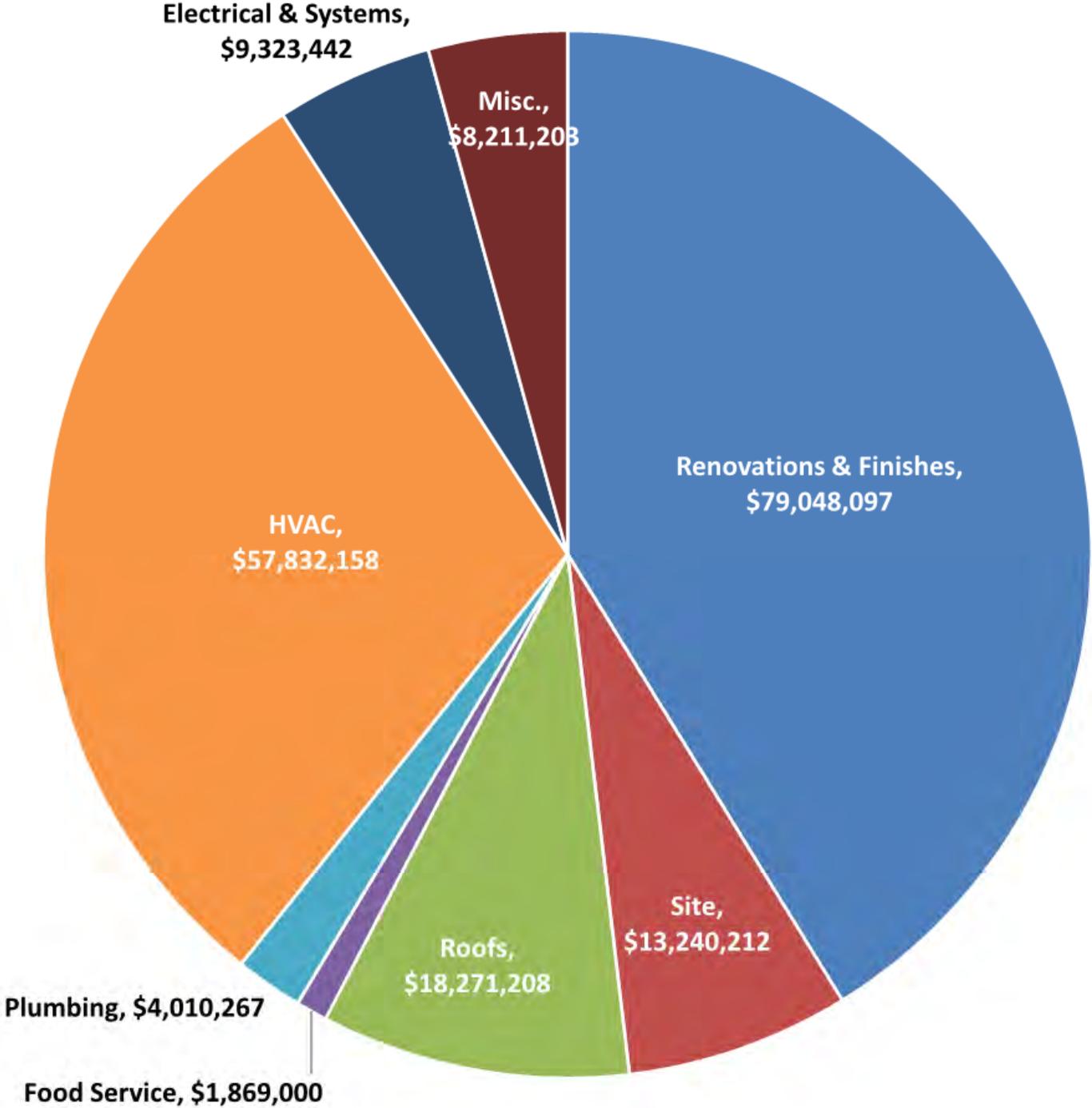
ES - CURRENT & DEFERRED MAINTENANCE



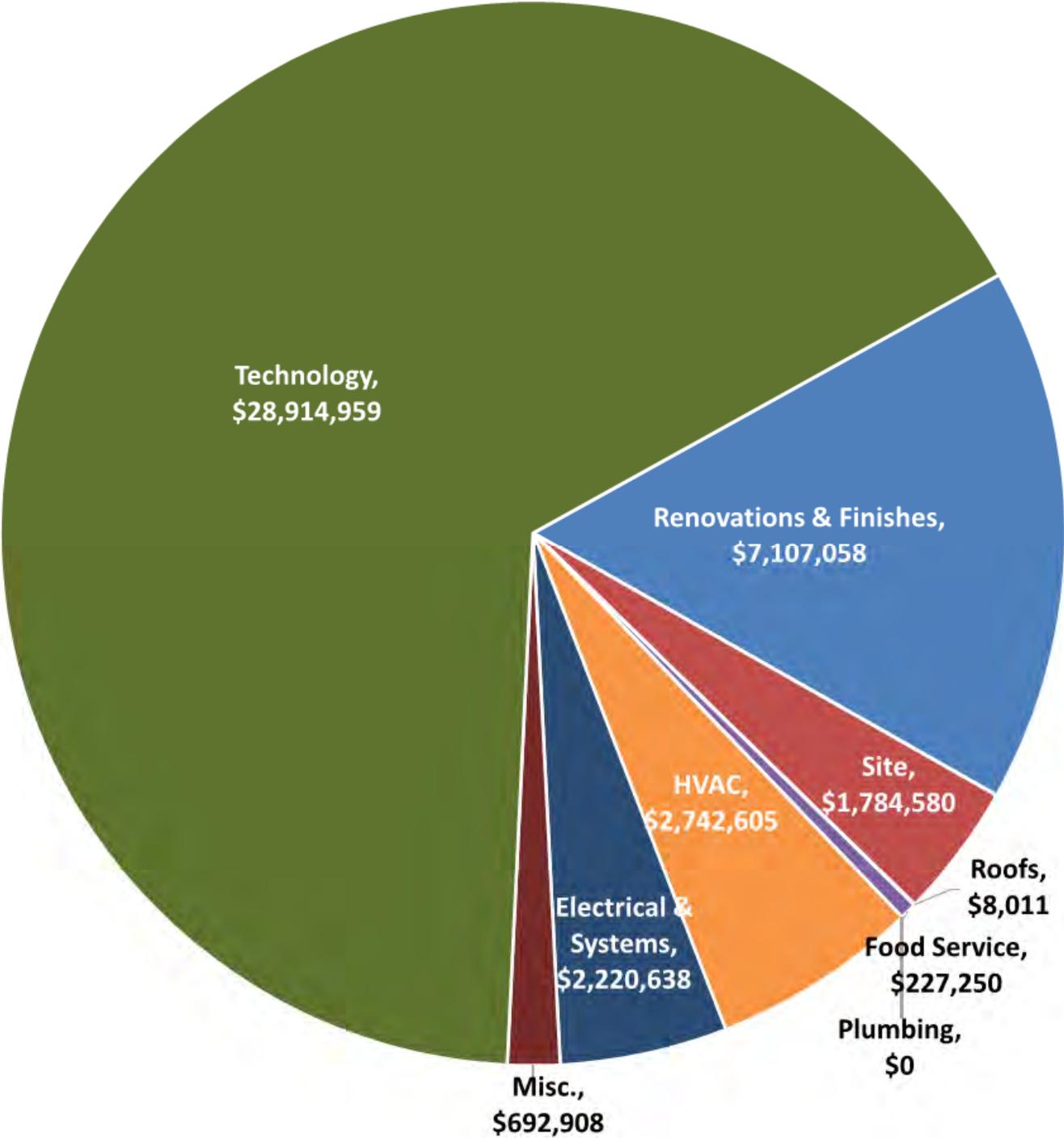
MS - CURRENT & DEFERRED MAINTENANCE



HS / 6-12 CHOICE - CURRENT & DEFERRED MAINTENANCE



CS - CURRENT & DEFERRED MAINTENANCE





DURHAM

PUBLIC SCHOOLS

TIMELINE ANALYSIS FOR PROJECTS

Large-scale capital improvements such as brand new

schools, expansions, and significant renovations are not only big investments in dollars but investments in time as well. A great deal of planning, design and management is required to see each project through from the moment the funds are available to the day the projects are completed, turned over to the District, furnished, and occupied. For the purpose of this discussion, the timeline of building new schools and additions to existing schools will be the focus.

The phases of a new project generally include – identifying the need, size, and location of a facility, identifying and procuring property suitable for the needed facility, development of a budget for the facility, selection of a design team, developing a design, acquiring government approvals, the bidding and contracting process, and the construction period. There are numerous subdivisions and overlaps of these activities as well and the day-to-day breakdown of a project schedule is a study in endless details, which if done correctly, is never seen by the public. Attached is a draft schedule for the new schools along with any additions to existing schools.

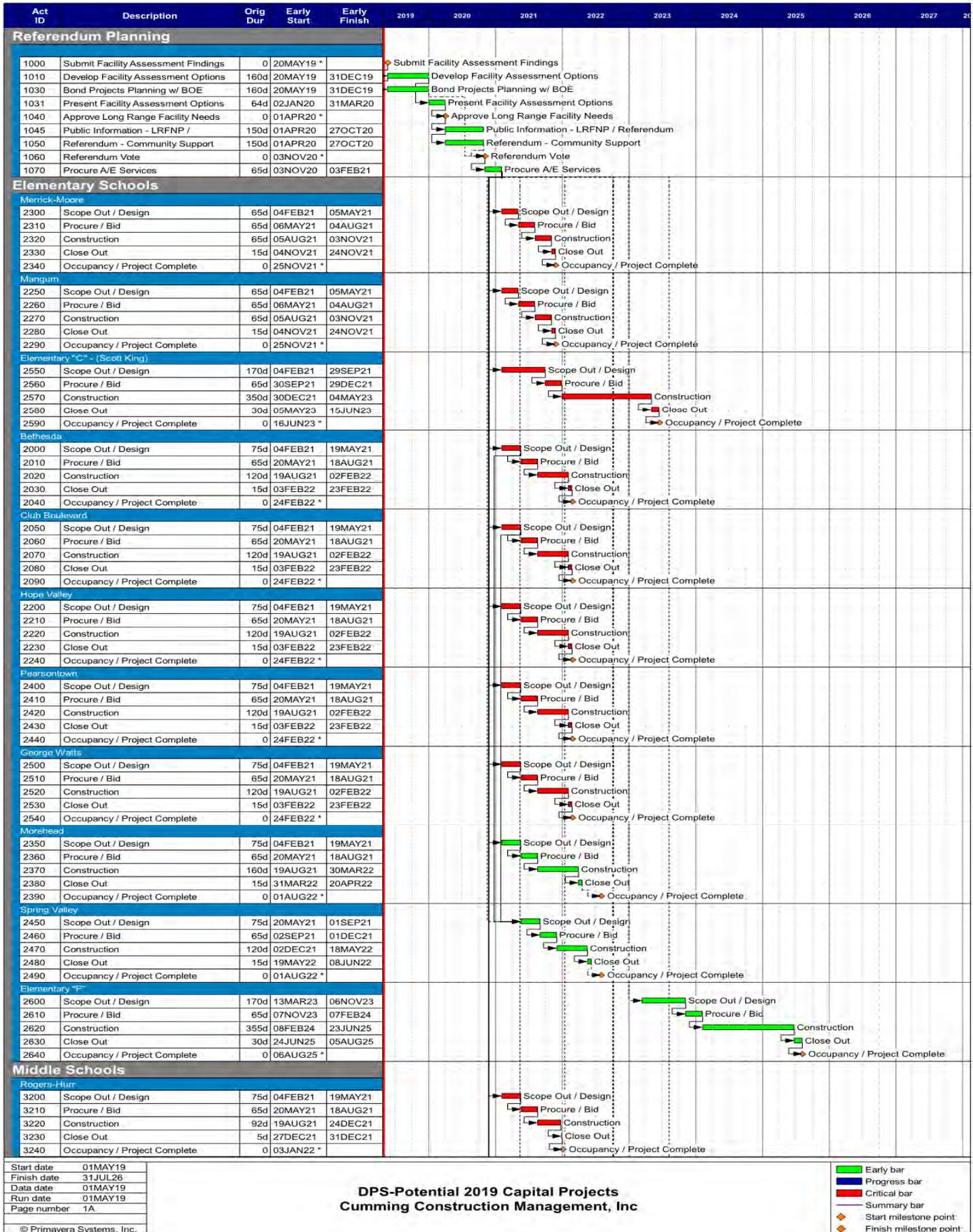
A new elementary school is estimated to take about 30 to 33 months from beginning to end with the actual construction time estimated at 14 to 16 months. New high schools are estimated at 40 to 51 months with the construction period representing 24 / 28 months. Durham Public Schools can help by beginning the design team selection before funding is available but not execute a contract until the funds are authorized or move forward with design funding and complete design so a “shovel ready” project exists. Land acquisition and design take approximately nine to eighteen months and are dependent upon certain stages in the approval process by public agencies as well. The public agency approval process is integrated or heavily intertwined in the design period and typically adds two months to the design process. Bidding, Board approvals and the execution of contracts can add several months of time as well. Funds should be made available for the process in a “reverse engineering” fashion to ensure that there is adequate time to not only deliver the facility but also time to commission, furnish, and occupy it prior to the first bell.

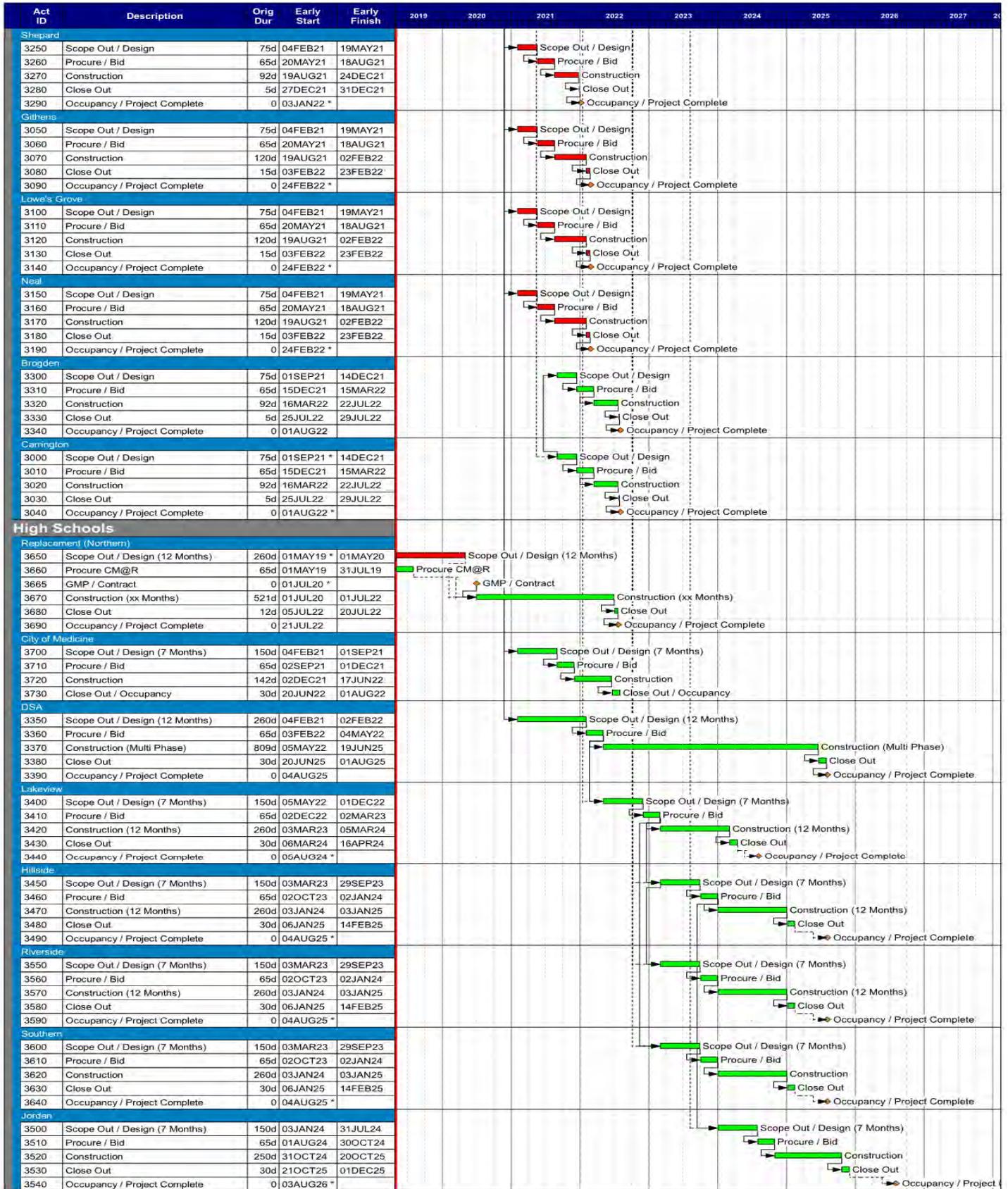
The Long-Range Facility Assessment (LRFA) includes the potential for two new Elementary Facilities (depending on redistricting) and one new High School Facility (replacement of Northern High School) over the next ten years. One new elementary school will be opening in August of 2023 with the other coming online in 2025. The new High School, which is a replacement for Northern High School is needed in July of 2022. Design is currently underway on the new High School Facility.

Of equal value, this LRFA is addition & renovation-heavy, so not only is adequate planning a significant issue but the constraint of time for executing the work is a major obstacle. The timing associated with starting the design is critical to when the design is complete, reviewed, approved, bid, awarded, and implemented. As summers are historically the best time to conduct heavy renovations, special attention should be paid so that there is adequate time between the project award date and the first day of summer to conduct the proper planning on the contractor's part, however, due to the sheer size of some renovations, completion during a single summer is not reasonable and therefore some consideration should be given to developing swing space and allowing access to facility for a full year. Development of adequate swing space can be difficult and often times logistically complicated but can be the difference in delivering a safe and successful project. As an example of swing space; the District could build a new facility but prior to occupancy by its permanent student body, the facility would temporarily house the student's that are assigned to another school for an extended period of time, most likely a year. This process would allow the renovation / construction process to occupy an entire facility and conduct the planned work scope without artificial constraints. As an added benefit, the use of swing space would eliminate potential safety / security issues associated with contractor and staff / student interaction and it will also generate cost avoidance / savings due to uncomplicating the facility access for the construction staff.

Lastly, it is critical that any and all projects be prioritized and staggered to avoid saturating the bid market and stressing a labor market, which will negatively impact project budgets. The schedule for these projects will have to be refined as we move into a Facilities Plan.

CAPITAL PLANNING & PROJECT SCHEDULE





Start date	01MAY19
Finish date	31JUL26
Data date	01MAY19
Run date	01MAY19
Page number	2A
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**DPS-Potential 2019 Capital Projects
Cumming Construction Management, Inc**

█	Early bar
█	Progress bar
█	Critical bar
█	Summary bar
◆	Start milestone point
◇	Finish milestone point



DURHAM

PUBLIC SCHOOLS

ELEMENTARY SCHOOL CONCLUSION

The elementary school facilities were recently impacted

by the North Carolina K-3 Legislation, which effectively reduces the student teacher ratio and is being phased in over a multi-year period. Due to the lengthy nature of developing physical additions, this assessment implements this capacity reduction into immediate account in an effort to determine the facilities that will be impacted.

As expected, K-5 facilities continue to be the group that is most impacted by compartmentalized growth, which is most often the case in school districts. In Durham Public Schools the student make-up of these facilities as compared to the entire District's student population is approximately 44.8%; almost half. Over the last ten years, DPS has brought online two new elementary schools, Sandy Ridge Elementary School and Spring Valley Elementary School which increased the District-wide K-5 capacity to 16,380, however, the implementation of the K-3 Legislation decreases that capacity to 15,304, a decrease in capacity by over 1,000 across the district's thirty (30) elementary facilities. This decrease equates to removing 51 classrooms.

The 2019 10-day enrollment was 15,145, 159 students below capacity and although the District, as a whole, currently has sufficient capacity for the elementary grade levels, some facilities are at or above capacity. However, the overall elementary enrollment is expected to fall by 520 students by the 2028 / 2029 school year, the facilities located in the southern part of the county will continue to grow and because of this anticipated growth, it is suggested that either classroom additions be planned for those affected facilities and at least one new elementary school be constructed in the southwest section of the County. There is a possibility that a second new elementary school should be planned, constructed, and brought online in conjunction with school closings and student consolidation.

The financial section was developed as an all-inclusive, worst case scenario in terms of capital costs associated with additions and new facility development. It should be understood that, based on options identified below, the overall financial forecast can be

revised (and reduced). The follow up component of this assessment is development of cost models based on said options in an effort to convert the assessment into a "Plan" that is adopted and implemented by the District.

OPTIONS FOR CONSIDERATION AND DEVELOPMENT

- Redistrict to level enrollment (reduce choice / magnet options)
- Build Additions per assessment and keep attendance districts, choice options as currently exist
- Build an additional school and some additions and redistrict to level enrollment
- Build two additional schools, consolidate several smaller schools, redistrict to level enrollment
- Combination of the above

MIDDLE SCHOOL CONCLUSION

The current middle school level student capacity in the

District is 6,730 and the ten-day enrollment for 2018 / 2019 was 5,741 students, a decrease in enrollment of 1,693 students since the 2013 / 14 school year. Overall, the District currently has 989 seats available for growth, however, the trend over the next ten years is for the enrollment to continue downward through the 2028 / 29 school year when attendance is expected to be 5,679 students.

Although the overall enrolment trend is for a reduction in attendance at the 6 – 8 level, the District has “pockets” of growth that will stress the capacity at three (3) middle schools: Lowe’s Grove, Neal, and, Sherwood (which is currently more than 150 students over capacity). The District should consider several options in an effort to address these pressure points.

As stated in the elementary conclusion, the financial section of this document was developed as an all-inclusive, worst case scenario in terms of capital costs associated with additions and it should be understood that, based on options identified below, the overall financial forecast can be revised (and possibly reduced). The follow up component of this assessment is development of cost models based on said options in an effort to convert the assessment in to a “Plan” that is adopted and implemented by the District.

OPTIONS FOR CONSIDERATION AND DEVELOPMENT

- Redistrict to level enrollment (reduce choice / magnet options)
- Build Additions per assessment and keep attendance districts, choice options as currently exist
- Build some additions, consolidate smaller school(s), and redistrict to level enrollment
- Other (i.e., build a K-8 facility that could also assist the localized K-5 facility issues)

HIGH / 6-12 CHOICE SCHOOL CONCLUSION

Of all facilities, high schools are the most difficult to

review and determine specific capacities. These facilities offer a varying number of electives, which although occupy classroom space, do not count towards the core capacity of a facility on a 1:1 basis. If a facility offers a greater variety and number of electives, the capacity of said facility could even decrease, but the inverse of that condition is also true. Due to these conditions, as well as higher typical student to teacher ratios, the high school facilities can often operate at an “above capacity” level much more efficiently than the other facilities, but that requires that teachers float and be put on carts to ensure all classrooms are used during every block or period.

The enrollment trend at the high school level is opposite to that of the elementary and middle school level and is expected to increase over the next ten years by 228 students. At the beginning of the 2018 / 19 school year, 11,544 9th – 12th students were enrolled in DPS high schools and by 2029, expectations are that the enrollment will increase by 228 students to 11,772. This enrollment, although slightly under the District wide capacity of 11,790 students, will exceed the capacity at five (5) schools. Incidentally, the student enrollment at the beginning of the 2013 / 14 school year was 9,634 students, a growth amount of 2,156 students over the previous five years. Growth at the high school level is in direct conflict to both the elementary and middle school levels and is more in line with the anticipate student growth relative to the overall population growth in Durham County. This seems to indicate that the elementary and middle school aged children that would attend DPS facilities are attending alternate facilities but are being enrolled at DPS facilities at the high school level.

Additionally, the replacement school for Northern High School is in design and the planned capacity of 1,400, although suitable for the attendance district, will result in a net decrease in district wide high school capacity by 390 students. Ultimately, enrollment relief will need to be realized at the following facilities: Jordan, Hillside, Riverside, Clement Early College, City of Medicine, and Durham School of the Arts. Multiple options are available to address this pressure:

OPTIONS FOR CONSIDERATION AND DEVELOPMENT

- Redistrict to level enrollment (reduce choice / magnet options)
- Build Additions per assessment and keep attendance districts, choice options as currently exist
- Build the replacement high school with a capacity larger than 1,400 students and enlarge the attendance zone or consolidate one of the smaller programs into the facility
- Relieve enrollment at Hillside High School by relocating the Hillside New Tech curriculum
- Completely renovate DSA, including demolishing some structures and building new ones to add capacity if feasible and support curriculum
- Combination of the above.

CENTRAL SERVICES CONCLUSION

Facilities that do not directly house students are consid-

ered central service or support facilities and are often prioritized at a lower level than educational facilities. However, these facilities are just as important to the success of the District as an educational facility and are critical to the implementation of the District's mission. Without the staff housed in these facilities, the District would have no leadership, no financial accounting, no ability to maintain structures, and no way to transport students. The District has the same duty to this staff as it does to the students placed in their charge and providing and maintaining facilities at a high level promotes a professional and motivated environment.

The facility needs for the District include development of four (4) bus maintenance facilities, a bus wash bay, replacing mobile units that currently house the capital / construction management staff with a permanent structure, and conducting typical maintenance. Having said that, it would be wise to look at all central service facilities to gauge to value of consolidation of like services so that the discharge of these services can be conducted more efficiently. Additionally, consolidation of facilities could result in a net decrease in operational yearly costs as well as elimination of required maintenance on facilities removed from the District's inventory. This LRFA does not include budgeting for such consolidation but if desired by DPS, cost models can be developed for consideration. Potential options associated with Central Service facilities include the following:

OPTIONS FOR CONSIDERATION AND DEVELOPMENT

- Maintain facilities as currently exist per the LRFA
- Consolidate services by building a new administrative facility that includes training space and sell the existing administration and staff development building
- Other options exist and can be investigated during future planning phase.



DURHAM
PUBLIC SCHOOLS



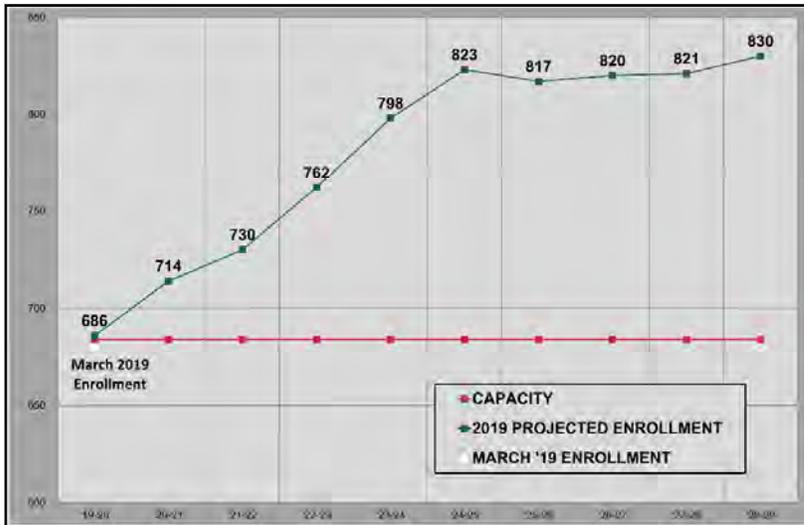
BETHESDA ELEMENTARY

209 S. MIAMI BOULEVARD

- School #:** 304
- Building Size:** 85,432 Square Feet
- Grade Level:** K-5
- Year Built:** 1981, '89, '03
- Site Size:** 43.9 Acres

SUMMARY

Bethesda Elementary School, Originally built in 1982 and subsequently expanded in 1989 and 2003 is currently at 99% occupancy level and enrollment will continue to increase to 121% by 2028. Therefore relief will be required via a facility expansion (approximately six classrooms) or revision of the current attendance district. The 1989 expansion is at the age where building systems and finishes are ageing out and therefore a renovation of this area should be considered in the near future. Additionally, some components of the entire HVAC system should be replaced due to life expectancy. The Facility Condition Level will be 0.34 in 2028 if no work is addressed.



Current Capacity: 684 Students

Current Enrollment: 680 Students
99%

Projected Enrollment: 830 Students
121%

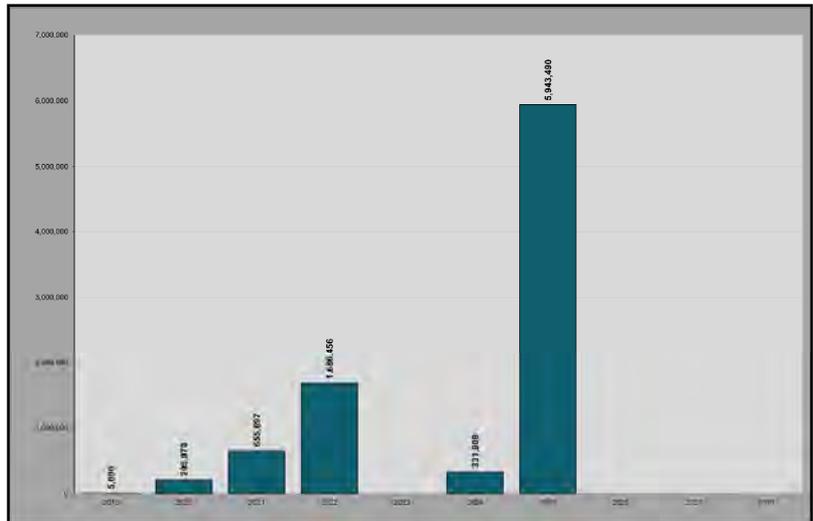
Square Feet per Student: 124.9 sf

Facility Condition Index: .34

New Construction: \$1,814,700

Current / Deferred Maintenance: \$7,013,821

Total Facility Needs: \$8,828,521



Durham Public Schools Capital Improvement Plan			Bethesda Elementary		School 304	Summary Sheet	
Category/Description	Campus Program Total		\$ 8,828,521		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction					Currently at 99% Occupancy Level but will increase to 121%		
- Addition		6,000	\$200.00	\$1,200,000	Six (6) Classroom Addition	2022	\$162,000
-				\$0			
Renovation							
- 20 Year Renovation		7,600	\$30.00	\$228,000	1982 Building (16 Years Beyond Cycle)	2025	\$61,560
- 20 Year Renovation		67,832	\$30.00	\$2,034,960	1989 Building	2025	\$549,439
- 20 Year Renovation		10,000		\$0	2003 Addition	2030	\$0
- Theater Arts Renovation	\$60,000			\$60,000	A/V, Lights, Rigging	2025	\$16,200
-				\$0			
Site							
- Grading for New Construction	\$115,000			\$115,000	Site Prep For Classroom Addition	2022	\$15,525
- Drainage / Erosion	\$25,000			\$25,000	Allowance: Correct Drainage to Building at major slope & Front	2020	\$1,125
- Landscaping / Grassing	\$5,000			\$5,000	Landscape Refresh	2025	\$1,350
- Irrigation				\$0			
- Athletic Field(s) / Playground(s)		5,000	\$6.00	\$30,000	Full Surface Replacement	2020	\$1,350
- Athletic / Playground Equipment				\$0	Replace Playground Equipment	2025	\$0
- Parking Lot(s)		3,300	\$25.00	\$82,500	Repair and Overlay of Existing Asphalt	2020	\$3,713
- Driveway(s) / Turn lane(s)				\$0	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2030	\$0
- Sidewalks		1,000	\$10.00	\$10,000	Repair Broken Sidewalk @ Bus Entrance	2020	\$450
- ADA	\$10,000			\$10,000	Allowance: Add ramp to 1982 building	2020	\$450
- Fencing		300	\$75.00	\$22,500	Install 5ft Ornamental Fencing	2020	\$1,013
- Fencing		400	\$24.00	\$9,600	Replace Fence at Main Playground	2020	\$432
- Site Lighting	\$15,000			\$15,000	DPS Owned System, Replace to LED	2025	\$4,050
- Site Lighting	\$5,000			\$5,000	Add Pole Light at Miami Blvd.	2025	\$1,350
- Utilities				\$0			
-				\$0			
Building Envelope							
- Structural	\$5,000			\$5,000	Investigate Cracks in Corridors	2019	\$0
- Roof: Low Slope		75,148		\$0	Main Building & 1982 Addition Roofed in 2012	2032	\$0
- Roof: Low Slope		10,000		\$0	Replace the 2003 Addition (2012)	2032	\$0
- Roof: Metal				\$0			
- Exterior Walls				\$0			
- Exterior Doors				\$0			
- Storefronts / Window Walls				\$0			
- Windows				\$0			
- Pressure Wash Exterior	\$7,500			\$7,500		2020	\$338
-				\$0			
Building Finishes							
- Flooring: VCT / Vinyl				\$0			
- Flooring: Hard Tile / Terrazzo				\$0			
- Flooring: Sports Flooring / Other		1,500	\$10.00	\$15,000	Replace Stage Floor (Wood)	2025	\$4,050
- Ceiling: ACT				\$0			
- Ceiling: Other				\$0			
- Walls: Painting		85,432	\$1.50	\$128,148	Per 7-Year Cycle (with 20 Year Renovation)	2025	\$34,600
- Walls: Other				\$0			
- Casework				\$0			
- Interior Doors / Windows				\$0			
- ADA / Code Upgrades				\$0			
- Asbestos Abatement		27,500	\$1.40	\$38,500	All of Building, Excluding 2003 Addition	2025	\$10,395
-				\$0			
Building Systems							
- Food Service	\$75,000			\$75,000	Replace Cooler / Freezer	2025	\$20,250
- Plumbing		6	\$1,000.00	\$6,000	Repair / Replace Water Coolers	2025	\$1,620
- Plumbing		3	\$10,000.00	\$30,000	Replace Water Heaters (3) 100 Gal	2025	\$8,100
- Fire Sprinkler				\$0			
- HVAC		85,432		\$0	Replace Chiller - Per 12 Year Cycle (replaced in 2019)	2032	\$0
- HVAC		85,432	\$2.00	\$170,864	Boilers (2) - Per 20 Year Cycle	2022	\$23,067
- HVAC		85,432	\$14.00	\$1,196,048	Indoor Air Units are Original - Replace	2025	\$322,933
- Electrical				\$0			
- Fire Alarm		85,432	\$1.75	\$149,506	Full System Replacement - Per 20 Year Cycle	2024	\$33,639
- Security: Cameras		30	\$1,350.00	\$40,500	Upgrade Existing "Older" I.P. Cameras & Server	2024	\$9,113
- Security: Intrusion	\$8,323			\$8,323	Head End Replacement - Per 20 Year Cycle	2024	\$1,873
- Intercom		85,432	\$0.85	\$72,617	Full System Replacement - Per 20 Year Cycle	2024	\$16,339
- Access Controls	\$20,000			\$20,000	S2 Door Access	2021	\$1,800
-				\$0			
Technology							
- Router / Switch Equipment				\$0	Replace - Per 5 Year Cycle		
- UPS				\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points				\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System				\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks				\$0	Additional Drops		
- Classroom A/V				\$0	Replace - Per 5 Year Cycle		
-				\$0			
Facility Improvements Sub Total				\$5,815,566			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$581,557		2021	\$52,340
Survey/Testing	1.5%			\$87,233		2025	\$23,553
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3%			\$174,467	Allowance - Refresh	2025	\$47,106
Land Purchase				\$0			
Contingency	10%			\$581,557		2025	\$157,020
Support Costs Subtotal				\$1,424,814			
Program Subtotal				\$7,240,380			
Program Escalation				\$1,588,141			\$1,588,141
Program Total				\$8,828,521			



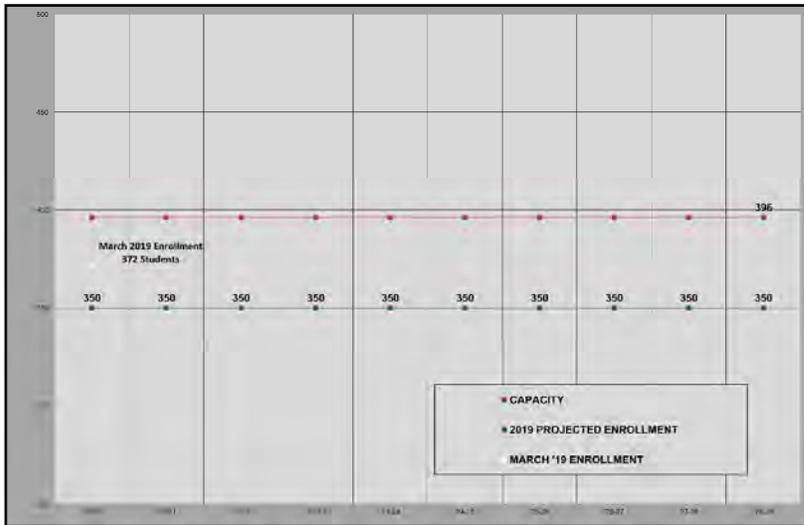
BURTON ELEMENTARY

1500 MATHISON AVENUE

School #: 305
Building Size: 71,360 Square Feet
Grade Level: PK-5
Year Built: 1949, '54, '76, '92
Site Size: 7.1 Acres

SUMMARY

Burton Elementary School, built in 1949, was expanded or renovated in 1954, 1976, and 1992, and it was recently renovated. Over the next ten years, the anticipated facility needs should be limited to replacement of ageing building systems and an upstairs restroom renovations. The current enrollment is 372, which is slightly under the building's student capacity and since this is a magnet facility, enrollment should be capped at 350 each year for the next ten years to avoid overcrowding.



Current Capacity: 396 Students

Current Enrollment: 372 Students
94%

Projected Enrollment: 350 Students
88%

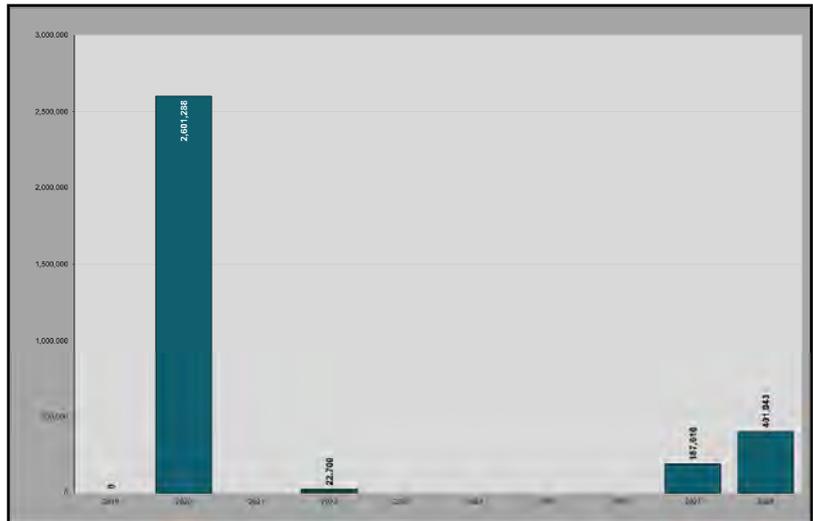
Square Feet per Student: 180.2 sf

Facility Condition Index: .15

New Construction: \$56,760

Current / Deferred Maintenance: \$3,155,887

Total Facility Needs: \$3,212,647



Durham Public Schools Capital Improvement Plan			Burton Elementary		School 305	Summary Sheet		
Category/Description	Campus Program Total		\$ 3,212,647		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A Facility Improvements:								
New Construction								
- Addition		or		\$0	Currently at 94% Occupancy Level but will reduce to 88%			
- Canopies		or	800	\$55.00	\$44,000	Add Canopy at Student Drive (100LF)	2020	\$1,980
-		or			\$0			
Renovation								
- Security Vestibule		or			\$0	Develop Passive Security at Front Office (2019)		
- 20 Year Renovation		or	1,000	\$200.00	\$200,000	Restroom Upgrade at Staff & Upstairs Group (Downstairs Completed)	2020	\$9,000
- 20 Year Renovation		or	71,360		\$0	20-yr. cycle (1949,54,67,92) (2015)	2035	\$0
- Theater Arts Renovation	\$60,000	or			\$60,000	A/V, Lights, Rigging	2020	\$2,700
-		or						
Site								
- Grading for New Construction		or			\$0			
- Drainage / Erosion	\$15,000	or			\$15,000	Allowance: Storm Drainage Issues at Courtyard / Staff Entrance	2020	\$675
- Landscaping / Grassing	\$5,000	or			\$5,000	Landscape Refresh	2020	\$225
- Irrigation		or			\$0			
- Athletic Field(s) / Playground(s)		or			\$0			
- Athletic / Playground Equipment	\$15,000	or			\$15,000	Resurface Asphalt Court	2020	\$675
- Parking Lot(s)	\$150,000	or			\$150,000	Allowance: Redesign / Rebuild Small Parking Lot at Back of Facility	2020	\$6,750
- Parking Lot(s)	\$10,000	or			\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2020	\$450
- Driveway(s) / Turn lane(s)		or			\$0			
- Sidewalks	\$3,000	or			\$3,000	Repair Sidewalk at Front of School	2020	\$135
- ADA		or			\$0			
- Fencing		or			\$0			
- Site Lighting		or	2	\$2,500.00	\$5,000	Add Lighting at Back of School (Add two wall packs)	2020	\$225
- Utilities		or			\$0	Utility Owned		
-		or			\$0			
Building Envelope								
- Structural		or			\$0			
- Roof: Low Slope		or			\$0	Replace Original Building & Courtyard Connector Roofs (2013)	2033	\$0
- Roof: Low Slope		or			\$0	Replace Front & Back Additions (2016)	2036	\$0
- Roof: Metal		or			\$0			
- Exterior Walls		or			\$0			
- Exterior Doors		or			\$0			
- Storefronts / Window Walls		or			\$0			
- Windows		or			\$0			
-		or			\$0			
Building Finishes								
- Flooring: VCT / Vinyl		or			\$0			
- Flooring: Hard Tile / Terrazzo		or			\$0			
- Flooring: Sports Flooring		or			\$0			
- Ceiling: ACT		or			\$0			
- Ceiling: Other		or			\$0			
- Walls: Painting		or	71,360	\$1.50	\$107,040	Per 7-Year Cycle (with 20 Year Renovation)	2020	\$4,817
- Walls: Other		or	71,360	\$1.00	\$71,360	Walls Damaged due to High Moisture (Throughout Building)	2020	\$3,211
- Casework		or			\$0			
- Interior Doors / Windows		or			\$0			
- ADA / Code Upgrades		or			\$0			
- Asbestos Abatement	\$75,000	or			\$75,000	Floor and Pipe Abatement	2020	\$3,375
-		or			\$0			
Building Systems								
- Food Service		or			\$0	Replace Hood, Freezer / Cooler (2013)	2033	\$0
- Food Service	\$85,000	or			\$85,000	Replace Dish Washer, Kitchen Equipment	2027	\$30,600
- Plumbing		or	2	\$5,000.00	\$10,000	Replace Water Heaters (2) 100 Gal	2020	\$450
- Fire Sprinkler		or			\$0			
- HVAC		or	71,360	\$4.00	\$285,440	Chiller Replacement (2) - Per 12 Year Cycle (2017)	2028	\$115,603
- HVAC		or	71,360	\$2.00	\$142,720	Replace Boiler (20 Year Cycle)	2020	\$6,422
- HVAC		or	71,360	\$14.00	\$999,040	Replace AHUs	2020	\$44,957
- HVAC		or	71,360		\$0	Controls - Per 20 Year Cycle (2016)	2036	\$0
- Electrical		or			\$0			
- Fire Alarm		or	71,360		\$0	Full System Replacement - Per 20 -Year Cycle (2014)	2034	\$0
- Security: Cameras	\$48,000	or			\$48,000	Full System Replacement - Per 10-Year Cycle	2027	\$17,280
- Security: Intrusion	\$4,953	or			\$4,953	Head End Replacement - Per 20 -Year Cycle	2027	\$1,783
- Intercom		or	71,360		\$0	Head End Replacement - Per 20 -Year Cycle (2014)	2034	\$0
- Access Controls	\$20,000	or			\$20,000	S2 Door Access	2022	\$2,700
-		or			\$0			
Technology								
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle		
- UPS		or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or			\$0	Additional Drops		
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle		
-		or			\$0			
Facility Improvements Sub Total					\$2,355,553			
II B Support Costs								
Prof/Pm/Support Fees	10%				\$235,555		2020	\$10,600
Survey/Testing	1.5%				\$35,333		2020	\$1,590
Storage and Moving					\$0			
City Fees/County					\$0			
FF&E	3%				\$70,667	Allowance - Refresh	2020	\$3,180
Land Purchase					\$0			
Contingency	10%				\$235,555		2020	\$10,600
Support Costs Subtotal					\$577,110			
Program Subtotal					\$2,932,663			
Program Escalation					\$279,983			\$279,983
Program Total					\$3,212,647			



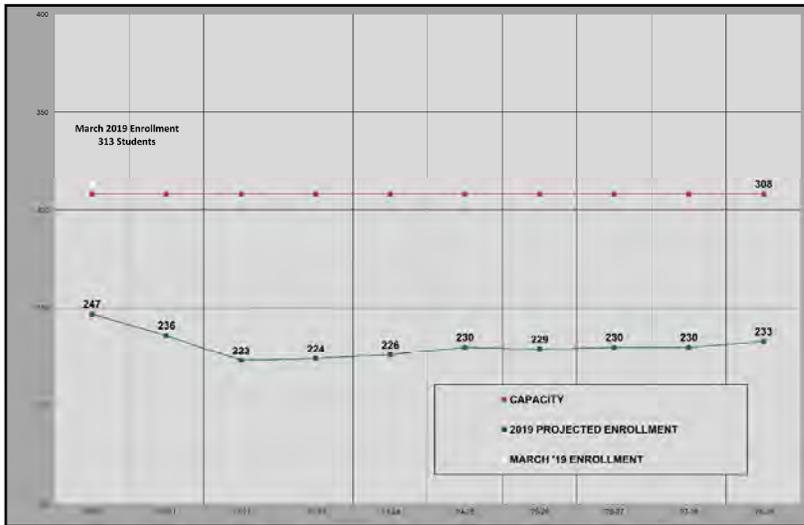
C.C. SPAULDING ELEMENTARY

1531 ROXBORO RD

- School #:** 375
- Building Size:** 69,486 Square Feet
- Grade Level:** PK-5
- Year Built:** 1954, '60, '76, '91, '08
- Site Size:** 9.9 Acres

SUMMARY

C.C. Spaulding Elementary School, built in 1954 has a capacity of 308 students and a 2018 / 2019 enrollment of 313 students, which is slightly over capacity at 102%. Enrollment is anticipated to fluctuate slightly over the next ten years and ending with 233 students in 2028, which represents a 76% occupancy level. The FCI will be low, due to the roof replacement in 2018, HVAC chiller replacement in 2017, and the HVAC control replacement in 2016, however, the facility will need a 20 year cycle renovation and the balance of the HVAC system addressed within the next ten years to maintain the good FCI rating.



Current Capacity: 308 Students

Current Enrollment: 313 Students
102%

Projected Enrollment: 233 Students
76%

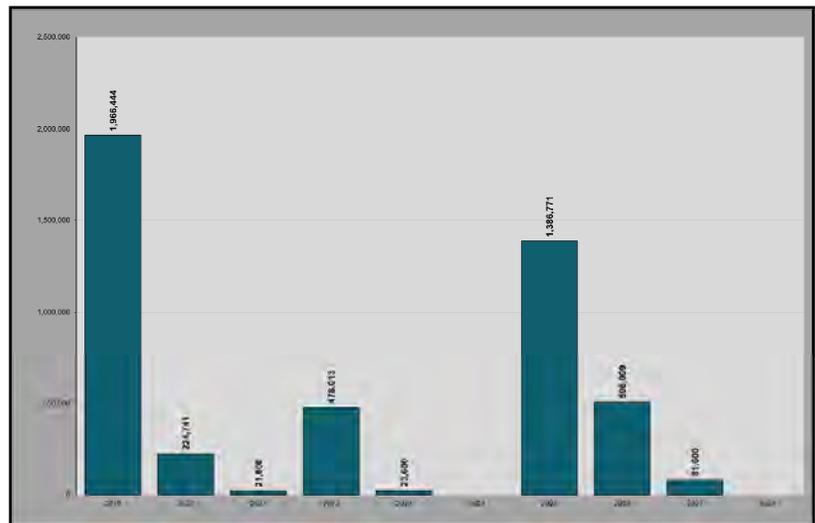
Square Feet per Student: 225.6 sf

Facility Condition Index: .22

New Construction: \$0

Current / Deferred Maintenance: \$4,688,978

Total Facility Needs: \$4,688,978



Durham Public Schools		C.C. Spaulding Elementary		245		Summary Sheet		
Capital Improvement Plan		Campus Program Total		\$ 4,688,978				
Category/Description	Campus Program Total		\$ 4,688,978		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A Facility Improvements:								
New Construction								
- Addition		or		\$0	Currently at 102% Occupancy Level and will decrease to 76%			
- Renovation		or		\$0				
- 20 Year Renovation		or	4,000	\$75.00	\$300,000	Cafeteria Kitchen Renovation & Reconfiguration	2025	\$81,000
- 20 Year Renovation		or	12,250	\$25.00	\$306,250	2005 Addition	2025	\$82,688
- Security Vestibule		or			\$0	Develop Passive Security at Front Office (2019)		
- Theater Arts Renovation	\$60,000	or			\$60,000	A/V. Lights, Rigging	2025	\$16,200
Site								
- Grading for New Construction		or			\$0			
- Drainage / Erosion	\$8,000	or			\$5,000	Water Intrusion at Doors and Lower Lab	2019	\$0
- Landscaping / Grassing	\$5,000	or			\$5,000	Landscape Refresh	2025	\$1,350
- Irrigation		or			\$0			
- Athletic Field(s) / Playground(s)		or	3,000	\$10.00	\$30,000	Replace Playground Surface - Damaged Tiles	2019	\$0
- Athletic / Playground Equipment		or			\$0			
- Parking Lot(s)	\$10,000	or			\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2022	\$1,350
- Parking Lot(s)		or	20	\$2,250.00	\$45,000	Add Parking lot at Gravel Drive in Front of School	2022	\$6,075
- Driveway(s) / Turn Lane(s)		or			\$0			
- Sidewalks		or			\$0			
- ADA	\$5,000	or			\$5,000	Playground ADA Access	2022	\$675
- Fencing		or	1,200	\$24.00	\$28,800	Additional Fencing Needed / Perimeter	2019	\$0
- Site Lighting		or			\$0	Duke Energy Owned System		
- Site Lighting	\$20,000	or			\$20,000	Improve Exterior Signage / Main Sign	2019	\$0
- Utilities		or			\$0			
-		or			\$0			
Building Envelope								
- Structural		or			\$0			
- Roof: Low Slope	\$211,083	or			\$211,083	Replace Gym, Main Bldg, E. Canopies (N, N1, M, M1)	2026	\$66,491
- Roof: Low Slope		or			\$0	Replace Main Building, Auditorium Canopy Roofs (2018)	2038	\$0
- Roof: Metal		or			\$0			
- Exterior Walls	\$50,000	or			\$50,000	Allowance: Repairs needed at Soffits / Refinish	2019	\$0
- Exterior Doors		or			\$0			
- Storefronts / Window Walls		or			\$0			
- Windows		or			\$0			
-		or			\$0			
Building Finishes								
- Flooring: VCT / Vinyl		or			\$0			
- Flooring: Hard Tile / Terrazzo		or			\$0			
- Flooring: Sports Flooring / Carpet		or	8,000	\$8.00	\$64,000	Allowance: Replace Auditorium Carpet and Stage Curtains	2020	\$2,880
- Ceiling: ACT		or			\$0			
- Ceiling: Other		or			\$0			
- Walls: Painting		or	69,486	\$1.50	\$104,229	Per 7-Year Cycle	2019	\$0
- Walls: Other		or			\$0			
- Casework		or			\$0			
- Interior Doors / Windows		or			\$0			
- ADA / Code Upgrades		or			\$0			
- Asbestos Abatement		or	34,576	\$1.40	\$48,406	Abatement per AHERA Report	2022	\$6,535
-		or			\$0			
Building Systems								
- Food Service	\$225,000	or			\$225,000	Replace Hood, Dish Washer, Cooler / Freezer	2022	\$30,375
- Food Service	\$85,000	or			\$85,000	Refresh Kitchen Equipment	2025	\$22,950
- Plumbing		or	2	\$10,000.00	\$20,000	Water Heaters (2) 125 Gal	2023	\$3,600
- Fire Sprinkler		or			\$0			
- HVAC		or			\$0	Chiller Replacement - Per 20 Year Cycle (1 of 2) (2017)	2029	\$0
- HVAC		or	69,486	\$4.00	\$277,944	Chiller Replacement - Per 20 Year Cycle (2 of 2) (2002)	2019	\$0
- HVAC		or	69,486	\$2.00	\$138,972	Replace Boilers (3) - Per 20 Year Cycle	2019	\$0
- HVAC		or	69,486	\$14.00	\$972,804	Replace FCU / UV	2019	\$0
- HVAC		or	69,486		\$0	Replace Controls - Per 20 Year Cycle (2016)	2036	\$0
- Electrical		or	21,000	\$1.50	\$31,500	Replace Balance of T8s to LED (30% of Facility)	2022	\$4,253
- Fire Alarm		or	69,486	\$2.50	\$173,715	Full System Replacement - Per 20 Year Cycle	2026	\$54,720
- Security: Cameras	\$60,000	or			\$60,000	Full System Replacement - Per 6 Year Cycle (Replaced 2018)	2027	\$21,600
- Security: Intrusion	\$56,250	or			\$56,250	Full System Replacement - Per 20 Year Cycle	2022	\$7,594
- Intercom		or			\$0	Full System Replacement - Per 20 Year Cycle		
- Access Controls	\$20,000	or			\$20,000	S2 Door Access	2021	\$1,800
-		or			\$0			
Technology								
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle		
- UPS		or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or			\$0	Additional Drops		
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle		
-		or			\$0			
Facility Improvements Sub Total					\$3,356,953			
II B Support Costs								
Prof/Pm/Support Fees	10%				\$335,695		2019	\$0
Survey/Testing	1.5%				\$50,354		2020	\$2,266
Storage and Moving					\$0			
City Fees/County					\$0			
FF&E	3%				\$100,709	Allowance - Refresh	2020	\$4,532
Land Purchase					\$0			
Contingency	10%				\$335,695		2025	\$90,638
Support Costs Subtotal					\$822,454			
Program Subtotal					\$4,179,407			
Program Escalation					\$509,571			\$509,571
Program Total					\$4,688,978			



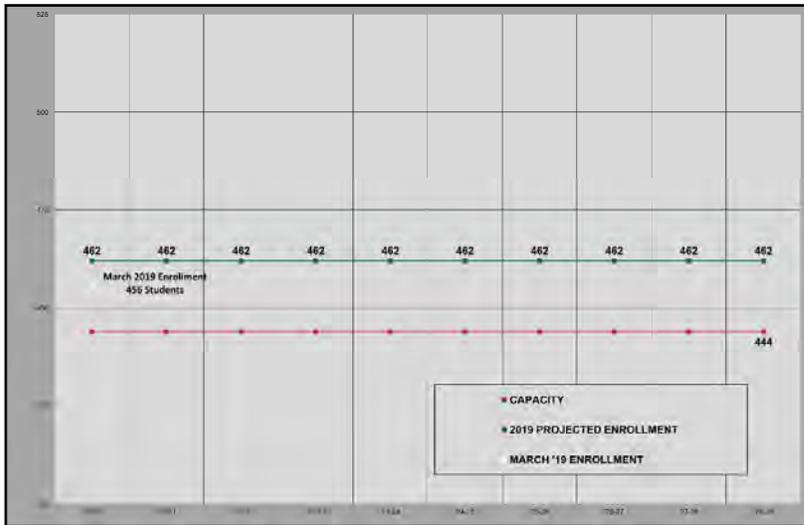
CLUB BOULEVARD ELEMENTARY

400 WEST CLUB BOULEVARD

- School #:** 318
- Building Size:** 45,099 Square Feet
- Grade Level:** K-5
- Year Built:** 1949, '55, '90, '92, '95, '10
- Site Size:** 5.5 Acres

SUMMARY

Club Boulevard Elementary School received an addition in 2010 and the roof was replaced in 2018 but as the FCI becomes critical in 2020 at 0.23 and should no work be undertaken will become critical in 2022. The current and deferred maintenance needs over the next ten years includes, HVAC systems, a full renovation of the kitchen, and, a 20 year cycle renovation of the older additions. Additionally, the current student capacity is 444, which is slightly over capacity and because this facility is a magnet, the enrollment can be managed via an enrollment cap (462 students through 2028). If not, the District should plan a small two classroom addition for 2022.



Current Capacity: 444 Students

Current Enrollment: 456 Students
103%

Projected Enrollment: 462 Students
104%

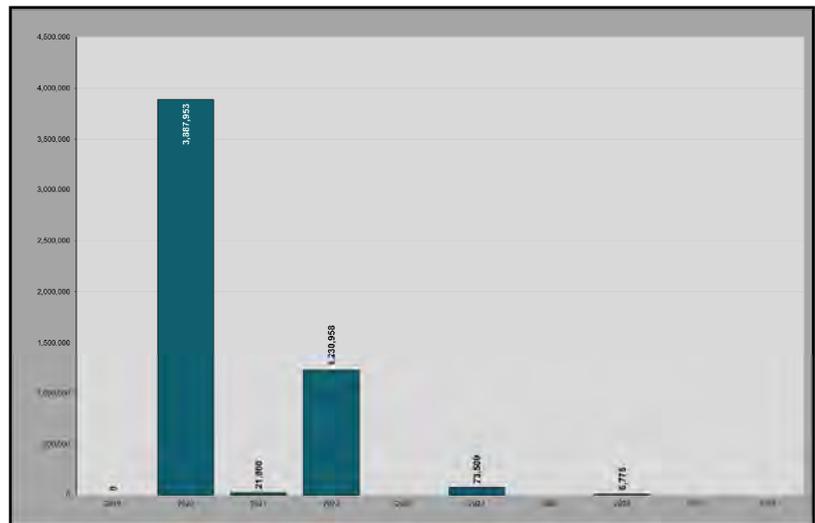
Square Feet per Student: 101.6 sf

Facility Condition Index: .30

New Construction: \$710,700

Current / Deferred Maintenance: \$4,510,285

Total Facility Needs: \$5,220,985



Durham Public Schools		Club Boulevard Elementary		School 318		Summary Sheet	
Capital Improvement Plan		Campus Program Total		\$ 5,220,985			
Category/Description	Lump Sum	Unit	Cost/Unit	Cost Estimate	Comments	Year Required	Escalation
I A Facility Improvements:							
New Construction							
- Addition				\$0	Currently at 103% Occupancy Level and will increase to 104%		
- Addition		2,000	\$200.00	\$400,000	Two (2) Classroom Addition	2022	\$64,000
-				\$0			
Renovation							
- 20 Year Renovation		25,000	\$25.00	\$625,000	20-yr. cycle for the 1949, 1995 addition	2020	\$28,125
- 20 Year Renovation	\$25,000			\$25,000	Renovate Restrooms in Old Building (Under Slab Plumbing is Bad)	2020	\$1,125
- 20 Year Renovation		4,500	\$75.00	\$337,500	Renovate Kitchen (Includes Finishes and Under Slab Plumbing)	2020	\$15,188
- Security Vestibule				\$0	Develop Passive Security at Front Office (2019)		
- Theater Arts Renovation	\$60,000			\$60,000	A/V, Lights, Rigging	2020	\$2,700
Site							
- Grading for New Construction	\$115,000			\$115,000	Site Prep for Addition	2022	\$15,525
- Drainage / Erosion	\$25,000			\$25,000	Drainage Issue on Glendale Ave Side of Campus / Campus Wide	2020	\$1,125
- Landscaping / Grassing	\$5,000			\$5,000	Landscape Refresh	2020	\$225
- Irrigation				\$0			
- Athletic Field(s) / Playground(s)				\$0			
- Athletic / Playground Equipment				\$0			
- Parking Lot(s)	\$10,000			\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2020	\$450
- Parking Lot(s)		30	\$1,500.00	\$45,000	Resurface Parking Lot off Chamberlin Ave	2020	\$2,025
- Driveway(s) / Turn Lane(s)				\$0			
- Sidewalks		500	\$10.00	\$5,000	Allowance: Repair Sidewalk at Glendale Ave	2020	\$225
- ADA	\$5,000			\$5,000	Playground ADA Access	2020	\$225
- ADA	\$20,000			\$20,000	Add HC Ramp at Classroom Doors	2020	\$900
- Fencing				\$0			
- Site Lighting				\$0			
- Utilities				\$0			
Building Envelope							
- Structural				\$0			
- Roof: Low Slope				\$0	Replace Main Building, Gym, Media Center Addition Roofs (2018)	2038	\$0
- Roof: Metal	\$5,152			\$5,152	Replace Front Canopy Roofs	2026	\$1,623
- Roof: Shingle				\$0			
- Exterior Walls				\$0			
- Exterior Doors				\$0			
- Storefronts / Window Walls				\$0			
- Windows				\$0			
Building Finishes							
- Flooring: VCT / Vinyl				\$0			
- Flooring: Hard Tile / Terrazzo				\$0			
- Flooring: Sports Flooring				\$0			
- Ceiling: ACT				\$0			
- Ceiling: Other				\$0			
- Walls: Painting		55,000	\$1.50	\$82,500	Per 7-Year Cycle	2020	\$3,713
- Walls: Other				\$0			
- Casework				\$0			
- Interior Doors / Windows				\$0			
- ADA / Code Upgrades				\$0			
- Asbestos Abatement		32,099	\$1.40	\$44,939	All of Building Excluding 1995 Addition	2020	\$2,022
-				\$0			
Building Systems							
- Food Service	\$250,000			\$250,000	Replace Hood, Dishwasher, Cooler / Freezer	2020	\$11,250
- Food Service	\$85,000			\$85,000	Refresh Kitchen Equipment	2020	\$3,825
- Plumbing		1	\$10,000.00	\$10,000	Replace Water Heater (1) 125 Gal	2020	\$450
- Plumbing	\$3,000			\$3,000	Replace Can Wash	2020	\$135
- Fire Sprinkler				\$0			
- HVAC		45,099		\$0	Chiller - Per 12 Year Cycle	2030	\$0
- HVAC		45,099	\$2.00	\$90,198	Replace Boiler (One Replaced in 2017)	2020	\$4,059
- HVAC		55,000	\$25.00	\$1,375,000	Indoor Air Units - Ceiling Mounted FCs (4 Pipe System)	2020	\$61,875
- HVAC		45,099		\$0	Controls - Per 20 Year Cycle (2016)	2030	\$0
- Electrical		45,099	\$1.50	\$67,649	Replace T12s to LED	2020	\$3,044
- Fire Alarm		45,099	\$2.50	\$112,748	Full System Replacement - Per 20 Year Cycle	2020	\$5,074
- Security: Cameras	\$60,000			\$60,000	Full System Replacement - Per 6 Year Cycle (2018)	2024	\$13,500
- Security: Intrusion	\$5,873			\$5,873	Head End Replacement - Per 20 Year Cycle	2020	\$264
- Intercom		45,099	\$0.85	\$38,334	Head End Replacement - Per 20 Year Cycle	2020	\$1,725
- Access Controls	\$20,000			\$20,000	S2 Door Access	2021	\$1,800
-				\$0			
Technology							
- Route / Switch Equipment				\$0	Replace - Per 5 Year Cycle		
- UPS				\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points				\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System				\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks				\$0	Additional Drops		
- Classroom A/V				\$0	Replace - Per 5 Year Cycle		
-				\$0			
Facility Improvements Sub Total				\$3,927,892			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$392,789		2020	\$17,676
Survey/Testing	1.5%			\$58,918		2022	\$7,954
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3%			\$117,837	Allowance - Refresh	2022	\$15,908
Land Purchase				\$0			
Contingency	10%			\$392,789		2022	\$53,027
Support Costs Subtotal				\$962,333			
Program Subtotal				\$4,890,225			
Program Escalation				\$330,760			\$330,760
Program Total				\$5,220,985			



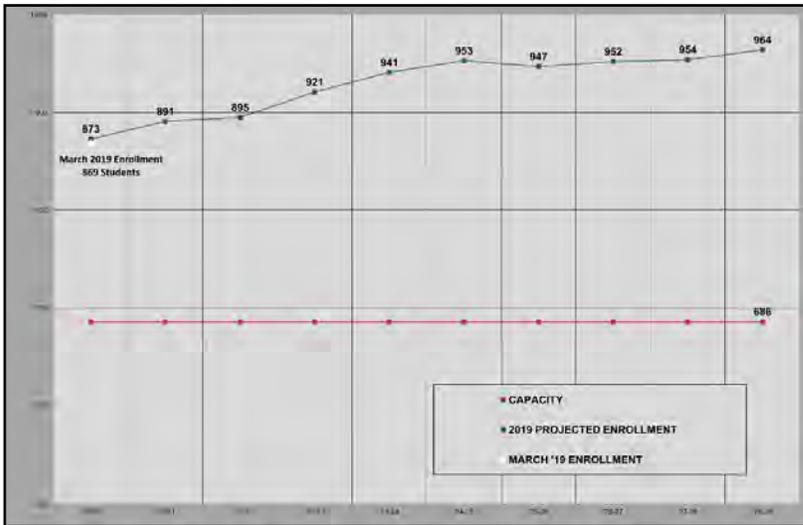
CREEKSIDE ELEMENTARY

5321 EPHEBUS CHURCH RD

- School #:** 319
- Building Size:** 94,673 Square Feet
- Grade Level:** K-5
- Year Built:** 2004, '10
- Site Size:** 37.1 Acres

SUMMARY

Creekside Elementary School was opened in 2004 and is over capacity by 27% and the forecast is that by 2028, there will be 964 students enrolled, equaling an occupancy percentage of 141%. Therefore the District will need to address this overcrowding via classroom addition (approximately 8 classrooms) or by redistricting part of the attendance zone to allow the excess students to be assigned to the new Elementary School C (which should be planned to come on line in 2023). With either option, the District will be able to remove the current modular units located on site which will render a more secure and safer campus. In 2024, the facility will reach the 20 year mark since opening, which is typical life expectancy of many building systems and will require replacement, hence the reason of a poor FCI of 0.28 if items are not addressed by 2028.



Current Capacity: 686 Students

Current Enrollment: 869 Students
127%

Projected Enrollment: 964 Students
141%

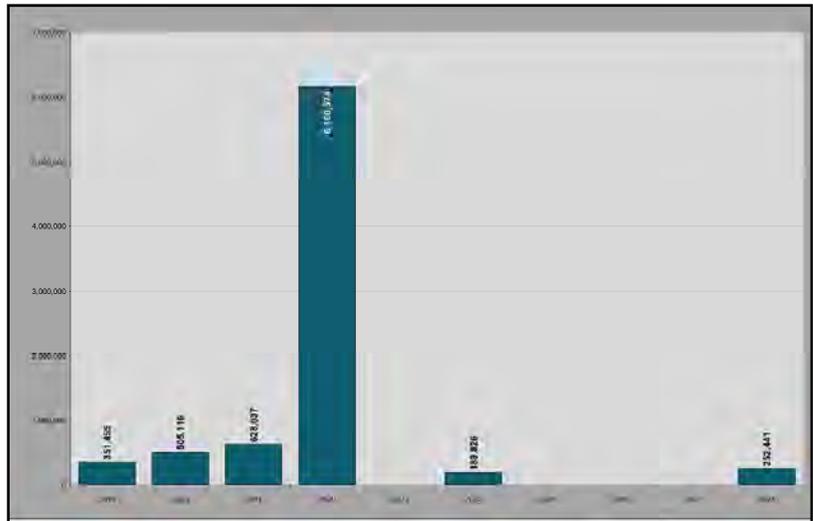
Square Feet per Student: 138.0 sf

Facility Condition Index: .28

New Construction: \$0

Current / Deferred Maintenance: \$8,087,448

Total Facility Needs: \$8,087,448



Durham Public Schools Capital Improvement Plan			Creekside Elementary		School 319	Summary Sheet		
Category/Description	Campus Program Total		\$ 8,087,448		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A Facility Improvements:								
New Construction								
- Addition		or		\$0	Currently at 127% Occupancy Level and will increase to 140%			
- Addition		or	8,000	\$0	Eight (8) Classroom Addition Needed if ES C is not built	2023	\$0	
-		or		\$0				
Renovation								
- 20 Year Renovation		or	94,673	\$25.00	\$2,366,825	Per 20 Year Cycle	2022	\$319,521
- Theater Arts Renovation	\$60,000	or			\$60,000	A/V, Lights, Rigging	2022	\$8,100
Site								
- Grading for New Construction		or			\$0	Site Prep for Classroom Addition	2023	\$0
- Drainage / Erosion	\$10,000	or			\$10,000	Regrade area near Main & 1st Grade Hall to prevent water intrusion	2019	\$0
- Landscaping / Grassing	\$5,000	or			\$5,000	Landscape Refresh	2022	\$675
- Landscaping / Grassing	\$2,500	or			\$2,500	Allowance: Remove "Dead" Trees in buffer area near student drop-off	2019	\$0
- Irrigation		or			\$0			
- Athletic Field(s) / Playground(s)	\$10,000	or			\$10,000	Allowance: Update and Repair Field / Hazardous	2019	\$0
- Athletic Field(s) / Playground(s)	\$10,000	or			\$10,000	Repave Track - Walking	2022	\$1,350
- Athletic / Playground Equipment		or			\$0			
- Parking Lot(s)	\$10,000	or			\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2019	\$0
- Driveway(s) / Turn lane(s)		or			\$0			
- Sidewalks		or			\$0			
- ADA		or			\$0			
- Fencing		or	100	\$18.00	\$1,800	Add Fencing Between Playground and Loading Dock	2019	\$0
- Fencing	\$10,000	or			\$10,000	Replace Privacy Fencing around Dumpster Pads	2020	\$450
- Site Lighting		or			\$0	Duke Power Owned System		
- Utilities		or			\$0			
-		or			\$0			
Building Envelope								
- Structural		or			\$0			
- Roof: Low Slope		or	15,496	\$10.00	\$154,960	Roofs New in 2004 - Per 20 Year Cycle	2024	\$34,866
- Roof: Metal		or			\$0	Roofs New in 2004 - Per 35 Year Cycle	2039	\$0
- Roof: Shingle		or			\$0			
- Exterior Walls		or			\$0			
- Exterior Doors		or			\$0			
- Storefronts / Window Walls		or			\$0			
- Windows		or			\$0			
-		or			\$0			
Building Finishes								
- Flooring: VCT / Vinyl		or			\$0			
- Flooring: Hard Tile / Terrazzo		or			\$0			
- Flooring: Sports Flooring		or			\$0			
- Ceiling: ACT		or			\$0			
- Walls: Painting		or	94,673	\$1.50	\$142,010	Per 7-Year Cycle (with 20 Year Renovation)	2022	\$19,171
- Walls: Other	\$20,000	or			\$20,000	Allowance: Sound Panels needed at Cafeteria and Gym	2022	\$2,700
- Casework		or			\$0			
- Interior Doors / Windows		or			\$0			
- ADA / Code Upgrades		or			\$0			
- Asbestos Abatement		or			\$0			
-		or			\$0			
Building Systems								
- Food Service	\$250,000	or			\$250,000	Replace Hood, Dish Washer, Cooler / Freezer	2022	\$33,750
- Food Service	\$85,000	or			\$85,000	Refresh Kitchen Equipment	2028	\$34,425
- Plumbing		or			\$0			
- Fire Sprinkler		or			\$0			
- HVAC		or	94,673	\$4.00	\$378,692	Replace Chillers (2) - Per 12 Year Cycle	2020	\$17,041
- HVAC		or	94,673	\$1.00	\$94,673	Boiler Replacement - Replaced 1 of 2 in 2017	2028	\$38,343
- HVAC		or	94,673	\$1.00	\$94,673	Boiler Replacement	2020	\$4,260
- HVAC		or	94,673	\$14.00	\$1,325,422	Replace AHUs	2022	\$178,932
- HVAC		or	94,673	\$3.50	\$331,356	Replace Controls	2022	\$44,733
- Electrical		or			\$0			
- Fire Alarm		or	94,673	\$2.50	\$236,683	Full System Replacement - Per 20 Year Cycle	2019	\$0
- Security: Cameras	\$56,250	or			\$56,250	Full System Replacement - Per 6 Year Cycle (Replaced 2018)	2022	\$7,594
- Security: Intrusion	\$5,494	or			\$5,494	Head End Replacement - Per 20 Year Cycle	2022	\$742
- Intercom		or	94,673	\$0.85	\$80,472	Full System Replacement - Per 20 Year Cycle	2019	\$0
- Access Controls	\$20,000	or			\$20,000	S2 Door Access	2022	\$2,700
Technology								
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle		
- UPS		or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or			\$0	Additional Drops		
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle		
-		or			\$0			
Facility Improvements Sub Total					\$5,761,809			
II B Support Costs								
Prof/Pm/Support Fees	10%				\$576,181		2021	\$51,856
Survey/Testing	1.5%				\$86,427		2022	\$11,668
Storage and Moving					\$0			
City Fees/County					\$0			
FF&E	3%				\$172,854	Allowance - Refresh	2022	\$23,335
Land Purchase					\$0			
Contingency	10%				\$576,181		2022	\$77,784
Support Costs Subtotal					\$1,411,643			
Program Subtotal					\$7,173,452			
Program Escalation					\$913,997			
Program Total					\$8,087,448			



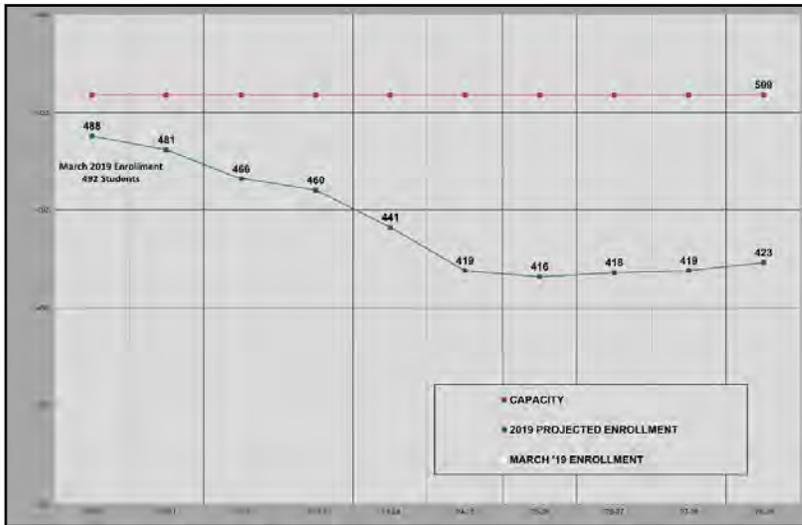
E.K. POWE ELEMENTARY

913 9TH STREET

- School #:** 363
- Building Size:** 99,384 Square Feet
- Grade Level:** K-5
- Year Built:** 1926, '50, '67, '91, '94, '01, '13
- Site Size:** 5.5 Acres

SUMMARY

Built in 1926, E.K Powe Elementary School is one of the older facilities in DPS' inventory. It has a student capacity of 509 students and its current enrollment is just under 100% at 492. The enrollment for Powe is expected to decrease over the next ten years with a low of 416 in 2025 before slightly increasing to 423 in 2028. The FCI is currently rated as good with a rating of 0.05 but will increase to critical by 2023 if current and deferred maintenance needs associated with roofing, HVAC, and a 20 year cycle renovation of 1994 building are not addressed.



Current Capacity: 509 Students

Current Enrollment: 492 Students
97%

Projected Enrollment: 423 Students
83%

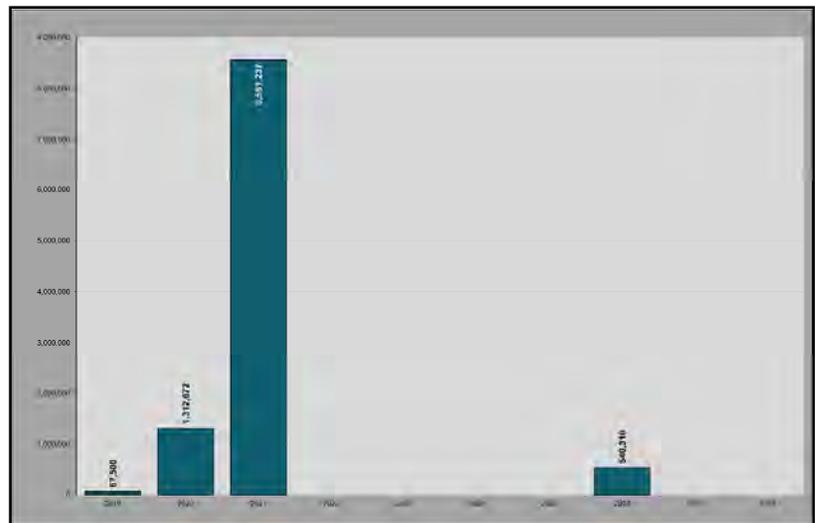
Square Feet per Student: 195.3 sf

Facility Condition Index: .35

New Construction: \$0

Current / Deferred Maintenance: \$10,481,720

Total Facility Needs: \$10,481,720



Durham Public Schools Capital Improvement Plan			E.K. Powe Elementary		492	Summary Sheet	
Category/Description	Campus Program Total		10,481,720		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction							
- Addition	or			\$0	Currently at 97% Occupancy Level and will decrease to 82%		
-	or			\$0			
Renovation							
- 20 Year Renovation	or	31,273	\$25.00	\$781,825	20-Year Cycle Renovation of 1994 Buildings	2021	\$70,364
- 20 Year Renovation	or			\$0	20 Year Renovation - 1926, 1966 Buildings (2012)	2032	\$0
- Security Vestibule	or			\$0	Develop Passive Security at Front Office (2019)		
- Theater Arts Renovation	or	\$60,000		\$60,000	A/V, Lights, Rigging	2021	\$5,400
Site							
- Grading for New Construction	or			\$0			
- Drainage / Erosion	or	\$10,000		\$10,000	Repair Retaining Wall at Steps	2019	\$0
- Drainage / Erosion	or	\$10,000		\$10,000	Allowance: Repair Drainage Issue at Courtyard	2019	\$0
- Drainage / Erosion	or	\$10,000		\$10,000	Allowance: Repair Drainage Issue at Playground	2019	\$0
- Landscaping / Grassing	or	\$5,000		\$5,000	Landscape Refresh	2021	\$450
- Irrigation	or			\$0			
- Athletic Field(s) / Playground(s)	or	\$7,500		\$7,500	Allowance: Repair Playground Surface	2019	\$0
- Athletic / Playground Equipment	or	\$125,000		\$125,000	Replace PG01 & PG02 Equipment. PG02 was complete in 2013.	2021	\$11,250
- Parking Lot(s)	or	\$10,000		\$10,000	Parking Lot Preventative Maintenance (Per 10 Year Cycle)	2019	\$0
- Driveway(s) / Turn Lane(s)	or			\$0			
- Sidewalks	or			\$0			
- ADA	or			\$0			
- Fencing	or			\$0			
- Site Lighting	or			\$0	Duke Power Owned System		
- Utilities	or			\$0			
-	or			\$0			
Building Envelope							
- Structural	or			\$0			
- Roof: Low Slope	or	\$235,888		\$235,888	Replace NE Addition (L, M, N, O, P) (2001)	2026	\$74,305
- Roof: Low Slope	or	\$363,854		\$363,854	Replace 1994 Addition and Courtyard Addition Roof	2020	\$16,373
- Roof: Low Slope	or	\$134,394		\$134,394	Replace Auditorium & Gym Roof (2001)	2026	\$42,334
- Roof: Metal	or	\$57,501		\$57,501	Replace F G Canopy Roofs, 1994 Corridor, Alum Canopy System	2020	\$2,988
- Roof: Metal	or	\$64,600		\$64,600	Replace 1994 Canopy Roofs	2020	\$2,907
- Roof: Shingle	or			\$0	Replace Original Building Roof (2013)	2033	\$0
- Exterior Walls	or			\$0			
- Exterior Doors	or			\$0			
- Storefronts / Window Walls	or			\$0			
- Windows	or	\$200,000		\$200,000	Replace Windows due to Moisture Issues - 1926, 1966 Buildings	2021	\$18,000
-	or			\$0			
Building Finishes							
- Flooring: VCT / Vinyl	or			\$0			
- Flooring: Hard Tile / Terrazzo	or			\$0			
- Flooring: Sports Flooring	or			\$0			
- Ceiling: ACT	or			\$0			
- Ceiling: Other	or			\$0			
- Walls: Painting	or	99,384	\$1.50	\$149,076	Per 7-Year Cycle	2021	\$13,417
- Walls: Other	or	99,384	\$0.75	\$74,538	Repair Blistered Paint due to Moisture Issues	2021	\$6,708
- Walls: Other	or	\$5,000		\$5,000	Auditorium Walls Need Repairs	2021	\$450
- Casework	or			\$0			
- Interior Doors / Windows	or			\$0			
- ADA / Code Upgrades	or	\$15,000		\$15,000	Upgrade Miscellaneous Building Items (Including Stage Access)	2021	\$1,350
- Asbestos Abatement	or	68,111	\$1.40	\$95,355	Pre 1989 CMU Walls	2021	\$8,582
- Other	or	300	\$200.00	\$60,000	Replace Auditorium Seating	2021	\$5,400
-	or			\$0			
Building Systems							
- Food Service	or			\$0	Replace Hood (2013)		
- Food Service	or	\$195,000		\$195,000	Replace Dish Washer, Cooler / Freezer, Refresh Kitchen Equipment	2021	\$17,550
- Plumbing	or	2	\$10,000.00	\$20,000	Replace Water Heaters (2) 125 Gal	2019	\$0
- Fire Sprinkler	or			\$0			
- HVAC	or	99,384		\$0	Replace Chiller - Per 12 Year Cycle (2017)	2029	\$0
- HVAC	or	99,384	\$2.00	\$198,768	Replace Boiler - Per 20 Year Cycle	2021	\$17,889
- HVAC	or	99,384	\$36.00	\$3,577,824	Replace Indoor Air Units (4 pipe System)	2021	\$322,004
- HVAC	or	99,384	\$3.00	\$298,152	Replace Controls - Per 20 Year Cycle	2021	\$26,834
- Electrical	or	50,000	\$1.50	\$75,000	Replace Balance of T12s to LED (50% Of School)	2021	\$6,750
- Electrical	or	31,273	\$15.00	\$469,095	Renovate Electrical System of Older Building	2021	\$42,219
- Fire Alarm	or	99,384	\$2.50	\$248,460	Full System Replacement - Per 20 Year Cycle	2021	\$22,361
- Security: Cameras	or	29	\$1,400.00	\$40,600	Upgrade Existing "Older" I.P. Cameras & Server	2026	\$12,789
- Security: Intrusion	or	99,384		\$0	Head End Replacement - Per 20 Year Cycle (2013)	2033	\$0
- Intercom	or	99,384	\$0.85	\$84,476	Full System Replacement - Per 20 Year Cycle	2021	\$7,603
- Access Controls	or	\$20,000		\$20,000	S2 Door Access	2021	\$1,800
Technology							
- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle		
- UPS	or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks	or			\$0	Additional Drops		
- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle		
-	or			\$0			
Facility Improvements Sub Total				\$7,701,907			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$770,191		2020	\$34,659
Survey/Testing	1.5%			\$115,529		2021	\$10,398
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3%			\$231,057	Allowance - Refresh	2021	\$20,795
Land Purchase				\$0			
Contingency	10%			\$770,191		2021	\$69,317
Support Costs Subtotal				\$1,886,967			
Program Subtotal				\$9,588,874			
Program Escalation				\$892,846			\$892,846
Program Total				\$10,481,720			



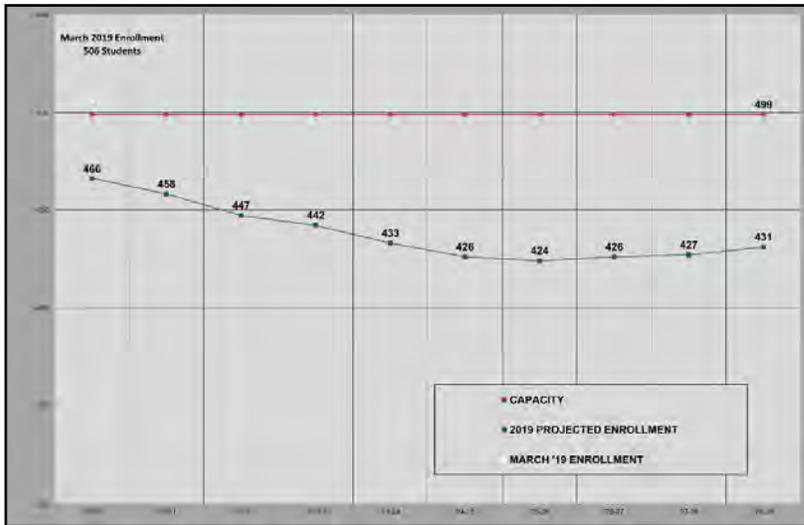
EASLEY ELEMENTARY

302 LEBANON CIRCLE

- School #:** 313
- Building Size:** 71,170 Square Feet
- Grade Level:** K-5
- Year Built:** 1989
- Site Size:** 18.9 Acres

SUMMARY

Built in 1989, Easley Elementary School received a major renovation in 2015 but some major building systems such as HVAC will be aging out over the next ten years and should be replaced. Overall, the FCI is scores in the fair range at 0.16. The enrollment currently just exceeds capacity but over the next ten years, it is expected that the student enrollment will decrease to 431 students in 2028, which is a reduction of 70 students and represents an occupancy percentage of 86%.



Current Capacity: 499 Students

Current Enrollment: 506 Students
101%

Projected Enrollment: 431 Students
86%

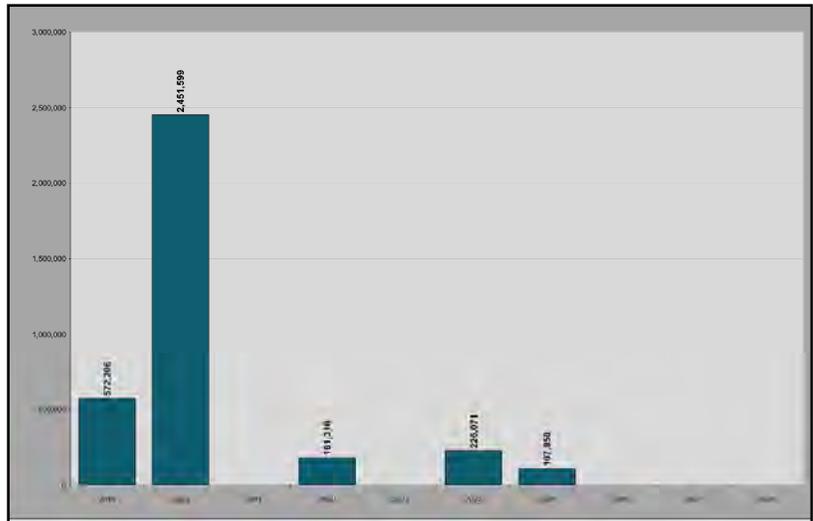
Square Feet per Student: 142.6 sf

Facility Condition Index: .16

New Construction: \$0

Current / Deferred Maintenance: \$3,534,399

Total Facility Needs: \$3,534,399



Durham Public Schools			Easley Elementary		School 313		Summary Sheet	
Capital Improvement Plan			Campus Program Total		\$ 3,545,399			
Category/Description	Campus Program Total		\$ 3,545,399		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A	Facility Improvements:							
	New Construction							
	- Addition	or		\$0	Currently at 101% Occupancy Level but will reduce to 86%			
	-	or		\$0				
	Renovation							
	- 20-Year Renovation	or	71,170	\$0	20-Year Cycle (2015)	2035	\$0	
	- Theater Arts Renovation	\$60,000	or	\$60,000	A/V, Lights, Rigging	2022	\$8,100	
	Site							
	- Grading for New Construction	or		\$0				
	- Drainage / Erosion	\$25,000	or	\$25,000	Drainage Improvements at Residential Area / Buffer	2019	\$0	
	- Landscaping / Grassing	\$5,000	or	\$5,000	Landscape Refresh	2019	\$0	
	- Irrigation	or		\$0				
	- Athletic Field(s) / Playground(s)	\$5,000	or	\$5,000	Allowance: Separation and Cupping in Mats (2019)	2019	\$0	
	- Athletic / Playground Equipment	or		\$0				
	- Parking Lot(s)	or	2,500	\$100.00	Asphalt Overlay of Balance of Bus / Existing Parking Lot and Drive	2020	\$11,250	
	- Parking Lot(s)	\$10,000	or	\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2020	\$450	
	- Driveway(s) / Turn lane(s)	\$7,500	or	\$7,500	Investigate Address Stacking Space (Cars backup into street)	2019	\$0	
	- Sidewalks	\$20,000	or	\$20,000	Add ADA Sidewalk to Playground (Need Switchbacks)	2019	\$0	
	- ADA	or		\$0				
	- Fencing	or		\$0				
	- Site Lighting	\$15,000	or	\$15,000	DPS Owned, Convert to LED (Lots are dark)	2020	\$675	
	- Utilities	or		\$0				
	-	or		\$0				
	Building Envelope							
	- Structural	or		\$0				
	- Roof: Low Slope	or		\$0	Main Building Roof Replaced in 2009 - Per 20 Year Cycle	2029	\$0	
	- Roof: Metal	or		\$0	Media Center Roof Replaced in 2009 - Per 35 Year Cycle	2044	\$0	
	- Roof: Shingle	or		\$0				
	- Exterior Walls	or		\$0				
	- Exterior Doors	or		\$0				
	- Storefronts / Window Walls	or		\$0				
	- Windows	or		\$0				
	-	or		\$0				
	Building Finishes							
	- Flooring: VCT / Vinyl	or		\$0				
	- Flooring: Hard Tile / Terrazzo	or		\$0				
	- Flooring: Sports Flooring	or		\$0				
	- Ceiling: ACT	or		\$0				
	- Ceiling: Other	or		\$0				
	- Walls: Painting	or	71,170	\$1.75	Per 7-Year Cycle	2024	\$26,028	
	- Walls: Other	or		\$0				
	- Casework	or		\$0				
	- Interior Doors / Windows	or		\$0				
	- ADA / Code Upgrades	or		\$0				
	- Asbestos Abatement	or	71,170	\$0	Pre 1989 CMU Walls	2035	\$0	
	- Bleachers	or	300	\$220.00	Replace Bleachers	2020	\$2,970	
	-	or		\$0				
	Building Systems							
	- Food Service	or		\$0	Replace Hood & Freezer / Cooler (2015)	2035	\$0	
	- Food Service	\$85,000	or	\$85,000	Replace Dish Washer, Kitchen Equipmen	2025	\$22,950	
	- Plumbing	or	2	\$30,000.00	Replace Water Heaters (2) 225 Gal	2020	\$2,700	
	- Plumbing	or	10	\$500.00	Replace Hose Bibs	2020	\$225	
	- Fire Sprinkler	or		\$0				
	- HVAC	or	71,170	\$4.00	Replace Chiller	2020	\$12,811	
	- HVAC	or	71,170	\$2.00	Replace Boilers (2)	2020	\$6,405	
	- HVAC	or	71,170	\$12.00	Replace AHUs (Have to run dehumidifiers in Media	2020	\$38,432	
	- HVAC	or	71,170	\$3.50	Replace Controls (Temp Variations)	2020	\$11,209	
	- Electrical	or	66,500	\$1.50	Replace Balance of T8s to LED	2022	\$13,466	
	- Fire Alarm	or	71,170	\$2.50	Replace System - Per 20 Year Cycle	2019	\$0	
	- Security: Cameras	\$60,000	or	\$60,000	Full System Replacement - Per 6-Year Cycle (Replaced 2018)	2024	\$13,500	
	- Security: Intruder	\$7,408	or	\$7,408	Full System Replacement - Per 20 - Year Cycle	2019	\$0	
	- Intercom	or	71,170	\$0.85	Full System Replacement - Per 20 - Year Cycle	2019	\$0	
	- Access Controls	\$20,000	or	\$20,000	S2 Door Access	2020	\$900	
	-	or		\$0				
	Technology							
	- Route / Switch Equipment	or		\$0	Replace - Per 5 Year Cycle			
	- UPS	or		\$0	Replace - Per 5 Year Cycle			
	- Wireless Access Points	or		\$0	Replace - Per 5 Year Cycle			
	- VOIP Phones System	or		\$0	Replace - Per 10 Year Cycle			
	- Data Cabling / Racks	or		\$0	Additional Drops			
	- Classroom A/V	or		\$0	Replace - Per 5 Year Cycle			
	-	or		\$0				
	Facility Improvements Sub Total				\$2,693,780			
	III B Support Costs							
	Prof/Pm/Support Fees	10%		\$269,378		2019	\$0	
	Survey/Testing	1.5%		\$40,407		2020	\$1,818	
	Storage and Moving			\$0				
	City Fees/County			\$0				
	FF&E	3%		\$80,813	Allowance - Refresh	2020	\$3,637	
	Land Purchase			\$0				
	Contingency	10%		\$269,378		2020	\$12,122	
	Support Costs Subtotal				\$659,976			
	Program Subtotal				\$3,353,756			
	Program Escalation				\$191,643			\$191,643
	Program Total				\$3,545,399			



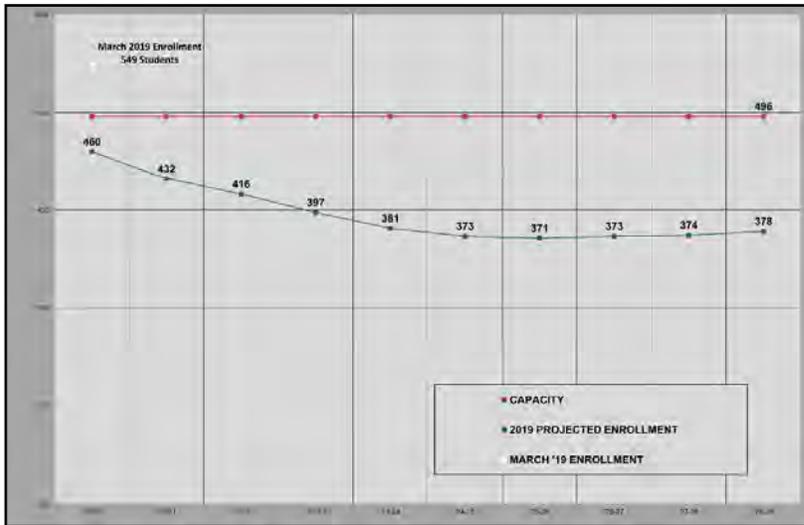
EASTWAY ELEMENTARY

610 ALSTON AVENUE

- School #:** 310
- Building Size:** 78,000 Square Feet
- Grade Level:** PK-5
- Year Built:** 1995
- Site Size:** 14.5 Acres

SUMMARY

Eastway Elementary School was built in 1995 and is over capacity by 11% but enrollment is projected to reduce over the next ten years with the equilibrium without mobile units taking place in 2024. In 2028 the student enrollment is forecasted to be 378 which is an occupancy percentage of 76%. The FCI score is in the poor range and will reach the critical stage in 2025 if DPS does not address the 1994 addition roof as well as campus wide 20 year cycle renovation and HVAC replacement.



Current Capacity: 496 Students

Current Enrollment: 549 Students
111%

Projected Enrollment: 378 Students
76%

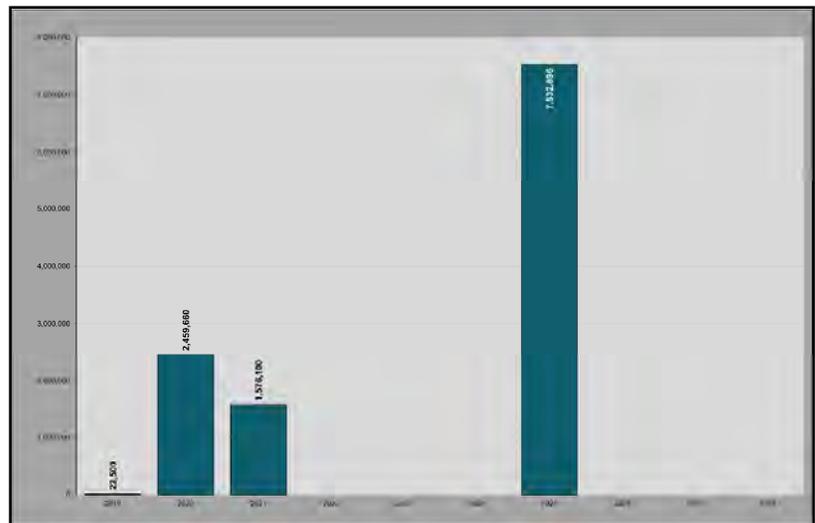
Square Feet per Student: 157.3 sf

Facility Condition Index: .49

New Construction: \$0

Current / Deferred Maintenance: \$11,591,156

Total Facility Needs: \$11,591,156



Durham Public Schools Capital Improvement Plan			Eastway Elementary		School 310	Summary Sheet	
Category/Description	Campus Program Total		\$ 11,591,156		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A	Facility Improvements:						
	New Construction						
- Addition	or			\$0	Currently at 111% Occupancy Level but will reduce to 76%		
-	or			\$0	Currently Has Five (5) Mobile Units But Will Not Need To Converted To Classrooms		
	Renovation						
- 20-Year Cycle	or	78,000	\$25.00	\$1,950,000	20-Year Cycle (1995)	2025	\$526,500
- Security Vestibule	or			\$0	Develop Passive Security at Front Office (2019)		
- Theater Arts Renovation	or	\$60,000		\$60,000	A/V, Lights, Rigging	2025	\$16,200
	Site						
- Grading for New Construction	or			\$0			
- Drainage / Erosion	or			\$0			
- Utilities	or			\$0			
- Landscaping / Grassing	or	\$5,000		\$5,000	Landscape Refresh	2021	\$450
- Irrigation	or			\$0			
- Athletic Field(s) / Playground(s)	or			\$0	Playground Re-surface (2014)		
- Athletic / Playground Equipment	or			\$0			
- Parking Lot(s)	or	35,000	\$2.00	\$70,000	Resurface Asphalt of Existing Parking Lot	2021	\$6,300
- Driveway(s) / Turn lane(s)	or	\$200,000		\$200,000	Installation of 400ft Turn Lane	2021	\$18,000
- Driveway(s) / Turn lane(s)	or	\$7,500		\$7,500	Allowance: Low Spot in Drive of Small Parking Lot	2019	\$0
- Sidewalks	or			\$0			
- ADA	or			\$0			
- Fencing	or			\$0			
- Site Lighting	or	\$15,000		\$15,000	DPS Owned, Convert to LED	2021	\$1,350
- Utilities	or			\$0			
	Building Envelope						
- Structural	or			\$0			
- Roof: Low Slope	or	\$1,326,818		\$1,326,818	Replace Main Building Roof (1994)	2020	\$59,707
- Roof: Metal	or	\$126,500		\$126,500	Replace Entry	2020	\$5,693
- Roof: Shingle	or			\$0			
- Exterior Walls	or			\$0			
- Exterior Doors	or			\$0			
- Storefronts / Window Walls	or			\$0			
- Windows	or			\$0			
	Building Finishes						
- Flooring: VCT / Vinyl	or			\$0			
- Flooring: Hard Tile / Terrazzo	or			\$0			
- Flooring: Sports Flooring	or			\$0			
- Ceiling: ACT	or			\$0			
- Ceiling: Other	or			\$0			
- Walls: Painting	or	78,000	\$1.50	\$117,000	Per 7-Year Cycle	2020	\$5,265
- Walls: Other	or			\$0	Restroom Walls Need to be Replaced / Repaired (with 20 Year Reno)		
- Casework	or			\$0			
- Interior Doors / Windows	or			\$0			
- ADA / Code Upgrades	or			\$0			
- Asbestos Abatement	or			\$0			
	Building Systems						
- Food Service	or	\$250,000		\$250,000	Replace Hood & Cooler / Freezer	2025	\$67,500
- Food Service Equipment	or	\$85,000		\$85,000	Equipment Provided by CNS (Refresh)	2025	\$22,950
- Plumbing	or		2	\$10,000.00	Replace Water Heaters (2) 125 Gal	2025	\$5,400
- Plumbing	or		6	\$500.00	Replace Hose Bibs	2025	\$810
- Fire Sprinkler	or			\$0			
- HVAC	or	78,000		\$0	Replace Chiller - Per 12 Year Cycle (2019)	2031	\$0
- HVAC	or	78,000	\$2.00	\$156,000	Replace Boiler - Per 20 Year Cycle	2025	\$42,120
- HVAC	or	78,000	\$40.00	\$3,120,000	Replace AHUs and convert from 2 pipe to 4 pipe	2025	\$842,400
- HVAC	or	78,000		\$0	Replace Controls - Per 20 Year Cycle (2016)	2036	\$0
- Electrical	or			\$0			
- Fire Alarm	or	78,000	\$2.50	\$195,000	Full System Replacement - Per 20 Year Cycle	2025	\$52,650
- Fire Alarm	or	\$15,000		\$15,000	Add FA System at Mobile Units	2019	\$0
- Security: Cameras	or	\$56,250		\$56,250	Full System Replacement - Per 6 Year Cycle (Replaced 2018)	2025	\$15,188
- Security: Intrusion	or	\$6,164		\$6,164	Full System Replacement - Per 20 Year Cycle	2025	\$1,664
- Intercom	or	\$30,000		\$30,000	Full System Replacement - Per 20 Year Cycle	2025	\$8,100
- Access Controls	or	\$20,000		\$20,000	S2 Door Access	2021	\$1,800
	Technology						
- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle		
- UPS	or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks	or			\$0	Additional Drops		
- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle		
				\$0			
	Facility Improvements Sub Total				\$7,834,232		
II B	Support Costs						
Prof/Pm/Support Fees	10%			\$783,423		2020	\$35,254
Survey/Testing	1.5%			\$117,513		2021	\$10,576
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3%			\$235,027	Allowance - Refresh	2021	\$21,152
Land Purchase				\$0			
Contingency	10%			\$783,423		2021	\$70,508
	Support Costs Subtotal				\$1,919,387		
	Program Subtotal				\$9,753,619		
	Program Escalation				\$1,837,537		\$1,837,537
	Program Total				\$11,591,156		



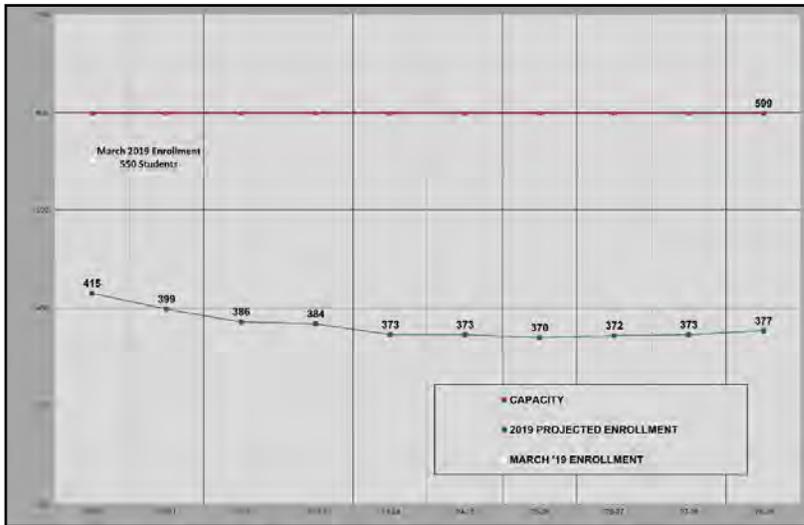
ENO VALLEY ELEMENTARY

117 MILTON ROAD

- School #:** 315
- Building Size:** 88,550 Square Feet
- Grade Level:** PK-5
- Year Built:** 1977, '93
- Site Size:** 62.3 Acres

SUMMARY

Eno Valley Elementary School is currently undergoing a major renovation which includes enclosing the exterior walkways for increased security. Over the next ten years, maintenance needs for the facility will remain but will be relatively minor as the FCI of 0.02 suggests. The facility currently is at 92% capacity but student enrollment is expected to decline over the next 10 years from the current level of 550 students to 377 in 2028, which represents a 63% occupancy level.



Current Capacity: 599 Students

Current Enrollment: 550 Students
92%

Projected Enrollment: 377 Students
63%

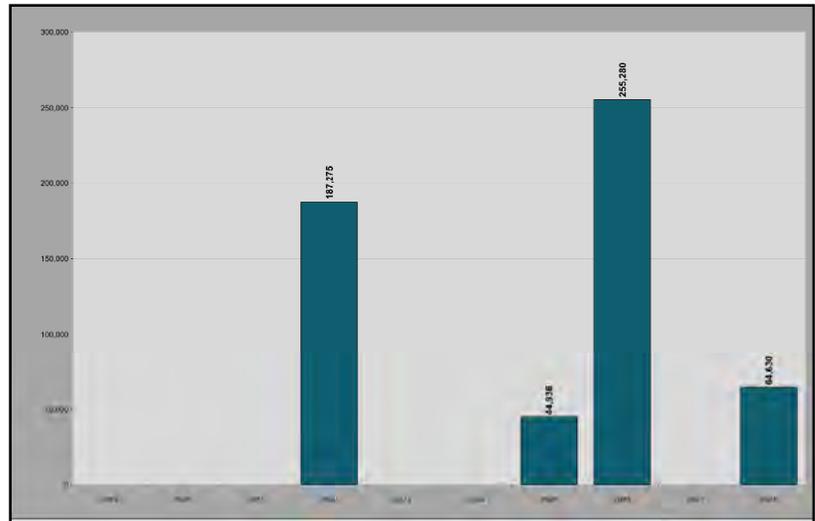
Square Feet per Student: 124.5 sf

Facility Condition Index: .02

New Construction: \$0

Current / Deferred Maintenance: \$552,121

Total Facility Needs: \$552,121



Durham Public Schools Capital Improvement Plan			Eno Valley Elementary		School 315	Summary Sheet		
Category/Description	Campus Program Total		\$ 552,121		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A	Facility Improvements:							
	New Construction							
	- Addition	or		\$0	Currently at 92% Occupancy Level but will reduce to 63%			
	Renovation							
	- 20 Year Renovation	or	88,550	\$0	20 Year Renovation (2019)	2039	\$0	
	- Theater Arts Renovation	or		\$0	A/V, Lights, Rigging (2019)			
	Site							
	- Grading for New Construction	or		\$0				
	- Drainage / Erosion	or		\$0				
	- Landscaping / Grassing	or		\$0	Landscape Refresh	2039	\$0	
	- Irrigation	or		\$0				
	- Athletic Field(s) / Playground(s)	or	\$120,000	\$120,000	Replace K-2 / 3-5 Equipment	2022	\$16,200	
	- Athletic Field(s) / Playground(s)	or	\$25,000	\$25,000	Refresh 3-5 Equipment	2022	\$3,375	
	- Athletic / Playground Equipment	or		\$0				
	- Parking Lot(s)	or	\$10,000	\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2028	\$4,050	
	- Driveway(s) / Turn lane(s)	or		\$0				
	- Sidewalks	or		\$0				
	- ADA	or		\$0				
	- Fencing	or		\$0				
	- Site Lighting	or		\$0	Duke Owned System			
	- Utilities	or		\$0				
	-	or		\$0				
	Building Envelope							
	- Structural	or		\$0				
	- Roof: Low Slope	or		\$0	Replace Gym Roof (2019)	2039	\$0	
	- Roof: Low Slope	or		\$0	Replace Front Classroom, Back Classroom, Mech Rms, Caf�, Canopies	2039	\$0	
	- Roof: Metal	or		\$0				
	- Roof: Shingle	or		\$0				
	- Exterior Walls	or		\$0				
	- Exterior Doors	or		\$0				
	- Storefronts / Window Walls	or		\$0				
	- Windows	or		\$0				
	-	or		\$0				
	Building Finishes							
	- Flooring: VCT / Vinyl	or	12,000	\$3.00	\$36,000	D Wing	2028	\$14,580
	- Flooring: Hard Tile / Terrazzo	or			\$0			
	- Flooring: Sports Flooring	or			\$0			
	- Ceiling: ACT	or			\$0			
	- Ceiling: Other	or			\$0			
	- Walls: Painting	or	88,550	\$1.50	\$132,825	Per 7-Year Cycle	2026	\$41,840
	- Walls: Other	or			\$0			
	- Casework	or			\$0			
	- Interior Doors / Windows	or			\$0			
	- ADA / Code Upgrades	or			\$0			
	- Asbestos Abatement	or			\$0			
	-	or			\$0			
	Building Systems							
	- Food Service	or			\$0	Cooler/Freezer (2019)		
	- Plumbing	or			\$0	Replace fixtures in 1970's Buildings (2019)		
	- Fire Sprinkler	or			\$0	Install Sprinkler System (2019)		
	- HVAC	or	12,500		\$0	Replace HVAC System (RTUs), D, Caf�, & Admin Buildings (2013)	2033	\$0
	- HVAC	or			\$0	Replace HVAC System (RTUs), Media, B & C Building (2019)	2039	\$0
	- HVAC	or			\$0	Replace HVAC System (RTUs), Gym (2019)	2039	\$0
	- HVAC	or			\$0	Replace HVAC System / Add System for New Enclosed Corridors (2018)	2039	\$0
	- HVAC	or			\$0	Replaced Controls (2018)	2039	\$0
	- Electrical	or			\$0	Replaced Service Breakers (2019)		
	- Electrical	or			\$0	LED Lighting Upgrades (2018)		
	- Fire Alarm	or			\$0	Full System Replacement - Per 20 Year Cycle (2019)	2039	\$0
	- Security: Cameras	or			\$0	Full System Replacement - Per 6 Year Cycle (2018)	2024	\$0
	- Security: Intrusion	or	\$10,000		\$10,000	Head End Replacement - Per 20 Year Cycle	2026	\$3,150
	- Intercom	or			\$0	Full System Replacement - Per 20 Year Cycle (2019)	2039	\$0
	- Access Controls	or	\$20,000		\$20,000	S2 Door Access	2022	\$2,700
	Technology							
	- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle		
	- UPS	or			\$0	Replace - Per 5 Year Cycle		
	- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle		
	- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle		
	- Data Cabling / Racks	or			\$0	Additional Drops		
	- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle		
	-	or			\$0			
	Facility Improvements Sub Total				\$353,825			
II B	Support Costs							
	Prof/Pm/Support Fees	10%			\$35,383		2025	\$9,553
	Survey/Testing	1.5%			\$5,307		2026	\$1,672
	Storage and Moving				\$0			
	City Fees/County				\$0			
	FF&E	3%			\$10,615	Allowance - Refresh	2026	\$3,344
	Land Purchase				\$0			
	Contingency	10%			\$35,383		2026	\$11,145
	Support Costs Subtotal				\$86,687			
	Program Subtotal				\$440,512			
	Program Escalation				\$111,609			\$111,609
	Program Total				\$552,121			



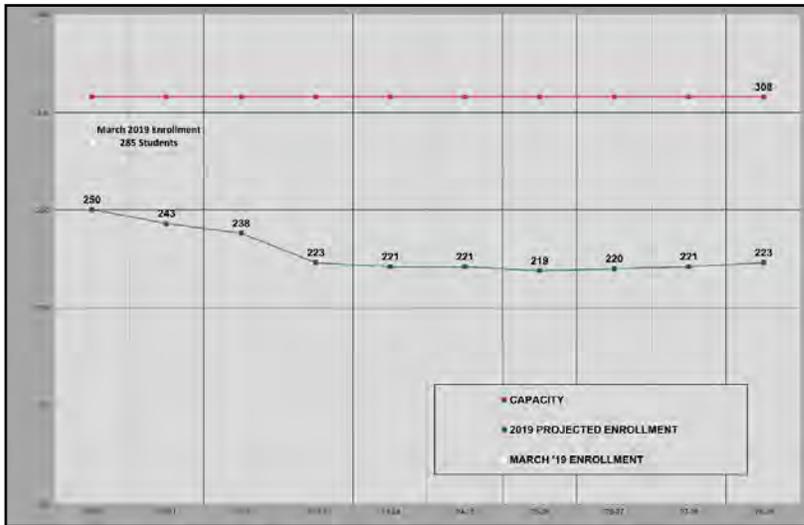
FAYETTEVILLE ST. ELEMENTARY

2905 FAYETTEVILLE STREET

School #: 344
Building Size: 62,797 Square Feet
Grade Level: PK-5
Year Built: 1959, '60, '61, '08
Site Size: 7.9 Acres

SUMMARY

Fayetteville Street Elementary was originally built in 1977 and has had two additions since, the most recent being in 2003 when a 25,000 square foot addition was added and in 2008 when major renovation took place. The major work requirements over the next ten years include roofing, HVAC, and 20 year cycle renovations. The facility has a student capacity of 308 students which is low in proportion to the overall square footage and has a current enrollment of 285 students. It is anticipated that by 2028, the student population will decrease to an occupancy level of 72%.



Current Capacity: 308 Students

Current Enrollment: 285 Students
93%

Projected Enrollment: 223 Students
72%

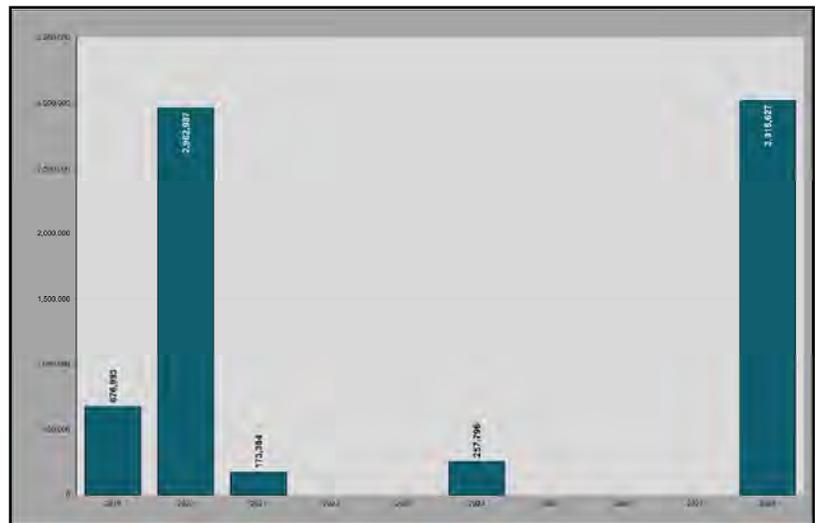
Square Feet per Student: 203.9 sf

Facility Condition Index: .30

New Construction: \$0

Current / Deferred Maintenance: \$7,089,786

Total Facility Needs: \$7,089,786



Durham Public Schools Capital Improvement Plan			Fayetteville Street Elementary		School 344	Summary Sheet		
Category/Description	Campus Program Total		\$ 7,181,196		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A	Facility Improvements:							
	New Construction							
- Addition		or		\$0	Currently at 83% Occupancy Level but will reduce to 72%			
-		or		\$0				
	Renovation							
- 20 Year Renovation		or	62,797	\$25.00	\$1,569,925	Per 20 Year Cycle (2008)	2028	\$635,820
- 20 Year Renovation	\$250,000	or			\$250,000	Allowance: Renovate Kitchen (Plumbing in Bad Shape)	2019	\$0
- Security Vestibule	\$70,750	or			\$70,750	Develop Passive Security at Front Office	2019	\$0
- Theater Arts Renovation	\$60,000	or			\$60,000	A/V. Lights, Rigging	2024	\$13,500
	Site							
- Grading for New Construction		or			\$0			
- Drainage / Erosion	\$25,000	or			\$25,000	Correct Site Drainage Issues & Downspouts	2019	\$0
- Drainage / Erosion	\$15,000	or			\$15,000	Water Intrusion along Cafeteria Wall	2019	\$0
- Landscaping / Grassing	\$5,000	or			\$5,000	Landscape Refresh	2019	\$0
- Irrigation		or			\$0			
- Athletic Field(s) / Playground(s)	\$125,000	or			\$125,000	Allowance: Replace Playground (Currently Condemned)	2019	\$0
- Athletic / Playground Equipment		or			\$0			
- Parking Lot(s)	\$75,000	or			\$75,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle (Resurface)	2019	\$0
- Driveway(s) / Turn Lane(s)		or			\$0			
- Sidewalks	\$7,500	or			\$7,500	Allowance: Broken Sidewalk - Street Side & Back of School	2019	\$0
- ADA	\$7,500	or			\$7,500	Playground ADA Access	2019	\$0
- Fencing		or			\$0			
- Site Lighting		or			\$0	Duke Energy Owned System		
- Utilities		or			\$0			
	Building Envelope							
- Structural		or			\$0			
- Roof: Low Slope	\$620,485	or			\$620,485	Replace Main Building (Needed in 2019 but can't complete till 2020 or 21)	2020	\$27,922
- Roof: Low Slope		or			\$0	Replace Gym Roofs (Needed in 2019 but can't complete till 2020 or 21)	2020	\$0
- Roof: Low Slope	\$6,845	or			\$6,845	Replace Elevator Addition Roof (Needed in 2019 but can't complete till 2020 or 21)	2020	\$308
- Roof: Metal		or			\$0			
- Roof: Shingle		or			\$0			
- Exterior Walls		or			\$0			
- Exterior Doors		or			\$0			
- Storefronts / Window Walls		or			\$0			
- Windows		or			\$0			
-		or			\$0			
	Building Finishes							
- Flooring: VCT / Vinyl		or	5,000	\$12.00	\$60,000	Replace Auditorium Floor	2021	\$5,400
- Flooring: Hard Tile / Terrazzo		or			\$0			
- Flooring: Sports Flooring		or			\$0			
- Ceiling: ACT		or			\$0			
- Ceiling: Other		or			\$0			
- Walls: Painting		or	62,797	\$1.50	\$94,196	Per 7-Year Cycle	2021	\$8,478
- Walls: Other		or			\$0			
- Casework		or			\$0			
- Interior Doors / Windows		or			\$0			
- ADA / Code Upgrades	\$10,000	or			\$10,000	Upgrade Miscellaneous Building Items	2019	\$0
- Asbestos Abatement		or	62,797	\$1.50	\$94,196	Pre 1989 CMU Walls	2028	\$38,149
-		or			\$0			
	Building Systems							
- Food Service		or			\$0	Replaced in 2009	2039	\$0
- Plumbing		or	1	\$10,000.00	\$10,000	Replace Water Heaters (1) 125 Gal	2020	\$450
- Fire Sprinkler		or			\$0			
- HVAC		or	62,797	\$4.00	\$251,188	Replace Chiller - Per 12 Year Cycle	2020	\$11,303
- HVAC		or	62,797	\$2.00	\$125,594	Replace Boilers - Per 20 Year Cycle	2020	\$5,652
- HVAC		or	62,797	\$14.00	\$879,158	Replace AHUs	2020	\$39,562
- HVAC		or	62,797	\$3.50	\$219,790	Replace Controls - Per 20 Year Cycle	2020	\$9,891
- HVAC		or			\$0	Replace Chiller Controls - Per 20 Year Cycle (2013)	2023	\$0
- Electrical		or	62,797	\$1.50	\$94,196	Replace Balance of TBs to LED	2024	\$21,194
- Fire Alarm		or	62,797	\$2.50	\$156,993	Full System Replacement - Per 20 - Year Cycle	2019	\$0
- Security: Cameras	\$56,250	or			\$56,250	Full System Replacement - Per 8 -Year Cycle (Replaced 2018)	2024	\$12,656
- Security: Intrusion	\$4,872	or			\$4,872	Full System Replacement - Per 20 -Year Cycle	2021	\$438
- Intercom		or	62,797		\$0	Full System Replacement - Per 20 - Year Cycle	2021	\$0
- Access Controls	\$20,000	or			\$20,000	S2 Door Access	2020	\$900
-		or			\$0			
	Technology							
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle		
- UPS		or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or			\$0	Additional Drops		
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle		
-		or			\$0			
	Facility Improvements Sub Total				\$4,914,436			
II B	Support Costs							
Prof/Pm/Support Fees	10%				\$491,444		2020	\$22,115
Survey/Testing	1.5%				\$73,717		2020	\$3,317
Storage and Moving					\$0			
City Fees/County					\$0			
FF&E	3%				\$147,433	Allowance - Refresh	2020	\$6,634
Land Purchase					\$0			
Contingency	10%				\$491,444		2028	\$199,035
	Support Costs Subtotal				\$1,204,037			
	Program Subtotal				\$6,118,472			
	Program Escalation				\$1,062,724			\$1,062,724
	Program Total				\$7,181,196			



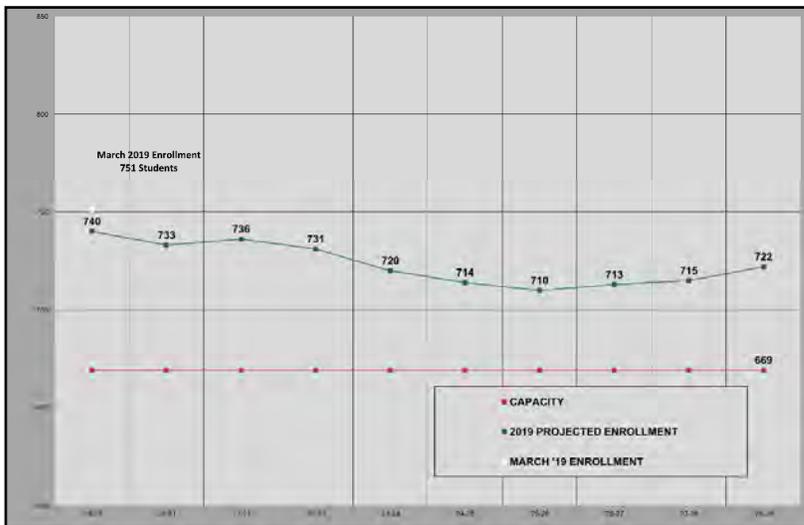
FOREST VIEW ELEMENTARY

3007 MT. SINAI ROAD

- School #:** 332
- Building Size:** 85,890 Square Feet
- Grade Level:** K-5
- Year Built:** 1993
- Site Size:** 21.9 Acres

SUMMARY

The student enrollment is forecasted to decline from 751 students to 722 by 2028, but this decline still represents an over crowded condition (by 53 students). The excess enrollment can be handled with either a classroom addition or by relief via new Elementary School C which is proposed to come online for the 2023 school year. The FCI will stay low through 2025 but will spike due to the projected maintenance needs associated with a 20 year cycle renovation, HVAC systems upgrades, and food service equipment replacement.



Current Capacity: 669 Students

Current Enrollment: 751 Students
112%

Projected Enrollment: 722 Students
108%

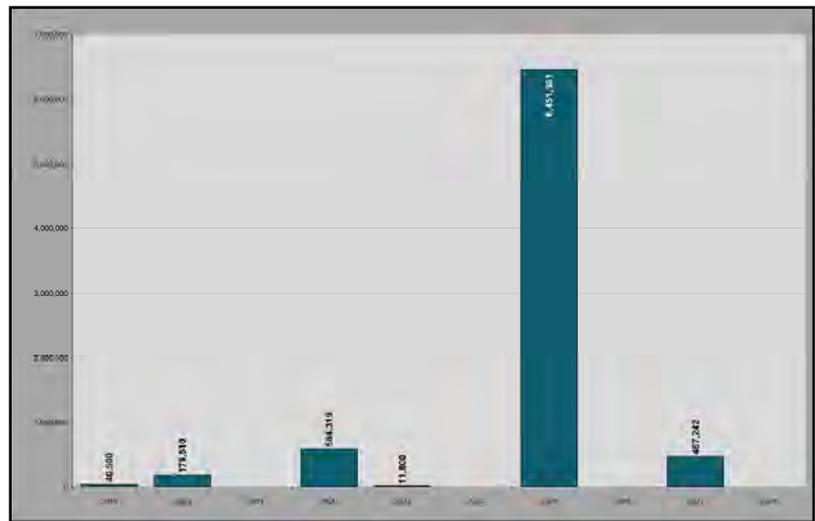
Square Feet per Student: 128.4 sf

Facility Condition Index: .24

New Construction: \$0

Current / Deferred Maintenance: \$7,734,751

Total Facility Needs: \$7,734,751



Durham Public Schools Capital Improvement Plan			Forest View Elementary		School 332	Summary Sheet		
Category/Description	Campus Program Total		\$ 7,734,751		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A	Facility Improvements:							
	New Construction				Mobile Project (6) Currently Underway (\$1.2mm)			
	- Addition	or		\$0	Currently at 112% Occupancy Level but will reduce to 108%			
	- Addition	or	4,000	\$0	Four (4) Classroom Addition Needed if ES C is not built	2023	\$0	
	-	or		\$0				
	Renovation							
	- 20 Year Renovations	or	85,890	\$25.00	\$2,147,250	20 - Year Cycle Renovation (1993)	2025	\$579,758
	- Theater Arts Renovation	or	\$60,000		\$60,000	A/V, Lights, Rigging	2025	\$16,200
	Site							
	- Grading for New Construction	or			\$0	Site Prep for Classroom Addition	2023	\$0
	- Drainage / Erosion	or			\$0			
	- Landscaping / Grassing	or	\$5,000		\$5,000	Landscape Refresh	2025	\$1,350
	- Irrigation	or			\$0			
	- Athletic Field(s) / Playground(s)	or	\$15,000		\$15,000	Silt from Hill Washes onto Playground	2019	\$0
	- Athletic / Playground Equipment	or			\$0			
	- Parking Lot(s)	or	\$10,000		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2023	\$1,800
	- Driveway(s) / Turn lane(s)	or			\$0			
	- Sidewalks	or			\$0			
	- ADA	or	\$7,500		\$7,500	Playground ADA Access	2019	\$0
	- Fencing	or	750	\$24.00	\$18,000	Add Fencing Around Playground & Mobile Unit	2019	\$0
	- Site Lighting	or	\$15,000		\$15,000	DPS Owned System, Convert to LED	2025	\$4,050
	- Utilities	or			\$0			
	-	or			\$0			
	Building Envelope							
	- Structural	or			\$0			
	- Roof, Low Slope	or			\$0	Replace Roof - Per 20 Year Cycle (2017)	2037	\$0
	- Roof, Metal	or			\$0			
	- Roof, Shingle	or			\$0			
	- Exterior Walls	or			\$0			
	- Exterior Doors	or			\$0			
	- Storefronts / Window Walls	or			\$0			
	- Windows	or			\$0			
	-	or			\$0			
	Building Finishes							
	- Flooring, VCT / Vinyl	or			\$0			
	- Flooring, Hard Tile / Terrazzo	or			\$0			
	- Flooring, Sports Flooring	or			\$0			
	- Ceiling, ACT	or			\$0			
	- Ceiling, Other	or			\$0			
	- Walls, Painting	or	85,890	\$1.50	\$128,835	Per 7-Year Cycle	2025	\$34,785
	- Walls, Other	or			\$0			
	- Casework	or			\$0			
	- Interior Doors / Windows	or			\$0			
	- ADA / Code Upgrades	or			\$0			
	- Asbestos Abatement	or			\$0			
	-	or			\$0			
	Building Systems							
	- Food Service	or	\$250,000		\$250,000	Replace Hood, Dish Washer, Cooler / Freezer, Steamer	2025	\$67,500
	- Food Service	or	\$85,000		\$85,000	Refresh Kitchen Equipment	2025	\$22,950
	- Plumbing	or			\$0			
	- Fire Sprinkler	or			\$0			
	- HVAC	or	85,890	\$4.00	\$343,560	Replace Chiller - Per 12 Year Cycle (2015)	2027	\$123,682
	- HVAC	or	85,890	\$2.00	\$171,780	Replace Boiler	2020	\$7,730
	- HVAC	or	85,890	\$14.00	\$1,202,460	Replace AHUs (4 Pipe System)	2025	\$324,664
	- HVAC	or	85,890	\$3.50	\$300,615	Replace Controls	2025	\$81,166
	- Electrical	or	80,000	\$1.50	\$120,000	Replace Balance of T12s to LED	2025	\$32,400
	- Electrical	or			\$0			
	- Fire Alarm	or			\$0	Replace System - Per 20 Year Cycle (2015)	2035	\$0
	- Security: Cameras	or	33	\$1,250.00	\$41,250	Upgrade Existing "Older" I.P. Cameras & Server	2025	\$11,138
	- Security: Intrusion	or	\$6,931		\$6,931	Full System Replacement - Per 20 Year Cycle	2025	\$1,871
	- Intercom	or			\$0	Full System Replacement - Per 20 Year Cycle (2015)	2035	\$0
	- Access Controls	or	\$20,000		\$20,000	S2 Door Access (Survey)	2022	\$2,700
	Technology							
	- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle		
	- UPS	or			\$0	Replace - Per 5 Year Cycle		
	- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle		
	- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle		
	- Data Cabling / Racks	or			\$0	Additional Drops		
	- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle		
	-	or			\$0			
	Facility Improvements Sub Total				\$4,948,181			
II B	Support Costs							
	Prof/Pm/Support Fees		10%		\$494,818		2022	\$66,800
	Survey/Testing		1.5%		\$74,223		2025	\$20,040
	Storage and Moving				\$0			
	City Fees/County				\$0			
	FF&E		3%		\$148,445	Allowance - Refresh	2025	\$40,080
	Land Purchase				\$0			
	Contingency		10%		\$494,818		2025	\$133,601
	Support Costs Subtotal				\$1,212,304			
	Program Subtotal				\$6,160,485			
	Program Escalation				\$1,574,265			\$1,574,265
	Program Total				\$7,734,751			



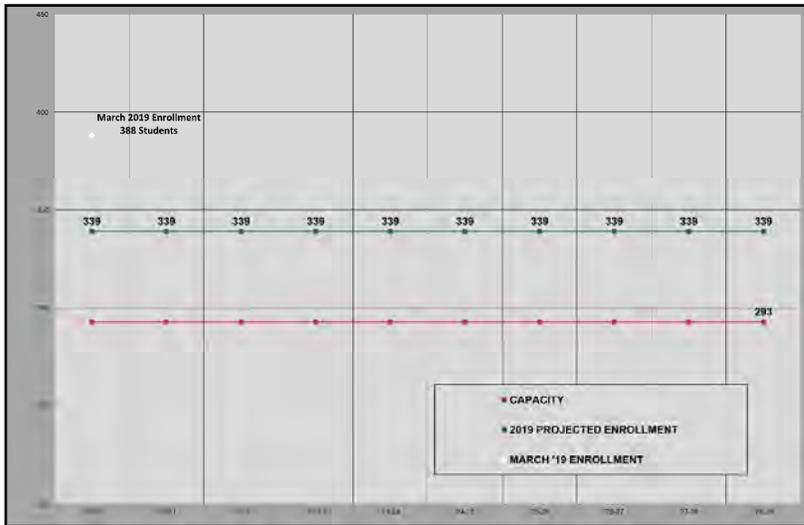
GEORGE WATTS ELEMENTARY

700 WATTS STREET

- School #:** 347
- Building Size:** 65,841 Square Feet
- Grade Level:** PK-5
- Year Built:** 1919, '26, '94
- Site Size:** 3.9 Acres

SUMMARY

Watts Elementary School, built in 1919, was expanded in 1926, and renovated in 1994. It's a Montessori Magnet facility and remains consistently enrolled at or over its capacity of 293. The current student enrollment is 388, which represents an occupancy level of 132%. Because this facility is a magnet, enrollment can be managed and the forecast is for 339 students to be enrolled every year through 2028. However, if the District decides to maintain the expected enrollment level, a classroom addition will be required (however, will be very difficult on the campus). Roofing and some HVAC work has been completed in the recent past but work associated with a 20 year renovation and the balance of the HVAC system remains.



Current Capacity: 293 Students

Current Enrollment: 388 Students
132%

Projected Enrollment: 339 Students
116%

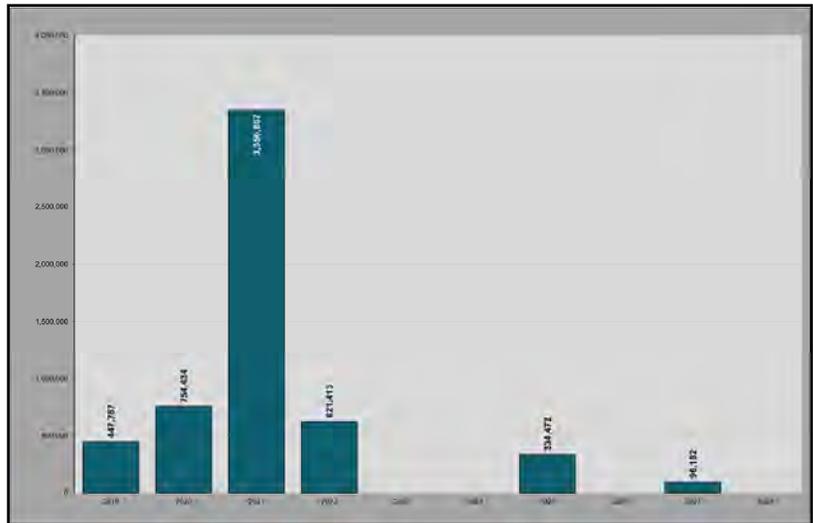
Square Feet per Student: 224.7 sf

Facility Condition Index: .28

New Construction: \$757,988

Current / Deferred Maintenance: \$4,847,158

Total Facility Needs: \$5,605,145



Durham Public Schools Capital Improvement Plan			George Wats Elementary		339	Summary Sheet		
Category/Description	Campus Program Total		\$ 5,605,145		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A	Facility Improvements:							
	New Construction							
	Currently at 132% Occupancy Level and will decrease to 116%							
- Addition	\$7,500	or		\$7,500	Need Capacity but can't build an addition on current site (Investigate)	2019	\$0	
- Addition		or	2,000	\$200.00	\$400,000	Two (2) Classroom Addition	2022	\$54,000
- Canopies		or	500	\$55.00	\$27,500	Add Canopy at Student Drop Off (50x10)	2022	\$3,713
-		or			\$0			
	Renovation							
- 20 Year Renovation		or	65,841	\$25.00	\$1,646,025	20-Year Cycle Renovation	2021	\$148,142
- Security Vestibule		or			\$0	Develop Passive Security at Front Office (2019)		
- Theater Arts Renovation	\$60,000	or			\$60,000	A/V, Lights, Rigging	2021	\$5,400
	Site							
- Grading for New Construction	\$115,000	or			\$115,000	Site Prep for Addition	2022	\$15,525
- Drainage / Erosion	\$3,500	or			\$3,500	Allowance: Investigate How To Improve Grading and Drainage System	2019	\$0
- Landscaping / Grassing	\$5,000	or			\$5,000	Landscape Refresh	2022	\$675
- Irrigation		or			\$0			
- Athletic Field(s) / Playground(s)		or			\$0			
- Athletic / Playground Equipment		or			\$0			
- Parking Lot(s)		or			\$0	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2030	\$0
- Parking Lot(s)		or	40	\$1,750.00	\$70,000	Allowance: Resurface Parking Lot & Student Dropoff	2020	\$3,150
- Driveway(s) / Turn lane(s)	\$10,000	or			\$10,000	Allowance: Replace Concrete at Drive Entrance	2020	\$450
- Sidewalks	\$15,000	or			\$15,000	Sidewalk Improvements - Included Playground ADA Access	2020	\$675
- ADA	\$10,000	or			\$10,000	Ramp At Front of School needs Replacement	2020	\$450
- Fencing		or	900	\$24.00	\$21,600	Fencing Improvements	2019	\$0
- Site Lighting		or			\$0	Duke Energy Owned System		
- Utilities		or			\$0			
-		or			\$0			
	Building Envelope							
- Structural	\$3,500	or			\$3,500	Investigate Various vertical cracks at stairwells where they tie into existing building	2019	\$0
- Roof: Low Slope		or			\$0	Original Building (A, B, D) & 1994 Addition (C, E, F, I) (Replaced 2019)	2039	\$0
- Roof: Low Slope		or			\$0	Original Building Section A and 1994 Addition Roofs (Replaced 2013)	2033	\$0
- Roof: Low Slope		or			\$0			
- Roof: Shingle		or			\$0			
- Exterior Walls	\$5,000	or			\$5,000	Pressure Wash Exterior	2021	\$450
- Exterior Doors		or			\$0			
- Storefronts / Window Walls		or			\$0			
- Windows		or			\$0			
-		or			\$0			
	Building Finishes							
- Flooring: VCT / Vinyl		or			\$0	Remove Cafeteria VCT and Replace with Epoxy (2013)	2033	\$0
- Flooring: Hard Tile / Terrazzo		or			\$0			
- Flooring: Sports Flooring		or			\$0			
- Ceiling: ACT		or			\$0			
- Ceiling: Other		or			\$0			
- Walls: Painting		or	65,841	\$1.50	\$98,762	Per 7-Year Cycle	2021	\$8,889
- Walls: Other		or			\$0			
- Casework		or			\$0			
- Interior Doors / Windows		or			\$0			
- ADA / Code Upgrades		or			\$0			
- Asbestos Abatement		or			\$0			
-		or			\$0			
	Building Systems							
- Food Service		or			\$0	Replace Hood, Cooler / Freezer (2014)	2034	\$0
- Plumbing		or	3	\$10,000.00	\$30,000	Replace Water Heaters (3) 125 Gal	2027	\$10,800
- Fire Sprinkler		or			\$0			
- HVAC		or	65,841	\$4.00	\$263,364	Replace Chiller - Per 12 Year Cycle (2013)	2025	\$71,108
- HVAC		or	65,841		\$0	Replace Boiler - Per 20 Year Cycle (2017)	2037	\$0
- HVAC		or	65,841	\$14.00	\$921,774	Replace AHUs, VAVs	2021	\$82,960
- HVAC		or	65,841	\$3.00	\$197,523	Replace Controls - Per 20 Year Cycle	2021	\$17,777
- Electrical		or	56,000	\$1.50	\$84,000	Replace Balance of T8s to LED	2021	\$7,560
- Fire Alarm		or			\$0	Full System Replacement - Per 20 Year Cycle (2015)	2035	\$0
- Security: Cameras		or	37	\$1,100.00	\$40,700	Upgrade Existing "Older" I.P. Cameras	2027	\$14,652
- Security: Intrusion	\$5,160	or			\$5,160	Head End Replacement - Per 20 Year Cycle	2021	\$464
- Intercom		or	65,841	\$0.85	\$55,965	Full System Replacement - Per 20 Year Cycle	2021	\$5,037
- Access Controls	\$20,000	or			\$20,000	S2 Door Access	2020	\$900
-		or			\$0			
	Technology							
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle		
- UPS		or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or			\$0	Additional Drops		
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle		
		or			\$0			
	Facility Improvements Sub Total							
					\$4,116,872			
II B	Support Costs							
Prof/Pm/Support Fees	10%				\$411,687		2019	\$0
Survey/Testing	1.5%				\$61,753		2020	\$2,779
Storage and Moving					\$0			
City Fees/County					\$0			
FF&E	3%				\$123,506	Allowance - Refresh	2020	\$5,558
Land Purchase					\$0			
Contingency	10%				\$411,687		2020	\$18,526
	Support Costs Subtotal							
					\$1,008,634			
	Program Subtotal							
					\$5,125,506			
	Program Escalation							
					\$479,639			\$479,639
	Program Total							
					\$5,605,145			



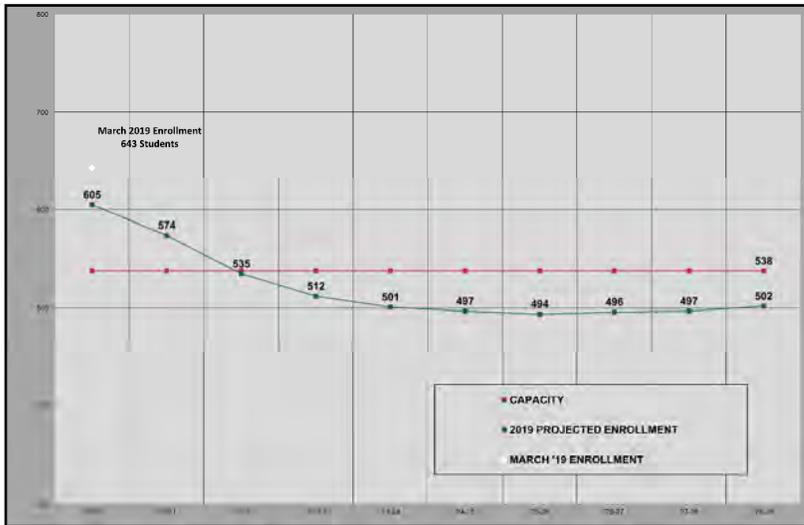
GLENN ELEMENTARY

2415 EAST GREER STREET

- School #:** 320
- Building Size:** 80,330 Square Feet
- Grade Level:** K-5
- Year Built:** 1981, '93
- Site Size:** 34.2 Acres

SUMMARY

Glenn Elementary School is a prototype design that was used by DPS on eight facilities in the early 1990's. The facility is a "restart" school and is currently over capacity but is functioning due to the use of seven (7) mobile units. Over the next two years, the facility will need roofing and renovations as well as a way to manage the near term overcrowding but enrollment is projected to reduce to 502 at the beginning of the 2028 School Year, which is slightly under capacity. Cost for Roofing has been identified with the lottery and work should be completed in 2019 / 2020.



Current Capacity: 538 Students

Current Enrollment: 643 Students
120%

Projected Enrollment: 502 Students
93%

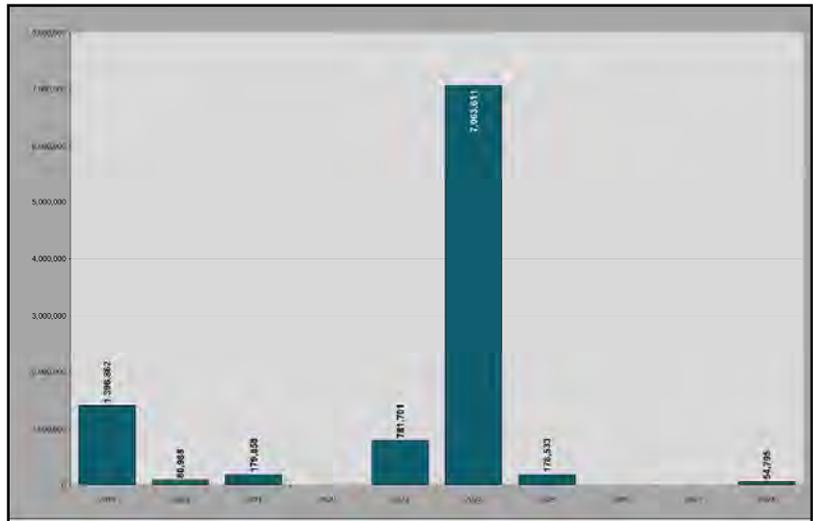
Square Feet per Student: 149.3 sf

Facility Condition Index: .40

New Construction: \$0

Current / Deferred Maintenance: \$9,736,340

Total Facility Needs: \$9,736,340



Durham Public Schools			Glenn Elementary		School 320	Summary Sheet		
Capital Improvement Plan			Campus Program Total		9,736,340			
Category/Description	Campus Program Total		\$		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A	Facility Improvements:							
	New Construction							
	- Addition	or		\$0	Currently at 120% Occupancy Level but will reduce to 93%			
	-	or		\$0				
	Renovation							
	+ 20 Year Renovation	or	80,330	\$25.00	\$2,008,250	20-Year Cycle Renovation (Entire Facility)	2024 \$451,856	
	+ 20 Year Renovation	or	6	\$60,000.00	\$300,000	Renovate Group Restrooms (Plumbing in Bad Shape)	2024 \$67,500	
	- Theater Arts Renovation	or			\$60,000	A/V, Lights, Rigging	2024 \$13,500	
	Site							
	- Grading for New Construction	or			\$0			
	- Drainage / Erosion	or			\$25,000	Allowance: Correct Site Drainage Issues at E. Geer Street	2020 \$1,125	
	- Landscaping / Grassing	or			\$5,000	Landscape Refresh	2024 \$1,125	
	- Irrigation	or			\$0			
	- Athletic Field(s) / Playground(s)	or			\$125,000	Allowance: Need New Playground Equipment and Surface	2021 \$11,250	
	- Athletic Field(s) / Playground(s)	or			\$10,000	Allowance: Install A Walking Track (Interview)	2021 \$900	
	- Athletic / Playground Equipment	or			\$0			
	- Parking Lot(s)	or			\$25,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2020 \$1,125	
	- Driveway(s) / Turn lane(s)	or			\$20,000	Allowance: Repair Section of Bus Lot; Left circular Section	2020 \$900	
	- Driveway(s) / Turn lane(s)	or	1,300	\$30.00	\$39,000	Pave Emergency Drive Loop (1000' x 12')	2028 \$15,795	
	- Sidewalks	or			\$0			
	- ADA	or			\$7,500	Playground ADA Access	2020 \$338	
	- Fencing	or			\$0			
	- Site Lighting	or			\$15,000	DPS Owned System, Convert to LED	2024 \$3,375	
	- Utilities	or			\$0			
	-	or			\$0			
	Building Envelope							
	- Structural	or			\$0			
	- Roof: Low Slope	or			\$1,184,203	Replace Main Building Roof. 1981 Building Replaced in 2009	2019 \$0	
	- Roof: Metal	or			\$150,559	Metal Canopies Installed in 1993, 1981 Canopy, Storage Bldg.	2019 \$0	
	- Roof: Shingle	or			\$0			
	- Roof: Skylights	or			\$62,100	Replace Translucent Skylights (M, I)	2019 \$0	
	- Exterior Walls	or			\$0			
	- Exterior Doors	or			\$0			
	- Storefronts / Window Walls	or			\$0			
	- Windows	or			\$0			
	-	or			\$0			
	Building Finishes							
	- Flooring: VCT / Vinyl	or			\$0	Add VCT in Media Center (Part of 20 Year Renovation)	2024 \$0	
	- Flooring: Hard Tile / Terrazzo	or			\$0			
	- Flooring: Sports Flooring	or			\$0			
	- Ceiling: ACT	or			\$0			
	- Ceiling: Other	or			\$0			
	- Walls: Painting	or	80,330	\$1.75	\$140,578	Per 7-Year Cycle	2025 \$37,956	
	- Walls: Other	or			\$0			
	- Casework	or			\$0			
	- Interior Doors / Windows	or			\$0			
	- ADA / Code Upgrades	or			\$10,000	Upgrade Miscellaneous Building Systems	2024 \$2,250	
	- Asbestos Abatement	or	80,330	\$1.40	\$112,462	Pre 1989 CMU Walls	2024 \$25,304	
	-	or			\$0			
	Building Systems							
	- Food Service	or			\$250,000	Replace Hood, Dish washer, Cooler / Freezer	2024 \$56,250	
	- Food Service	or			\$85,000	Refresh Kitchen Equipment	2024 \$19,125	
	- Plumbing	or	6	\$1,500.00	\$9,000	Replace Water Coolers (6)	2024 \$2,025	
	- Plumbing	or	1	\$10,000.00	\$10,000	Replace Water Heaters (2) 125 Gal	2021 \$900	
	- Fire Sprinkler	or			\$0			
	- HVAC	or	80,330	\$4.00	\$321,320	Replace Chiller - Per 12 Year Cycle (2007)	2024 \$72,297	
	- HVAC	or	80,330	\$2.00	\$160,660	Replace Boilers - Per 20 Year Cycle	2024 \$36,149	
	- HVAC	or	80,330	\$14.00	\$1,124,620	Replace AHUs	2024 \$253,040	
	- HVAC	or	80,330	\$3.50	\$281,155	Replace Controls - Per 20 Year Cycle (2016)	2024 \$63,260	
	- Electrical	or			\$0			
	- Fire Alarm	or			\$0	Full System Replacement - Per 20 Year Cycle (2014)	2034 \$0	
	- Security: Cameras	or			\$56,250	Full System Replacement - Per 6 Year Cycle (Replaced 2018)	2024 \$12,656	
	- Security: Intrusion	or			\$6,931	Full System Replacement - Per 20 Year Cycle	2024 \$1,559	
	- Intercom	or			\$0	Full System Replacement - Per 20 Year Cycle (2014)	2034 \$0	
	- Access Controls	or			\$20,000	S2 Door Access	2021 \$1,800	
	Technology							
	- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle		
	- UPS	or			\$0	Replace - Per 5 Year Cycle		
	- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle		
	- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle		
	- Data Cabling / Racks	or			\$0	Additional Drops		
	- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle		
	-	or			\$0			
	Facility Improvements Sub Total				\$6,624,588			
II B	Support Costs							
	Prof/Pm/Support Fees	10%			\$662,459		2023 \$119,243	
	Survey/Testing	1.50%			\$99,369		2024 \$22,358	
	Storage and Moving				\$0			
	City Fees/County				\$0			
	FF&E	3%			\$198,738	Allowance - Refresh	2024 \$44,716	
	Land Purchase				\$0			
	Contingency	10%			\$662,459		2024 \$149,053	
	Support Costs Subtotal				\$1,623,024			
	Program Subtotal				\$8,247,611			
	Program Escalation				\$1,488,729			\$1,488,729
	Program Total				\$9,736,340			



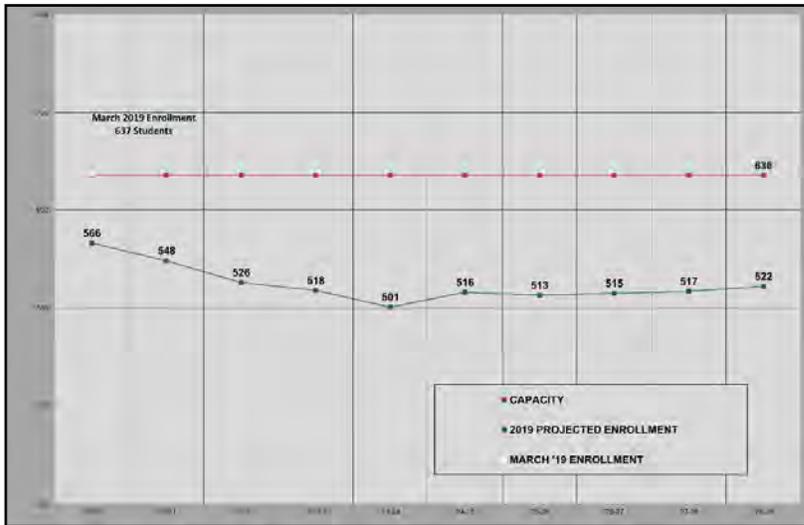
HILLANDALE ELEMENTARY

2730 HILLANDALE ROAD

- School #:** 324
- Building Size:** 85,890 Square Feet
- Grade Level:** PK-5
- Year Built:** 1993
- Site Size:** 42.0 Acres

SUMMARY

Hillandale Elementary was built in 1993 and is one of eight prototype schools built in that time frame. It has a capacity of 636 and currently serves 637 students. A 100% occupancy level typically represents an overcrowding situation but with the enrolment projected to decrease to 501 in 2023 before rebounding to 521 in 2028, it is not recommended to revise district lines or build more capacity. Although a roofing project was completed in 2015, the FCI remains the fair to poor range due to needs associated with a 20 year cycle renovation and HVAC system needs.



Current Capacity: 636 Students

Current Enrollment: 637 Students
100%

Projected Enrollment: 522 Students
82%

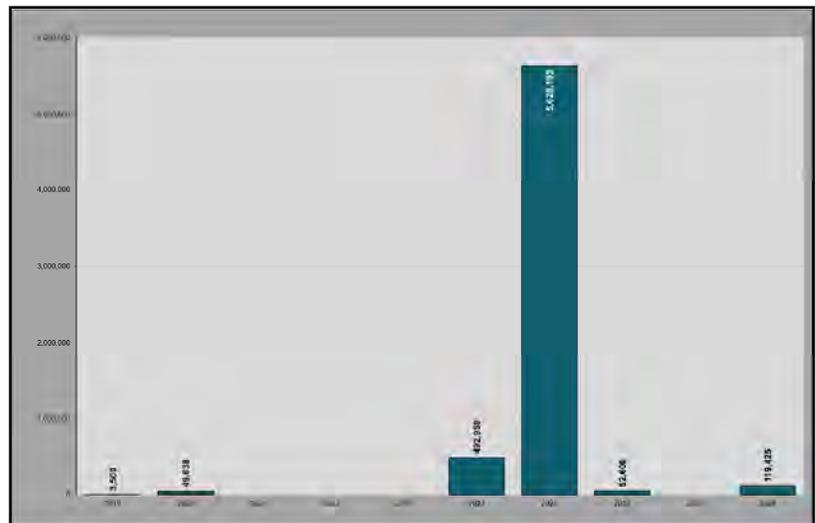
Square Feet per Student: 135.0 sf

Facility Condition Index: .24

New Construction: \$0

Current / Deferred Maintenance: \$6,346,314

Total Facility Needs: \$6,346,314



Durham Public Schools Capital Improvement Plan			Hillandale Elementary		594	Summary Sheet	
Category/Description	Campus Program Total		\$ 6,346,314		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction							
- Addition		or		\$0	Currently at 100% Occupancy Level but will reduce to 79%		
-		or		\$0			
Renovation							
- 20 Year Renovation		or	85,890	\$25.00	\$2,147,250	20-Year Cycle Renovation	2025 \$579,758
- Theater Arts Renovation	\$60,000	or			\$60,000	AV, Lights, Rigging	2025 \$16,200
Site							
- Grading for New Construction		or			\$0		
- Drainage / Erosion	\$3,500	or			\$3,500	Investigate Water coming out from under building during heavy rain (front office)	2019 \$0
- Landscaping / Grassing	\$5,000	or			\$5,000	Landscape Refresh	2025 \$1,350
- Irrigation		or			\$0		
- Athletic Field(s) / Playground(s)		or			\$0		
- Athletic / Playground Equipment		or			\$0		
- Parking Lot(s)	\$10,000	or			\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2025 \$2,700
- Driveway(s) / Turn lane(s)		or			\$0		
- Sidewalks		or			\$0		
- ADA	\$7,500	or			\$7,500	Playground ADA Access / Others	2020 \$338
- Fencing		or			\$0		
- Site Lighting	\$15,000	or			\$15,000	DPS Owned System, Convert to LED	2025 \$4,050
- Utilities		or			\$0		
-		or			\$0		
Building Envelope							
- Structural		or			\$0		
- Roof: Low Slope		or			\$0	Replace Main Building Roof (2015)	2035 \$0
- Roof: Metal		or			\$0	Replace Canopy Roofs (2015)	2040 \$0
- Roof: Skylights		or			\$0	Replace Skylights (2015)	2035 \$0
- Exterior Walls		or			\$0		
- Exterior Doors		or			\$0		
- Storefronts / Window Walls		or			\$0		
- Windows		or			\$0		
-		or			\$0		
Building Finishes							
- Flooring: VCT / Vinyl		or			\$0		
- Flooring: Hard Tile / Terrazzo		or			\$0		
- Flooring: Sports Flooring / Carpet		or			\$0	Replace Classroom Carpet with VCT (Only in K-1) (2014)	
- Ceiling: ACT		or			\$0		
- Ceiling: Other		or			\$0		
- Walls: Painting		or	85,890	\$1.50	\$128,835	Per 7-Year Cycle	2025 \$34,785
- Walls: Other	\$12,001	or			\$12,001	Wallpaper coming down in many rooms / remove and paint	2025 \$3,240
- Casework		or			\$0		
- Interior Doors / Windows		or			\$0		
- ADA / Code Upgrades		or			\$0		
- Asbestos Abatement		or			\$0		
-		or			\$0		
Building Systems							
- Food Service		or			\$0	Replace Cooler / Freezer (2015)	2035 \$0
- Food Service	\$85,000	or			\$85,000	Replace Hood, Dish Washer, Kitchen Equipment	2028 \$34,425
- Plumbing		or	6	\$500.00	\$3,000	Replace Hose Bibs	2025 \$810
- Plumbing		or	2	\$10,000.00	\$20,000	Replace Water Heaters (2) 125 Gal	2020 \$900
- Fire Sprinkler		or			\$0		
- HVAC		or			\$0	Replace Chiller - Per 12 Year Cycle (2018)	2030 \$0
- HVAC		or			\$0	Replace Boilers - Per 20 Year Cycle (Not Original)	2030 \$0
- HVAC		or	85,890	\$14.00	\$1,202,460	Replace AHU's	2025 \$324,664
- HVAC		or	85,890	\$3.00	\$257,670	Replace Controls - Per 20 Year Cycle (2016) (Lots of HVAC control issues)	2025 \$69,571
- Electrical		or			\$0		
- Fire Alarm		or	85,890		\$0	Full System Replacement - Per 20 Year Cycle (2015)	2035 \$0
- Security: Cameras		or	32	\$1,250.00	\$40,000	Upgrade Existing "Older" I.P. Cameras & Server (More playground cams)	2026 \$12,600
- Security: Intrusion	\$6,931	or			\$6,931	Head End Replacement - Per 20 Year Cycle	2025 \$1,871
- Intercom		or			\$0	Full System Replacement - Per 20 Year Cycle (2015)	2035 \$0
- Access Controls	\$20,000	or			\$20,000	S2 Door Access	2020 \$900
-		or			\$0		
Technology							
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle	
- UPS		or			\$0	Replace - Per 5 Year Cycle	
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle	
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle	
- Data Cabling / Racks		or			\$0	Additional Drops	
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle	
-		or			\$0		
Facility Improvements Sub Total					\$4,024,147		
II B Support Costs							
Prof/Pm/Support Fees	10%				\$402,415		2024 \$90,543
Survey/Testing	1.5%				\$60,362		2025 \$16,298
Storage and Moving					\$0		
City Fees/County					\$0		
FF&E	3%				\$120,724	Allowance - Refresh	2025 \$32,596
Land Purchase					\$0		
Contingency	10%				\$402,415		2025 \$108,652
Support Costs Subtotal					\$985,916		
Program Subtotal					\$5,010,063		
Program Escalation					\$1,336,251		\$1,336,251
Program Total					\$6,346,314		



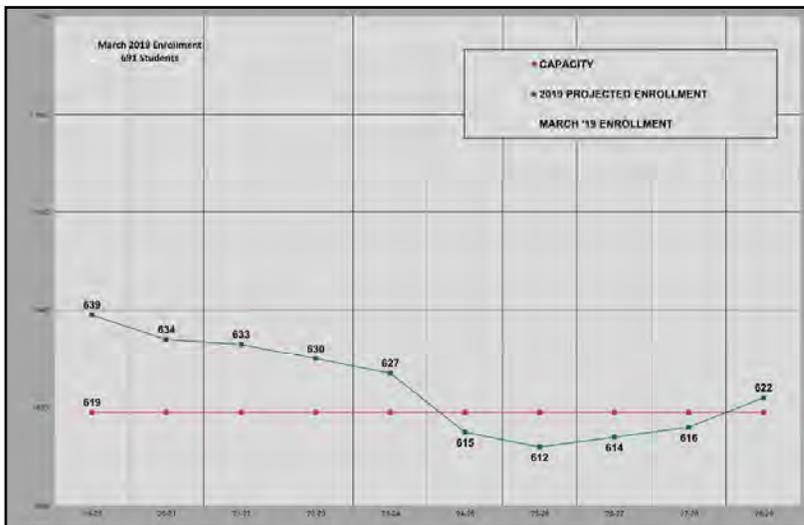
HOLT ELEMENTARY

4019 HOLT SCHOOL ROAD

- School #:** 328
- Building Size:** 98,208 Square Feet
- Grade Level:** PK-5
- Year Built:** 1958, '84, '92
- Site Size:** 23.6 Acres

SUMMARY

Holt Elementary is a magnet school with a year-round calendar. The current enrollment of 691 is above the 619 facility capacity but enrollment should dip to 612 in 2025 and then rebound to 622 in 2028. This enrolment represents a 100% occupancy level and is technically overcrowded so relief should be considered by means of revising the enrollment cap. The facility was originally built in 1958 and had subsequent additions / renovations in 1984 and 1992 and over the next ten years a 20 year cycle renovation, HVAC System replacement, some site related corrections, and attention to several electrical systems will be due to keep the FCI from reaching a critical level of 0.37.



Current Capacity: 619 Students

Current Enrollment: 691 Students
112%

Projected Enrollment: 622 Students
100%

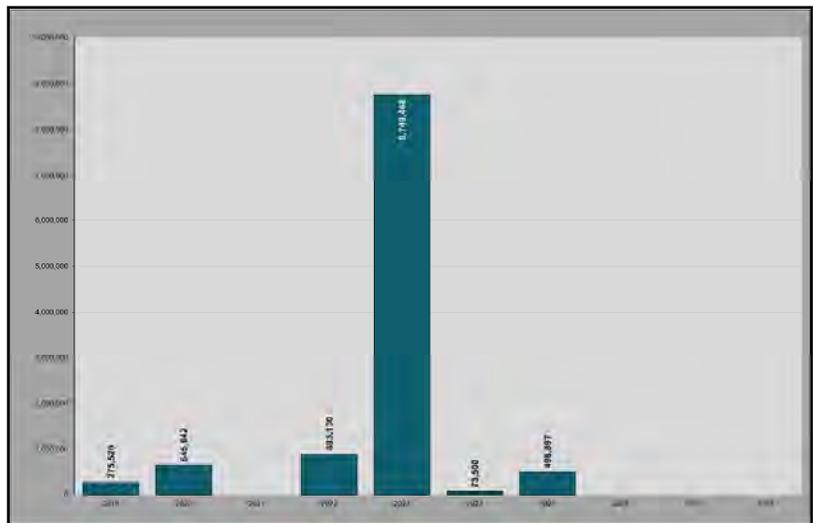
Square Feet per Student: 158.7 sf

Facility Condition Index: .37

New Construction: \$0

Current / Deferred Maintenance: \$11,136,155

Total Facility Needs: \$11,136,155



Durham Public Schools		Holt Elementary		School 328		Summary		
Capital Improvement Plan		Campus Program Total		\$ 11,136,155		Base		
Category/Description	Campus Program Total		\$ 11,136,155		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A Facility Improvements:								
New Construction								
- Addition		or		\$0	Currently at 112% Occupancy Level but will reduce to 100%			
		or		\$0				
Renovation								
- 20 Year Renovation		or	98,208	\$25.00	\$2,455,200	20-Year Cycle Renovation	2023	\$441,036
- Security Vestibule		or			\$0	Develop Passive Security at Front Office (2019)		
- Theater Arts Renovation	\$60,000	or			\$60,000	A/V, Lights, Rigging	2023	\$10,600
		or			\$0			
Site								
- Grading for New Construction		or			\$0			
- Drainage / Erosion	\$25,000	or			\$25,000	Address Drainage Issues at New Wing	2019	\$0
- Landscaping / Grassing	\$5,000	or			\$5,000	Landscape Refresh	2023	\$900
- Irrigation		or			\$0			
- Athletic Field(s) / Playground(s)	\$125,000	or			\$125,000	Replace PG04 / PG04 Equipment	2020	\$5,625
- Athletic / Playground Equipment		or			\$0			
- Parking Lot(s)		or	6,800	\$18.00	\$122,400	Repair and overlay of existing asphalt	2020	\$5,508
- Driveway(s) / Turn lane(s)		or			\$0			
- Sidewalks		or	250	\$10.00	\$2,500	Replace Courtyard Sidewalk	2020	\$113
- ADA	\$20,000	or			\$20,000	Playground ADA Access	2020	\$900
- Fencing		or			\$0			
- Site Lighting	\$20,000	or			\$20,000	DPS Owned System, Convert to LED (Add Additional Exterior Lights)	2023	\$3,600
- Utilities		or			\$0			
		or			\$0			
Building Envelope								
- Structural		or			\$0			
- Roof: Low Slope		or	7,000		\$0	Replace Original Building (2011)	2031	\$0
- Roof: Low Slope		or			\$0	Replace Cafe, Gym, Front Canopy, 1992 Addition (2019)	2039	\$0
- Roof: Metal		or			\$0	Replace 1984 Canopy Roofs (2018)	2039	\$0
- Roof: Shingle		or			\$0			
- Exterior Walls		or			\$0			
- Exterior Doors		or			\$0			
- Storefronts / Window Walls		or			\$0			
- Windows		or	20	\$3,000.00	\$60,000	Replace Window Glazing	2020	\$2,700
- Water Intrusion	\$150,000	or			\$150,000	Allowance: Basement at 1992 Addition	2020	\$6,750
		or			\$0			
Building Finishes								
- Flooring: VCT / Vinyl		or			\$0			
- Flooring: Hard Tile / Terrazzo		or			\$0			
- Flooring: Sports Flooring		or			\$0			
- Ceiling: ACT		or			\$0			
- Ceiling: Other		or			\$0			
- Walls: Painting		or	98,208	\$1.50	\$147,312	Per 7-Year Cycle	2023	\$26,516
- Walls: Other		or			\$0			
- Casework		or			\$0			
- Interior Doors / Windows		or			\$0			
- ADA / Code Upgrades	\$10,000	or			\$10,000	Upgrade Miscellaneous Building Items	2023	\$1,800
- Asbestos Abatement		or	98,208	\$1.40	\$137,491	Pre 1989 CMU Walls & Remove Asbestos Flooring	2023	\$24,748
		or			\$0			
Building Systems								
- Food Service		or			\$0	Replace Hood, Freezer, Dish Washer (2018)	2038	\$0
- Food Service		or			\$0	Replace Cooler, Kitchen Equipment	2030	\$0
- Plumbing		or	1	\$5,000.00	\$5,000	Replace Water Heaters (1) 100 Gal	2019	\$0
- Plumbing		or	2	\$2,500.00	\$5,000	Replace Mop Sinks / Fixtures (2) Rooms	2023	\$900
- Plumbing	\$25,000	or			\$25,000	Allowance: Below Slab Plumbing (Inspect / Correct)	2020	\$1,125
- Fire Sprinkler		or			\$0			
- HVAC		or	98,208	\$4.00	\$392,832	Replace Chiller - Per 12 Year Cycle (2009)	2025	\$106,065
- HVAC		or	98,208	\$1.15	\$112,939	Replace DX Furnace	2020	\$5,082
- HVAC		or	98,208	\$30.00	\$2,946,240	Replace AHUs, Convert from 2 pipe to 4 pipe	2023	\$530,323
- HVAC		or	98,208	\$3.00	\$294,624	Replace Controls - Per 20 Year Cycle (2007)	2023	\$53,032
- Electrical		or			\$0	Replaced xx of T8s to LED (2017)		
- Electrical		or	90,000	\$1.50	\$135,000	Replace Balance of T8s to LED	2023	\$24,300
- Electrical	\$50,000	or			\$50,000	Replace Switchgear (2nd Generation to Bldg.)	2023	\$9,000
- Fire Alarm		or	98,208	\$2.50	\$245,520	Full System Replacement - Per 20 Year Cycle	2019	\$0
- Security: Cameras	\$60,000	or			\$60,000	Full System Replacement - Per 6 Year Cycle (Replaced 2018)	2024	\$13,500
- Security: Intrusion	\$6,931	or			\$6,931	Full System Replacement - Per 20 Year Cycle	2023	\$1,248
- Intercom	\$30,000	or			\$30,000	Full System Replacement - Per 20 Year Cycle	2023	\$5,400
- Access Controls	\$20,000	or			\$20,000	S2 Door Access	2022	\$2,700
		or			\$0			
Technology								
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle		
- UPS		or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or			\$0	Additional Drops		
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle		
		or			\$0			
Facility Improvements Sub Total					\$7,668,989			
II B Support Costs								
Prof/Pm/Support Fees	10%				\$766,899		2022	\$103,531
Survey/Testing	1.5%				\$115,035		2023	\$20,706
Storage and Moving					\$0			
City Fees/County					\$0			
FF&E	3%				\$230,070	Allowance - Refresh	2023	\$41,413
Land Purchase					\$0			
Contingency	10%				\$766,899		2023	\$138,042
Support Costs Subtotal					\$1,878,902			
Program Subtotal					\$9,547,892			
Program Escalation					\$1,588,263			\$1,588,263
Program Total					\$11,136,155			



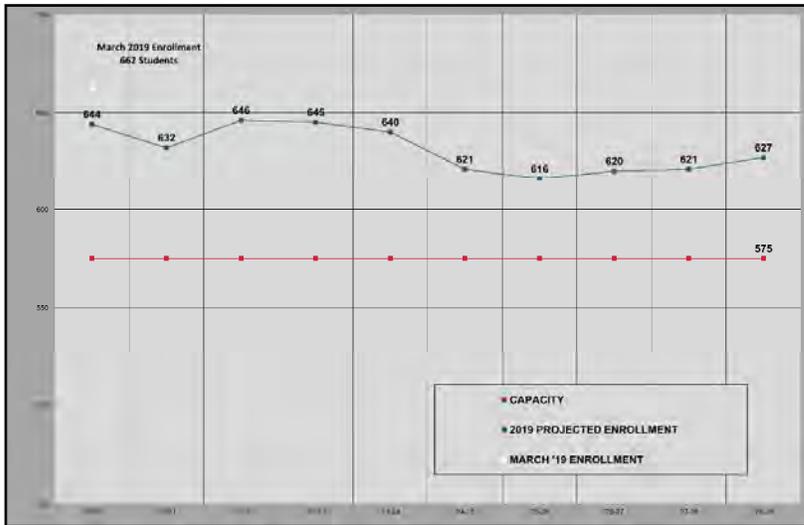
HOPE VALLEY ELEMENTARY

3005 DIXON ROAD

- School #:** 327
- Building Size:** 79,228 Square Feet
- Grade Level:** K-5
- Year Built:** 1967, '99
- Site Size:** 16.4 Acres

SUMMARY

The facility was originally built in 1967 but was destroyed by fire and rebuilt in 1999. The facility has been chronically over capacity for many years and the K-3 legislation has further impacted this issue. The current capacity is 575 students and the current enrollment is 662 students, the enrollment is forecasted to decline to 627 in 2028, but this figure still represents an excessive enrollment of 10%. The District should consider relief by way of a classroom addition or revising attendance district lines. The facility will have a critical FCI factor of 0.65 in 2028 if the significant amount of deferred and current maintenance needs are not addressed; items such as a 20 year cycle renovation, site related corrections, roofing, and HVAC system replacement.



Current Capacity: 575 Students

Current Enrollment: 662 Students
115%

Projected Enrollment: 627 Students
109%

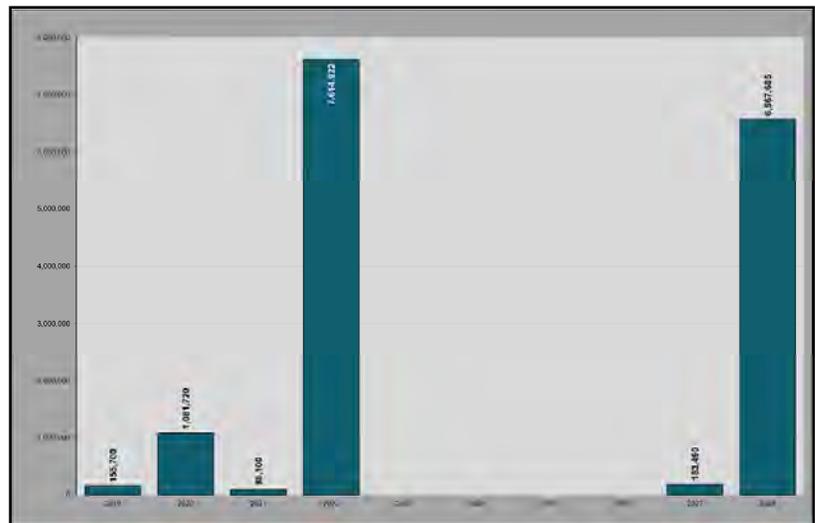
Square Feet per Student: 124.5 sf

Facility Condition Index: .65

New Construction: \$2,366,700

Current / Deferred Maintenance: \$13,334,837

Total Facility Needs: \$15,701,537



Durham Public Schools Capital Improvement Plan			Hope Valley Elementary		652	Summary Sheet	
Category/Description	Campus Program Total		\$ 15,701,537		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A	Facility Improvements:						
	New Construction						
- Addition	or	8,000	\$200.00	\$1,600,000	Currently at 115% Occupancy Level but will reduce to 109%		
-	or			\$0	Eight (8) Classroom Addition	2022	\$216,000
	Renovation						
- 20 Year Renovation	or	69,228	\$25.00	\$1,730,700	20-Year Cycle Renovation (1999)	2022	\$239,645
- 20 Year Renovation	or	10,000	\$25.00	\$250,000	20-Year Cycle Renovation @ Cafe' and Gym	2022	\$33,750
- Security Vestibule	or			\$0	Develop Passive Security at Front Office (2019)		
- Theater Arts Renovation	or	\$60,000		\$60,000	A/V, Lights, Rigging	2022	\$8,100
	Site						
- Grading for New Construction	or	\$115,000		\$115,000	Site Prep for Classroom Addition	2022	\$15,525
- Drainage / Erosion	or	\$3,500		\$3,500	Investigate Water Leak Under Building - (Slab)	2019	\$0
- Landscaping / Grassing	or	\$5,000		\$5,000	Landscape Refresh	2022	\$675
- Irrigation	or			\$0			
- Athletic Field(s) / Playground(s)	or	\$125,000		\$125,000	Replace PG01 & PG02 Equipment	2019	\$0
- Athletic / Playground Equipment	or	\$15,000		\$15,000	Regrade / Top Dress Athletic Fields	2019	\$0
- Parking Lot(s)	or	\$10,000		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2021	\$900
- Parking Lot(s)	or		20	\$2,250.00	Additional Parking Spaces Needed	2021	\$4,050
- Driveway(s) / Turf lane(s)	or			\$0			
- Sidewalks	or			\$0			
- ADA	or	\$5,000		\$5,000	Add Sidewalk to Mobile Units and Playground - ADA Access	2019	\$0
- Fencing	or		400	\$18.00	Add Fencing Around Parking to Keep Out Public	2019	\$0
- Site Lighting	or	\$15,000		\$15,000	DPS Owned System, Convert to LED	2021	\$1,350
- Utilities	or			\$0			
-	or			\$0			
	Building Envelope						
- Structural	or			\$0			
- Roof: Low Slope	or	\$1,230,198		\$1,230,198	Replace Main Building Roof	2022	\$166,077
- Roof: Metal	or			\$0			
- Roof: Shingle	or			\$0			
- Exterior Walls	or			\$0			
- Exterior Doors	or			\$0			
- Storefronts / Window Walls	or			\$0			
- Windows	or			\$0			
	Building Finishes						
- Flooring: VCT / Vinyl	or		7,500	\$4.50	Replace All Carpet with Tile - VCT / LVT	2022	\$4,556
- Flooring: Hard Tile / Terrazzo	or			\$0			
- Flooring: Sports Flooring	or			\$0			
- Ceiling: AC1	or			\$0			
- Ceiling: Other	or			\$0			
- Walls: Painting	or		79,228	\$1.50	Per 7-Year Cycle	2022	\$16,044
- Walls: Other	or			\$0			
- Casework	or			\$0			
- Interior Doors / Windows	or			\$0			
- ADA / Code Upgrades	or			\$0			
- Asbestos Abatement	or		79,228	\$1.40	Pre 1989 CMU Walls	2027	\$39,931
-	or			\$0			
	Building Systems						
- Food Service	or	\$75,000		\$75,000	Replace Cooler / Freezer	2022	\$10,125
- Plumbing	or			\$0	Water Heaters Rebuilt (2018)	2030	\$0
- Fire Sprinkler	or			\$0			
- HVAC	or		79,228	\$4.00	Replace Chiller - Per 12 Year Cycle (2017)	2028	\$128,349
- HVAC	or		79,228	\$2.00	Replace Boilers - Per 20 Year Cycle	2028	\$64,175
- HVAC	or		79,228	\$50.00	Replace HVAC System with 4-pipe System	2028	\$1,604,367
- HVAC	or		79,228	\$3.00	Replace Controls - Per 20 Year Cycle (2015)	2028	\$96,262
- Electrical	or			\$0			
- Fire Alarm	or			\$0	Full System Replacement - Per 20 Year Cycle (2014)	2034	\$0
- Security: Cameras	or		24	\$1,000.00	Upgrade Existing "Older" I.P. Cameras & Server (Survey)	2027	\$8,640
- Security: Intrusion	or	\$7,075		\$7,075	Full System Replacement - Per 20 Year Cycle	2020	\$318
- Intercom	or			\$0	Full System Replacement - Per 20 Year Cycle (2014)	2034	\$0
- Access Controls	or	\$20,000		\$20,000	S2 Door Access	2021	\$1,800
-	or			\$0			
	Technology						
- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle		
- UPS	or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks	or			\$0	Additional Drops		
- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle		
-	or			\$0			
	Facility Improvements Sub Total				\$10,280,636		
II B	Support Costs						
Prof/Pm/Support Fees		10%		\$1,028,064		2020	\$46,263
Survey/Testing		1.5%		\$154,210		2022	\$20,818
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E		3%		\$308,419	Allowance - Refresh	2022	\$41,637
Land Purchase				\$0			
Contingency		10%		\$1,028,064		2022	\$138,789
	Support Costs Subtotal				\$2,518,756		
	Program Subtotal				\$12,799,392		
	Program Escalation				\$2,902,145		\$2,902,145
	Program Total				\$15,701,537		



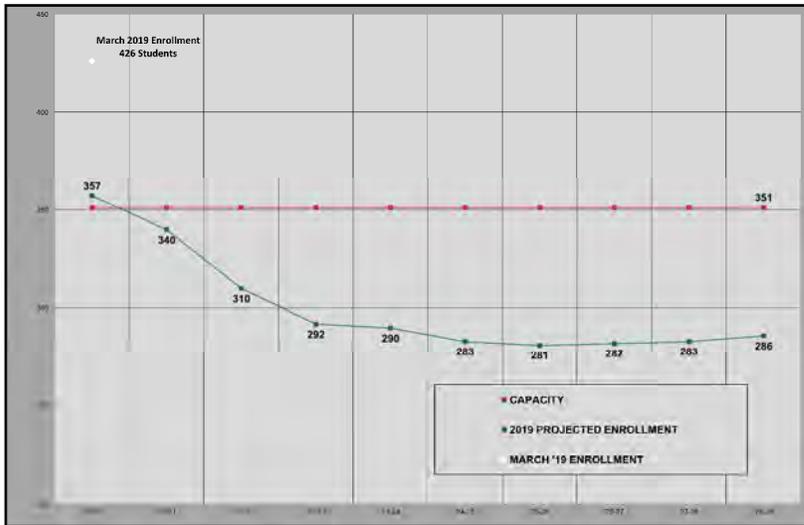
LAKEWOOD ELEMENTARY

2520 VESSON AVENUE

- School #:** 339
- Building Size:** 60,264 Square Feet
- Grade Level:** PK-5
- Year Built:** 1962, 63, '64, '05
- Site Size:** 12.5 Acres

SUMMARY

Enrollment at Lakewood Elementary School is currently above capacity and is expected to remain so until the 2020 school year. Once the enrollment drops to or below the facility capacity of 351 students, the mobile units on site can be removed and the campus can be better secured. Ultimately, it is expected that the enrollment will continue to decrease until the 2028 school year when 286 students were expected to attend (81% occupancy level). The FCI factor for this facility is currently low and will remain good to fair until 2027 when it will spike to .34 which is critical. The District should plan to address the needs associated with a 20 year cycle renovation, site improvements, HVAC system replacement, and issues with electrical system needs.



Current Capacity: 351 Students

Current Enrollment: 426 Students
121%

Projected Enrollment: 286 Students
81%

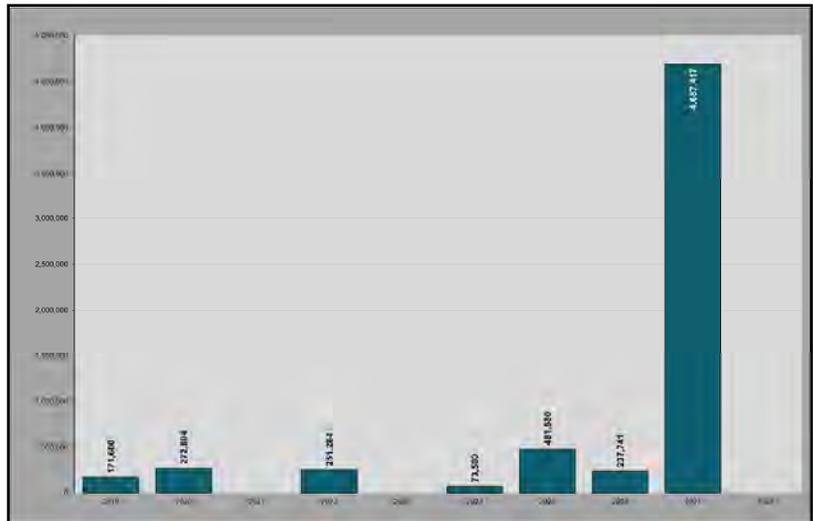
Square Feet per Student: 171.7 sf

Facility Condition Index: .34

New Construction: \$0

Current / Deferred Maintenance: \$6,175,957

Total Facility Needs: \$6,175,957



Durham Public Schools Capital Improvement Plan			Lakewood Elementary		389	Summary Sheet		
Category/Description	Campus Program Total		\$ 6,175,957		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A Facility Improvements:								
New Construction					Five (5) Portables in bad condition			
- Addition		or		\$0	Currently at 121% Occupancy Level but will decrease to 80%			
-		or		\$0				
Renovation								
- 20 Year Renovation		or	60,264	\$25.00	\$1,506,600	Per 20 Year Cycle	2027	\$542,376
- 20 Year Renovation		or	6	\$50,000.00	\$300,000	Renovate Group Restrooms in 1967 Building	2027	\$108,000
- Security Vestibule		or			\$0	Develop Passive Security at Front Office (2019)		
- Theater Arts Renovation	\$60,000	or			\$60,000	A/V, Lights, Rigging	2024	\$13,500
-								
Site								
- Grading for New Construction		or			\$0			
- Drainage / Erosion		or			\$0			
- Landscaping / Grassing	\$5,000	or			\$5,000	Landscape Refresh	2022	\$675
- Irrigation		or			\$0			
- Athletic Field(s) / Playground(s)		or			\$0			
- Athletic / Playground Equipment		or			\$0			
- Parking Lot(s)		or	50	\$1,750.00	\$87,500	Repair / Replace Asphalt on Small Parking Lot	2022	\$11,813
- Parking Lot(s)	\$3,500	or			\$3,500	Allowance: Investigate - "Groundwater" Issue Under Asphalt at Side Parking Lot	2019	\$0
- Parking Lot(s)	\$10,000	or			\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2022	\$1,350
- Driveway(s) / Turn lane(s)		or			\$0			
- Sidewalks		or			\$0			
- ADA	\$7,500	or			\$7,500	Playground ADA Access	2019	\$0
- Fencing	\$10,000	or			\$10,000	Replace Wood Privacy Fence at Dumpster	2019	\$0
- Site Lighting		or			\$0	Duke Owned System		
- Utilities		or			\$0			
-		or			\$0			
Building Envelope								
- Structural		or			\$0			
- Roof: Low Slope		or			\$0	Main Building Roof Replaced in 2009	2029	\$0
- Roof: Metal		or			\$0	Media Center and Canopies Replaced in 2005	2029	\$0
- Roof: Shingle		or			\$0			
- Exterior Walls	\$15,000	or			\$15,000	Clean / Refurbish Exterior Stucco	2022	\$2,025
- Exterior Doors		or			\$0			
- Storefronts / Window Walls		or			\$0			
- Windows		or			\$0			
-		or			\$0			
Building Finishes								
- Flooring: VCT / Vinyl		or	4,500	\$3.00	\$13,500	Replace gym floor w/ VCT	2022	\$1,823
- Flooring: Hard Tile / Terrazzo		or			\$0			
- Flooring: Sports Flooring		or			\$0			
- Ceiling: ACT		or			\$0			
- Ceiling: Other		or			\$0			
- Walls: Painting		or	60,264	\$1.50	\$90,396	Per 7-Year Cycle	2022	\$12,203
- Walls: Other		or			\$0	Operable Partition tough to operate		
- Casework		or			\$0			
- Interior Doors / Windows		or			\$0			
- ADA / Code Upgrades	\$10,000	or			\$10,000	Upgrade Miscellaneous Building Items	2027	\$3,600
- Asbestos Abatement		or	60,264	\$1.40	\$84,370	Pre 1989 CMU Walls	2027	\$30,373
-		or			\$0			
Building Systems								
- Food Service		or			\$0	Replace Hood, Cooler / Freezer (2015)	2035	\$0
- Food Service		or			\$0	Replace Dish Washer, Kitchen Equipment		
- Plumbing		or	2	\$10,000.00	\$20,000	Replace Water Heaters (2) 125 Gal	2027	\$7,200
- Fire Sprinkler		or			\$0			
- HVAC		or	60,264	\$4.00	\$241,056	Replace Chiller - Per 12 Year Cycle (2003)	2020	\$10,848
- HVAC		or	60,264		\$0	Replace Boilers - Per 20 Year Cycle (1 of 2 in 2017)	2037	\$0
- HVAC		or	60,264	\$14.00	\$843,696	Replace Indoor Air Units	2027	\$303,731
- HVAC		or	60,264	\$3.00	\$180,792	Replace HVAC Controls - Per 20 Year Cycle (2016)	2026	\$56,949
- Electrical		or			\$0			
- Fire Alarm		or	60,264	\$2.50	\$150,660	Full System Replacement - Per 20 Year Cycle	2019	\$0
- Security: Cameras	\$60,000	or			\$60,000	Full System Replacement - Per 6 Year Cycle (Replaced 2018)	2027	\$21,600
- Security: Intrusion	\$5,873	or			\$5,873	Full System Replacement - Per 20 Year Cycle	2027	\$2,114
- Intercom		or	60,264	\$1.10	\$66,290	Full System Replacement - Per 20 Year Cycle	2027	\$23,865
- Access Controls	\$20,000	or			\$20,000	S2 Door Access	2020	\$900
-		or			\$0			
Technology								
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle		
- UPS		or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or			\$0	Additional Drops		
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle		
-		or			\$0			
Facility Improvements Sub Total					\$3,791,733			
II B Support Costs								
Prof/Pm/Support Fees	10%				\$379,173		2025	\$102,377
Survey/Testing	1.5%				\$56,876		2027	\$20,475
Storage and Moving					\$0			
City Fees/County					\$0			
FF&E	3%				\$113,752	Allowance - Refresh	2027	\$40,951
Land Purchase					\$0			
Contingency	10%				\$379,173		2027	\$136,502
Support Costs Subtotal					\$928,975			
Program Subtotal					\$4,720,708			
Program Escalation					\$1,455,249			\$1,455,249
Program Total					\$6,175,957			



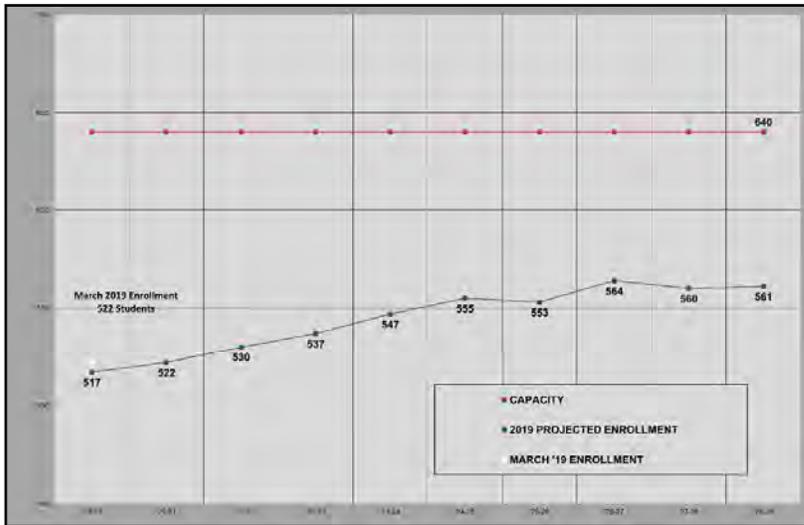
LITTLE RIVER ELEMENTARY

2315 SNOW HILL ROAD

- School #:** 340
- Building Size:** 83,620 Square Feet
- Grade Level:** PK-8
- Year Built:** 1993
- Site Size:** 23.2 Acres

SUMMARY

Little River Elementary School is one of eight prototype facilities build in the early 1990's and is currently at 80% capacity and will increase slightly over the next ten years but should not exceed capacity. The facility received a 20 year cycle renovation in 2015 and therefore the FCI is in the good range at 0.09, but over the next ten years the FCI will increase to .20 due to needs associated with roof and HVAC system replacement.



Current Capacity: 640 Students

Current Enrollment: 222 Students
82%

Projected Enrollment: 561 Students
88%

Square Feet per Student: 130.6 sf

Facility Condition Index: .20

New Construction: \$70,950

Current / Deferred Maintenance: \$4,980,541

Total Facility Needs: \$5,051,491



Durham Public Schools Capital Improvement Plan			Little River Elementary		495	Summary Sheet	
Category/Description	Campus Program Total		\$ 5,051,491		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A	Facility Improvements:						
	New Construction						
	- Addition	or			\$0	Currently at 82% Occupancy Level but will increase to 88%	
	- Canopies	or	1,000	\$55.00	\$55,000	Canopy at Student Drop-off in Rear (10 x 100)	2020 \$2,475
	-	or			\$0		
	Renovation						
	- 20 Year General Renovation	or	83,620		\$0	20-Year Cycle (1993) (2015)	2035 \$0
	- Security Vestibule	or			\$7,500	Develop Security Entrance at Back Hall	2020 \$338
	- Theater Arts Renovation	or			\$60,000	A/V, Lights, Rigging	2024 \$13,500
	Site						
	- Grading for New Construction	or			\$0		
	- Drainage / Erosion	or			\$0		
	- Landscaping / Grassing	or	\$5,000		\$5,000	Landscape Refresh	2020 \$225
	- Irrigation	or			\$0		
	- Athletic Field(s) / Playground(s)	or			\$0		
	- Athletic / Playground Equipment	or	\$25,000		\$25,000	Refresh K-2 Playground Equipment (Rusting)	2020 \$1,125
	- Parking Lot(s)	or	\$10,000		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2020 \$450
	- Parking Lot(s)	or			\$0		
	- Driveway(s) / Turn lane(s)	or	750	\$35.00	\$26,250	Pave Emergency / Fire Lane for Stacking & Student Drop	2027 \$9,450
	- Sidewalks	or			\$0		
	- ADA	or	\$7,500		\$7,500	Playground ADA Access	2019 \$0
	- Fencing	or	500	\$24.00	\$12,000	Add Fence at Play Area Just Outside Courtyard	2020 \$540
	- Site Lighting	or	\$15,000		\$15,000	DPS Owned System, Convert to LED	2027 \$5,400
	- Utilities	or			\$0		
	-	or			\$0		
	Building Envelope						
	- Structural	or			\$0		
	- Roof: Low Slope	or	\$1,381,026		\$1,381,026	Replace Main Building Roof	2020 \$62,146
	- Roof: Metal	or	\$88,838		\$88,838	Replace Canopies	2020 \$3,998
	- Roof: Skylights	or	\$30,323		\$30,323	Remove Skylights	2020 \$1,365
	- Exterior Walls	or	\$5,000		\$5,000	Pressure Wash Exterior	2020 \$225
	- Exterior Doors	or			\$0		
	- Storefronts / Window Walls	or			\$0		
	- Windows	or			\$0		
	Building Finishes						
	- Flooring: VCT / Vinyl	or			\$0		
	- Flooring: Hard Tile / Terrazzo	or			\$0		
	- Flooring: Sports Flooring	or			\$0		
	- Ceiling: AC1	or			\$0		
	- Ceiling: Other	or			\$0		
	- Walls: Painting	or	83,620	\$1.50	\$125,430	Per 7-Year Cycle	2022 \$16,933
	- Walls: Other	or			\$0		
	- Casework	or			\$0		
	- Interior Doors / Windows	or	30	\$500.00	\$15,000	Change Classroom Door Hardware (Thumb Latch on Interior of Door)	2019 \$0
	- ADA / Code Upgrades	or			\$0		
	- Asbestos Abatement	or			\$0		
	-	or			\$0		
	Building Systems						
	- Food Service	or			\$0	Replaced Hood (2015)	2035 \$0
	- Food Service	or			\$0	Replaced Cooler / Freezer & Dishwasher (2015)	2035 \$0
	- Plumbing	or	1	\$3,000.00	\$3,000	Replace Water Heaters (1) Flat Coil Unit	2022 \$405
	- Fire Sprinkler	or			\$0		
	- HVAC	or	83,620		\$0	Replace Chiller - Per 12 Year Cycle (2017)	2029 \$0
	- HVAC	or	83,620	\$2.00	\$167,240	Boiler Replacement - Per 20 Year Cycle	2022 \$22,577
	- HVAC	or	83,620	\$14.00	\$1,170,680	Replace Indoor Air Units (4 Pipe System)	2022 \$158,042
	- HVAC	or	83,620	\$3.00	\$250,860	Replace Controls - Per 20 Year Cycle (2016)	2026 \$79,021
	- Electrical	or	77,500	\$1.50	\$116,250	Replace Balance of T8s to LED	2022 \$15,694
	- Electrical	or			\$0		
	- Fire Alarm	or	83,620		\$0	Full System Replacement - Per 20 Year Cycle (2015)	2035 \$0
	- Security: Cameras	or	40	\$1,000.00	\$40,000	Upgrade Existing "Older" I.P. Cameras & Server (Request Add'l)	2026 \$12,600
	- Security: Intrusion	or	\$6,931		\$6,931	Head End Replacement - Per 20 Year Cycle	2027 \$2,495
	- Intercom	or			\$0	Full System Replacement - Per 20 Year Cycle (2015)	2035 \$0
	- Access Controls	or	\$20,000		\$20,000	S2 Door Access	2021 \$1,800
	Technology						
	- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle	
	- UPS	or			\$0	Replace - Per 5 Year Cycle	
	- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle	
	- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle	
	- Data Cabling / Racks	or			\$0	Additional Drops	
	- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle	
	-	or			\$0		
	Facility Improvements Sub Total				\$3,643,828		
II B	Support Costs						
	Prof/Pm/Support Fees		10%		\$364,383		2021 \$32,794
	Survey/Testing		1.5%		\$54,657		2022 \$7,379
	Storage and Moving				\$0		
	City Fees/County				\$0		
	FF&E		3%		\$109,315	Allowance - Refresh	2022 \$14,758
	Land Purchase				\$0		
	Contingency		10%		\$364,383		2022 \$49,192
	Support Costs Subtotal				\$892,738		
	Program Subtotal				\$4,536,566		
	Program Escalation				\$514,925		\$514,925
	Program Total				\$5,051,491		



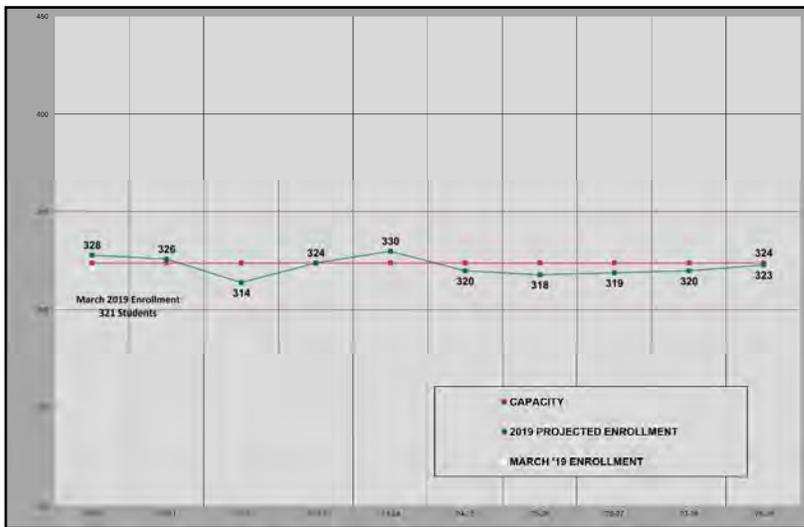
MANGUM ELEMENTARY

9008 QUAIL ROOST ROAD

- School #:** 348
- Building Size:** 54,838 Square Feet
- Grade Level:** K-5
- Year Built:** 1925, '39, '62, '83, '09
- Site Size:** 22.0 Acres

SUMMARY

Mangum Elementary School is one of the older schools in the District's inventory, built in 1925. There were additions made to the facility in 1939, 1962, 1983, 2003, and most recently in 2007 when a gym was built. The facility currently is currently at a 99% occupancy level and enrollment will increase slightly by 2023 to 330 students but will level off at 323 in 2028. For security reasons, the wing connectors should be enclosed or secured and the District should address 20 year cycle renovations, drainage / site issues, roofing, food service, HVAC Systems, and electrical systems over the next ten years.



Current Capacity: 324 Students

Current Enrollment: 321 Students
99%

Projected Enrollment: 323 Students
99%

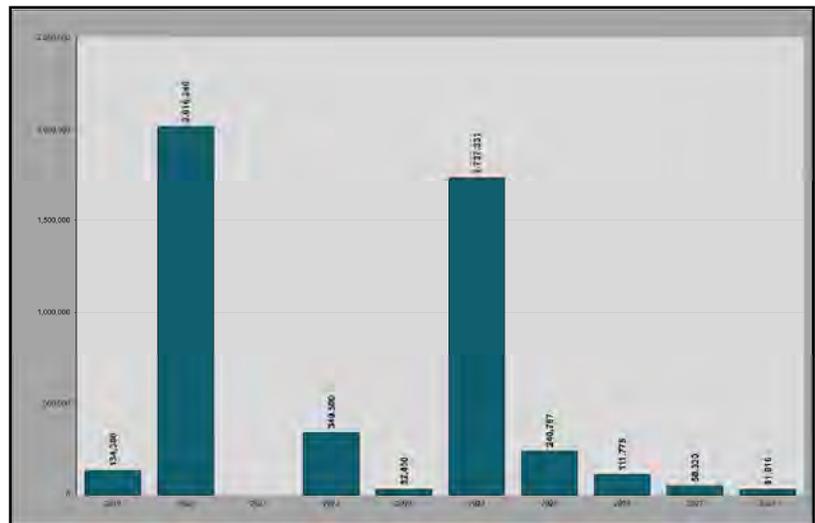
Square Feet per Student: 169.3 sf

Facility Condition Index: .28

New Construction: \$414,000

Current / Deferred Maintenance: \$4,280,698

Total Facility Needs: \$4,694,698



Durham Public Schools Capital Improvement Plan			Mangum Elementary		321	Summary Sheet	
Category/Description	Campus Program Total		\$ 4,694,698		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction					Currently at 99% Occupancy Level and will remain at 99%		
- Addition	or	1,500	\$200.00	\$300,000	Enclose Canopies between the Three Buildings (150' x 10')	2022	\$40,500
-	or			\$0			
Renovation							
- 20 Year Renovation	or	14,717		\$0	20-Year Cycle Renovation of 1983 Wing (2013)	2033	\$0
- 20 Year Renovation	or	28,121		\$0	20-Year Cycle Renovation of Remainder of Building	2029	\$0
- 20 Year Renovation	or	12,000	\$50.00	\$600,000	Renovate Building B Restrooms, Caf�, Kitchen and 1939 Classrooms	2020	\$27,000
- 20 Year Renovation	or	600	\$25.00	\$15,000	Renovate Athletic Field House	2020	\$675
- Security Vestibule	or			\$0	Develop Passive Security at Front Office (2019)		
- Theater Arts Renovation	or	\$60,000		\$60,000	A/V, Lights, Rigging	2024	\$13,500
Site							
- Grading for New Construction	or			\$0			
- Drainage / Erosion	or	\$7,500		\$7,500	Allowance: Erosion Issue at Sidewalk Leading to Athletic Fields	2019	\$0
- Drainage / Erosion	or	\$7,500		\$7,500	Allowance: Address Ponding Water at Courtyard	2019	\$0
- Drainage / Erosion	or	\$7,500		\$7,500	Drainage Issue on Front Playground	2019	\$0
- Drainage / Erosion	or		5,600	\$18.00	Retaining Wall	2019	\$0
- Landscaping / Grassing	or	\$5,000		\$5,000	Landscape Refresh	2020	\$225
- Landscaping / Grassing	or	\$5,000		\$5,000	Add Low Growth Plant at Athletic Field Retaining Wall Area	2020	\$225
- Irrigation	or			\$0			
- Athletic Field(s) / Playground(s)	or			\$0	Asphalt Playground Surface (2016)		
- Athletic Field(s) / Playground(s)	or	\$5,000		\$5,000	Replace Press Box @ Athletic Field	2023	\$900
- Athletic / Playground Equipment	or			\$0			
- Parking Lot(s)	or	\$10,000		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2020	\$480
- Driveway(s) / Turn Lane(s)	or		750	\$30.00	Pave Emergency Drive to Athletic Field (550' x 12')	2023	\$4,050
- Sidewalks	or			\$0			
- ADA	or	\$7,500		\$7,500	Playground ADA Access	2019	\$0
- Fencing	or			\$0			
- Site Lighting	or			\$0	Progress Energy Owned System		
- Utilities	or			\$0	Connect to Public Utilities when Possible		
-	or			\$0			
Building Envelope							
- Structural	or			\$0			
- Roof: Low Slope	or			\$0	Replace 1983 Addition Roof (2014)	2034	\$0
- Roof: Low Slope	or	\$110,376		\$110,376	Replace Main Building Roof	2024	\$24,835
- Roof: Low Slope	or	\$96,255		\$96,255	Replace Gym Addition Roof	2024	\$21,657
- Roof: Metal	or	\$43,000		\$43,000	Replace Canopy B Roofs	2020	\$1,935
- Roof: Metal	or	\$18,850		\$18,850	Replace Gym Canopy Roofs	2020	\$848
- Exterior Walls	or			\$0			
- Exterior Doors	or			\$0			
- Storefronts / Window Walls	or			\$0			
- Windows	or			\$0			
-	or			\$0			
Building Finishes							
- Flooring: VCT / Vinyl	or			\$0			
- Flooring: Hard Tile / Terrazzo	or			\$0			
- Flooring: Sports Flooring	or			\$0			
- Ceiling: ACT	or			\$0			
- Ceiling: Other	or			\$0			
- Walls: Painting	or	54,838	\$1.50	\$82,257	Per 7-Year Cycle	2020	\$3,702
- Walls: Other	or			\$0			
- Casework	or			\$0			
- Interior Doors / Windows	or			\$0			
- ADA / Code Upgrades	or			\$0	Upgrade Miscellaneous Building Items / Automatic Door Openers	2029	\$0
- Asbestos Abatement	or	42,838		\$0	Pre 1989 CMU Walls	2029	\$0
-	or			\$0			
Building Systems							
- Food Service	or	\$250,000		\$250,000	Replace Hood, Dish Washer, Cooler / Freezer	2020	\$11,250
- Food Service	or	\$85,000		\$85,000	Refresh Kitchen Equipment	2026	\$26,775
- Food Service	or	\$30,000		\$30,000	Replace Grease Trap	2020	\$1,350
- Plumbing	or		1	\$10,000.00	Replace Water Heater (1) 125 Gal	2020	\$450
- Plumbing	or	\$25,000		\$25,000	Allowance: Replace Well / Water Tower (25k Gal)	2020	\$1,125
- Fire Sprinkler	or			\$0			
- HVAC	or	54,838	\$18.00	\$987,084	Replace RTUs (With Roof Project)	2024	\$222,094
- HVAC	or	54,838	\$3.00	\$164,514	Replace Controls - Per 20 Year Cycle	2024	\$37,016
- Electrical	or	14,717	\$1.50	\$22,076	Replace Balance of T8s to LED	2028	\$8,941
- Electrical	or	\$3,500		\$3,500	Investigate: Replace Switchgear	2019	\$0
- Fire Alarm	or	54,838	\$2.50	\$137,095	Full System Replacement - Per 20 -Year Cycle	2025	\$37,016
- Security: Cameras	or	37	\$1,000.00	\$37,000	Upgrade Existing "Older" IP Cameras & Storage	2027	\$13,320
- Security: Intrusion	or	\$5,873		\$5,873	Head End Replacement - Per 20 -Year Cycle	2025	\$1,586
- Intercom	or	54,838	\$0.85	\$46,612	Full System Replacement - Per 20 -Year Cycle	2025	\$12,585
- Access Controls	or	\$20,000		\$20,000	S2 Door Access	2020	\$900
-	or			\$0			
Technology							
- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle		
- UPS	or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks	or			\$0	Additional Drops		
- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle		
-	or			\$0			
Facility Improvements Sub Total				\$3,327,792			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$332,779		2020	\$14,975
Survey/Testing	1.5%			\$49,917		2020	\$2,246
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3%			\$99,834	Allowance - Refresh +/- 1/3 Furniture - (15 Year Cycle)	2020	\$4,493
Land Purchase				\$0			
Contingency	10%			\$332,779		2020	\$14,975
Support Costs Subtotal				\$815,309			
Program Subtotal				\$4,143,101			
Program Escalation				\$551,598			\$551,598
Program Total				\$4,694,698			



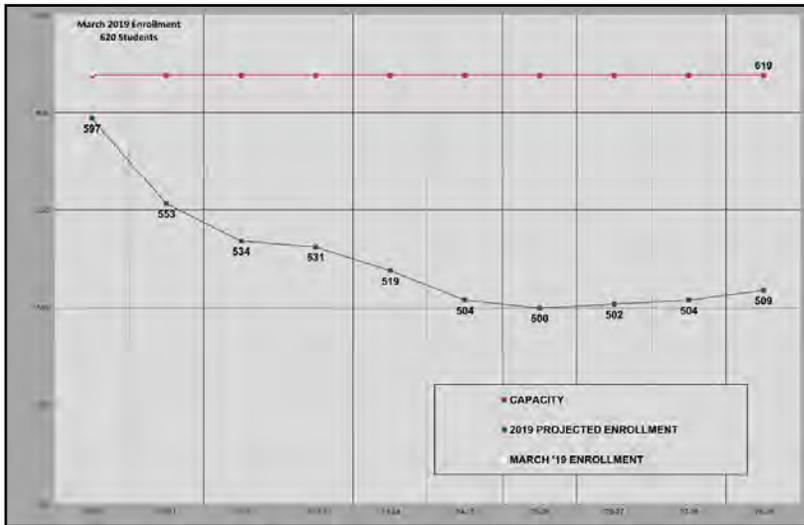
MERRICK-MOORE ELEMENTARY

2325 CHEEK ROAD

- School #:** 352
- Building Size:** 103,075 Square Feet
- Grade Level:** K-5
- Year Built:** 1951, '53, '58, '81
- Site Size:** 16.3 Acres

SUMMARY

Merrick Moore Elementary School is at 100% capacity but will decrease to 500 students or 81% in 2025 before increasing to 509 in 2028. Once the enrollment falls below the facility's capacity, it is recommended that the existing four (4) mobile units be removed from the site once the student population decreases. For security reasons, the wing connectors should be enclosed or secured and the District should address 20 year cycle renovations, parking lot issues, and electrical systems over the next ten years.



Current Capacity: 619 Students

Current Enrollment: 620 Students
100%

Projected Enrollment: 509 Students
82%

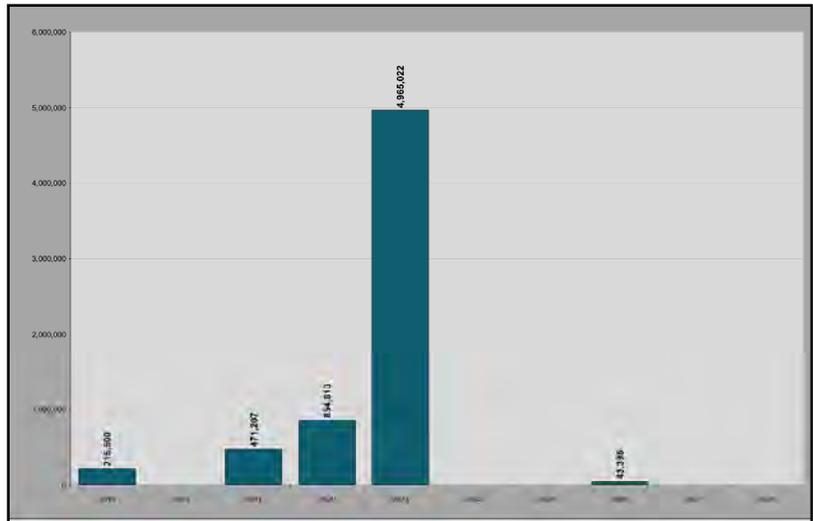
Square Feet per Student: 166.5 sf

Facility Condition Index: .17

New Construction: \$414,000

Current / Deferred Maintenance: \$6,135,937

Total Facility Needs: \$6,549,937



Durham Public Schools Capital Improvement Plan			Merrick-Moore Elementary		621	Summary Sheet	
Category/Description	Campus Program Total		\$ 5,549,937		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction					Has (4) Modular Units		
- Addition	or			\$0	Currently at 100% Occupancy Level but will decrease to 82%		
- Addition	or	1,500	\$200.00	\$300,000	Add Enclosed Connector (125' x 14')	2022	\$40,500
-	or			\$0			
Renovation							
- 20 Year Renovation	or	7,500		\$0	20-Year Cycle Renovation (Kitchen & Cafe) (2018)	2038	\$0
- 20 Year Renovation	or	95,575	\$25.00	\$2,389,375	20-Year Cycle Renovation (Balance of Facility)	2023	\$430,088
- 20 Year Renovation	or	4	\$50,000.00	\$200,000	Renovate Group Restrooms (Plumbing in Bad Shape)	2023	\$36,000
- Theater Arts Renovation	or	\$60,000		\$60,000	A/V, Lights, Rigging	2023	\$10,800
-	or						
Site							
- Grading for New Construction	or			\$0			
- Drainage / Erosion	or			\$0			
- Landscaping / Grassing	or	\$5,000		\$5,000	Landscape Refresh	2023	\$900
- Irrigation	or			\$0			
- Athletic Field(s) / Playground(s)	or			\$0			
- Athletic / Playground Equipment	or			\$0			
- Parking Lot(s)	or	\$10,000		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2019	\$0
- Parking Lot(s)	or	8,500	\$18.00	\$153,000	Allowance: All Parking Lots "Really Bad" / Resurface	2019	\$0
- Driveway(s) / Turn Lane(s)	or			\$0			
- Sidewalks	or			\$0			
- ADA	or	\$7,500		\$7,500	Playground ADA Access	2019	\$0
- Fencing	or			\$0			
- Site Lighting	or	\$20,000		\$20,000	DPS & Duke Owned System & Add Additional Lights	2019	\$0
- Utilities	or			\$0			
-	or			\$0			
Building Envelope							
- Structural	or			\$0			
- Roof: Low Slope	or			\$0	All Roof Areas Replaced in 2012	2032	\$0
- Roof: Metal	or			\$0			
- Roof: Shingle	or			\$0			
- Exterior Walls	or	\$5,000		\$5,000	Pressure Wash Exterior	2019	\$0
- Exterior Walls	or	\$20,000		\$20,000	Paint Raw CMU at Exterior of Building (Multiple Locations)	2019	\$0
- Exterior Doors	or			\$0			
- Storefronts / Window Walls	or			\$0			
- Windows	or			\$0			
-	or			\$0			
Building Finishes							
- Flooring: VCT / Vinyl	or			\$0			
- Flooring: Hard Tile / TerraZzo	or			\$0			
- Flooring: Sports Flooring	or			\$0			
- Ceiling: ACT	or			\$0			
- Ceiling: Other	or			\$0			
- Walls: Painting	or	103,075	\$1.50	\$154,613	Per 7-Year Cycle (With 20 Year Renovation)	2023	\$27,830
- Walls: Other	or			\$0			
- Casework	or			\$0			
- Interior Doors / Windows	or	60	\$500.00	\$30,000	Update Doors & Hardware to DPS Standards	2023	\$5,400
- ADA / Code Upgrades	or	\$10,000		\$10,000	Ramps	2023	\$1,800
- Asbestos Abatement	or	103,075	\$1.40	\$144,305	Pre 1989 CMU Walls	2023	\$25,975
-	or			\$0			
Building Systems							
- Food Service	or	\$85,000		\$85,000	Refresh Kitchen Equipment	2023	\$15,300
- Plumbing	or	8	\$500.00	\$4,000	Replace Hose Bibs	2023	\$720
- Fire Sprinkler	or			\$0			
- HVAC	or	103,075	\$4.00	\$412,300	Replace Chiller - Per 12 Year Cycle (2009)	2021	\$37,107
- HVAC	or	103,075		\$0	Replace Boiler (2009)	2029	\$0
- HVAC	or	103,075		\$0	Replaced Indoor Air Units & Converted from 2 pipe to 4 pipe (2009)	2029	\$0
- HVAC	or	103,075		\$0	Replace Controls - Per 20 Year Cycle (2009)	2029	\$0
- Electrical	or	82,000	\$1.50	\$123,000	Replace Balance of T8s to LED	2023	\$22,140
- Fire Alarm	or	103,075	\$2.50	\$257,688	Full System Replacement - Per 20 Year Cycle	2023	\$46,384
- Security: Cameras	or	33	\$1,000.00	\$33,000	Upgrade Existing "Older" I.P. Cameras & Storage (Survey)	2026	\$10,395
- Security: Intrusion	or			\$0	Head End Replacement - Per 20 Year Cycle (2013)	2033	\$0
- Intercom	or	103,075	\$0.85	\$87,614	Full System Replacement - Per 20 Year Cycle	2023	\$15,770
- Access Controls	or	\$20,000		\$20,000	S2 Door Access	2021	\$1,800
-	or			\$0			
Technology							
- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle		
- UPS	or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks	or			\$0	Additional Drops		
- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle		
-	or			\$0			
Facility Improvements Sub Total				\$4,531,394			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$453,139		2022	\$61,174
Survey/Testing	1.5%			\$67,971		2023	\$12,235
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3%			\$135,942	Allowance - Refresh	2023	\$24,470
Land Purchase				\$0			
Contingency	10%			\$453,139		2023	\$81,565
Support Costs Subtotal				\$1,110,191			
Program Subtotal				\$5,641,585			
Program Escalation				\$908,352			\$908,352
Program Total				\$6,549,937			



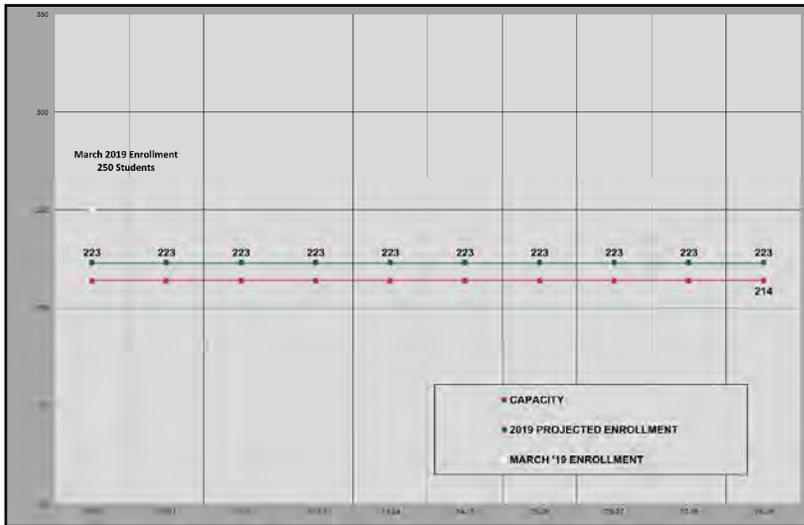
MOREHEAD ELEMENTARY

909 COBB STREET

- School #:** 354
- Building Size:** 40,861 Square Feet
- Grade Level:** PK-5
- Year Built:** 1958, '09
- Site Size:** 4.9 Acres

SUMMARY

Moorehead Elementary is a Montessori School with a capacity of 214 students. However, it is currently over capacity by 17% and it is anticipated to remain slightly over capacity through 2028. An addition is proposed but adding classrooms space to the confined site will be challenging so consideration should be given to decreasing student enrollment in an alternative method such as redistricting or cap enrollment. The current FCI is 0.01 but will increase to 0.25 in 2028 if the current and deferred maintenance that includes a partial 20 year cycle renovations, site / playground / parking lot repairs, roofing, and food service equipment replacement are not addressed.



Current Capacity: 214 Students

Current Enrollment: 250 Students
117%

Projected Enrollment: 223 Students
104%

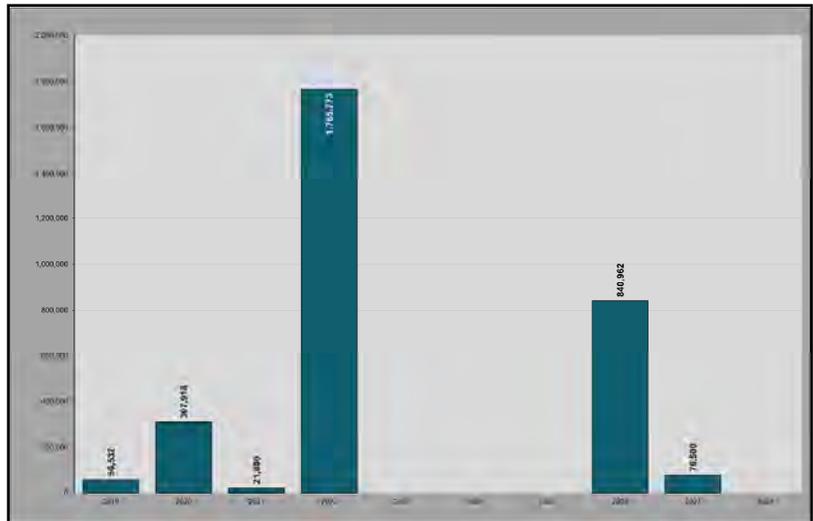
Square Feet per Student: 190.9 sf

Facility Condition Index: .25

New Construction: \$993,570

Current / Deferred Maintenance: \$2,135,915

Total Facility Needs: \$3,069,485



Durham Public Schools Capital Improvement Plan			Morehead Elementary		223	Summary Sheet	
Category/Description	Campus Program Total		\$ 3,069,485		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction					Currently at 117% Occupancy Level but will decrease to 104%		
- Addition	or	2,000	\$200.00	\$400,000	Two (2) Classroom Addition (Limited Space on Campus)	2022	\$54,000
- Addition	or	560	\$200.00	\$112,000	Enclose Canopy to Annex Building (Storefront 70 x 8)	2022	\$15,120
- Canopies	or	900	\$55.00	\$49,500	Extend Canopy at Front of School (3 Extensions 10'x30' ea.)	2022	\$6,683
-	or			\$0			
Renovation							
- 20 Year Renovation	or	4,000	\$25.00	\$100,000	Cafeteria / Kitchen Renovation	2022	\$13,500
- 20 Year Renovation	or			\$0	Renovated in 2009 (Full Building, HVAC, Roof)	2029	\$0
- Security Vestibule	or			\$0	Develop Passive Security at Front Office (2019)		
- Theater Arts Renovation	or	\$60,000		\$60,000	A/V, Lights, Rigging	2022	\$8,100
-	or						
Site							
- Grading for New Construction	or	\$115,000		\$115,000	Site Prep for Addition	2022	\$15,525
- Drainage / Erosion	or	\$5,000		\$5,000	Increase Height of Timber Retaining Wall at Amphitheater (50' x 2.5')	2020	\$225
- Landscaping / Grassing	or	\$5,000		\$5,000	Landscape Refresh	2022	\$675
- Irrigation	or			\$0			
- Athletic Field(s) / Playground(s)	or	\$10,000		\$10,000	Top Dress Playground to be Level	2022	\$1,350
- Athletic Field(s) / Playground(s)	or	\$10,000		\$10,000	Repave Basketball Court	2022	\$1,350
- Athletic Field(s) / Playground(s)	or	\$10,000		\$10,000	Refresh (3) Playgrounds (Individual Tile Replacement approx. 50)	2022	\$1,350
- Athletic / Playground Equipment	or			\$0			
- Parking Lot(s)	or	\$10,000		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2022	\$1,350
- Driveway(s) / Turn lane(s)	or			\$0			
- Sidewalks	or	500	\$10.00	\$5,000	Repair / Replace 6ft Wide Sidewalks	2022	\$675
- Exterior Stairs	or	\$10,000		\$10,000	Repair Exterior Stairs / Replace Nosings	2022	\$1,350
- ADA	or	550	\$20.00	\$11,000	Pave Gravel Walking Track (800LF)	2020	\$495
- Fencing	or	1,500	\$36.00	\$54,000	Replace 8ft Black Vinyl Site Fencing	2020	\$2,430
- Site Lighting	or			\$0	Duke Power Owned System		
- Utilities	or			\$0			
-	or			\$0			
Building Envelope							
- Structural	or	\$5,000		\$5,000	Investigation - Settlement Cracks(Media Corridor, Retaining Walls/Stairs to Mach. Rm)	2019	\$0
- Roof: Low Slope	or	\$554,515		\$554,515	Replace Main Bldg., Canopies and Classrooms	2026	\$174,872
- Roof: Metal	or			\$0			
- Roof: Shingle	or			\$0			
- Exterior Walls	or	\$5,000		\$5,000	Pressure Wash Exterior	2020	\$225
- Exterior Doors	or			\$0			
- Storefronts / Window Walls	or			\$0			
- Windows	or			\$0			
- Envelope	or	\$5,000		\$5,000	Investigate - Envelope to Prevent Water Intrusion	2019	\$0
-	or			\$0			
Building Finishes							
- Flooring: VCT / Vinyl	or			\$0			
- Flooring: Hard Tile / Terrazzo	or			\$0			
- Flooring: Sports Flooring	or	3,000	\$3.00	\$9,000	Refinish Gym Floor	2020	\$405
- Ceiling: ACT	or			\$0			
- Ceiling: Other	or	\$7,500		\$7,500	Remove / Replace Sound Panels at Gym	2022	\$1,013
- Walls: Painting	or	40,861	\$1.50	\$61,292	Per 7-Year Cycle	2022	\$8,274
- Walls: Other	or			\$0			
- Casework	or			\$0			
- Interior Doors / Windows	or			\$0			
- ADA / Code Upgrades	or			\$0			
- Asbestos Abatement	or	40,861		\$0	Pre 1989 CMU Walls	2030	\$0
-	or			\$0			
Building Systems							
- Food Service	or	\$250,000		\$250,000	Replace Hood, Dish Washer, Cooler / Freezer	2022	\$33,750
- Food Service	or	\$85,000		\$85,000	Refresh Kitchen Equipment	2026	\$26,775
- Plumbing	or	1	\$1,500.00	\$1,500	Replace Water Coolers in Cafeteria (1) High / Low	2019	\$0
- Plumbing	or	1	\$10,000.00	\$10,000	Replace Water Heater (1) 125 Gal	2022	\$1,350
- Fire Sprinkler	or			\$0			
- HVAC	or	40,861		\$0	Replace RTUs (2009)	2029	\$0
- HVAC	or	40,861		\$0	Replace Controls (2009)	2029	\$0
- HVAC	or	\$3,500		\$3,500	Investigate - Humidity Issues in Arts Pod (Dehumidifiers Run all the time)	2019	\$0
- Electrical	or			\$0			
- Electrical	or			\$0	Replaced Interior Lighting to LED Lighting (2017)		
- Electrical	or	\$25,000		\$25,000	Main Electrical Room is Low and prone to flooding (sub-floor)	2022	\$3,375
- Fire Alarm	or	48,861		\$0	Full System Replacement - Per 20 -Year Cycle (2009)	2029	\$0
- Security: Cameras	or	\$56,250		\$56,250	Full System Replacement - Per 6 - Year Cycle (2018)	2027	\$20,250
- Security: Intrusion	or	48,861		\$0	Head End Replacement - Per 20 - Year Cycle (2013)	2033	\$0
- Intercom	or	48,861	\$0.85	\$41,532	Full System Replacement - Per 20 - Year Cycle (2009)	2019	\$0
- Access Controls	or	\$20,000		\$20,000	S2 Door Access	2021	\$1,800
-	or			\$0			
Technology							
- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle		
- UPS	or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks	or			\$0	Additional Drops		
- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle		
-	or			\$0			
Facility Improvements Sub Total				\$2,106,588			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$210,659		2020	\$9,480
Survey/Testing	1.5%			\$31,599		2022	\$4,266
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3%			\$63,198	Allowance - Refresh	2022	\$8,532
Land Purchase				\$0			
Contingency	10%			\$210,659		2022	\$28,439
Support Costs Subtotal				\$516,114			
Program Subtotal				\$2,622,702			
Program Escalation				\$446,783			\$446,783
Program Total				\$3,069,485			



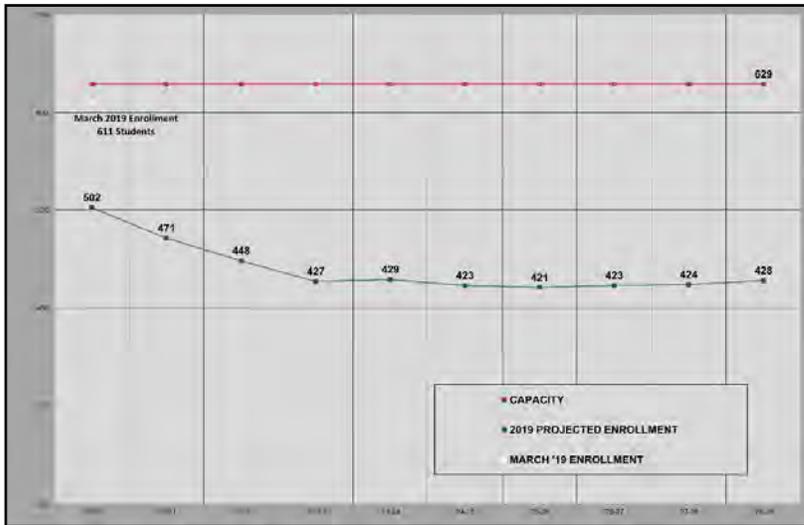
OAK GROVE ELEMENTARY

3810 WAKE FOREST ROAD

- School #:** 360
- Building Size:** 96,061 Square Feet
- Grade Level:** PK-5
- Year Built:** 1981, '93
- Site Size:** 15.7 Acres

SUMMARY

Oak Grove Elementary School was opened in 1981 and had additions to the facility in 1993 and 2003. It currently has a capacity of 629 students and is slightly under said capacity with an enrollment of 611 students. Over the next ten years, enrollment is expected to decline with an enrollment low of 428 students in 2028, representing an occupancy level of 68%. In 2015, the facility received a 20 year cycle renovation (1981 building) and the roof of the same building was replaced in 2017. However, The two additions will need similar work over the next ten years as well as facility wide maintenance associated with parking lots and HVAC systems. If no work is undertaken by 2028, the FCI will 0.17.



Current Capacity: 629 Students

Current Enrollment: 611 Students
97%

Projected Enrollment: 428 Students
68%

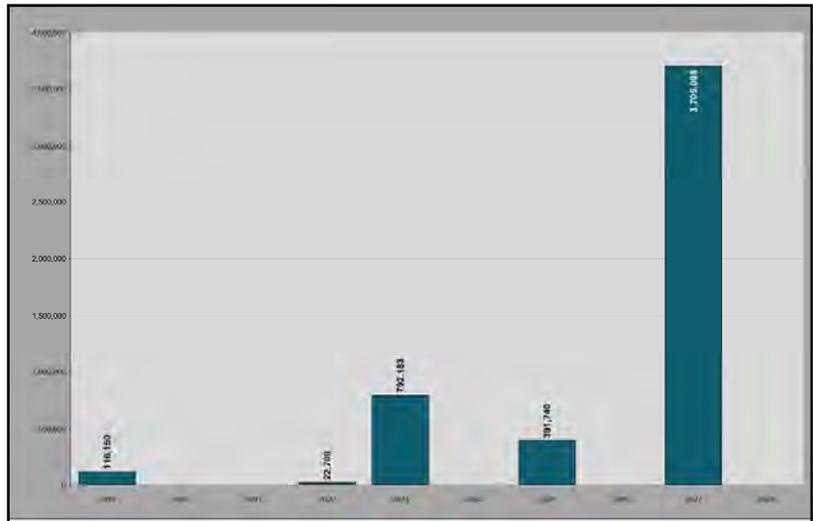
Square Feet per Student: 152.7 sf

Facility Condition Index: .17

New Construction: \$0

Current / Deferred Maintenance: \$5,027,871

Total Facility Needs: \$5,027,871



Durham Public Schools Capital Improvement Plan			Oak Grove Elementary		534	Summary Sheet	
Category/Description	Campus Program Total		\$ 5,027,871		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A	Facility Improvements:						
	New Construction						
- Addition		or			\$0	Currently at 97% Occupancy Level and will decrease to 68%	
-		or			\$0		
	Renovation						
- 20 Year Renovation		or	88,561		\$0	20-Year Cycle Renovation (2015)	2035 \$0
- 20 Year Renovation		or	7,500	\$25.00	\$187,500	1981, 2003 Buildings	2023 \$33,750
- Theater Arts Renovation	\$60,000	or			\$60,000	A/V, Lights, Rigging	2023 \$10,800
	Site						
- Grading for New Construction		or			\$0		
- Drainage / Erosion		or			\$0		
- Landscaping / Grassing	\$5,000	or			\$5,000	Landscape Refresh	2023 \$900
- Irrigation		or			\$0		
- Athletic Field(s) / Playground(s)		or			\$0		
- Athletic / Playground Equipment		or			\$0		
- Parking Lot(s)		or	11,000	\$18.00	\$198,000	Staff Parking & Drop Off Asphalt Overlay / Repair	2023 \$35,640
- Driveway(s) / Turn lane(s)		or			\$0		
- Sidewalks		or			\$0		
- ADA	\$7,500	or			\$7,500	Playground ADA Access	2019 \$0
- Fencing		or			\$0		
- Site Lighting		or			\$0	Duke Power Owned System	
- Utilities		or			\$0		
-		or			\$0		
	Building Envelope						
- Structural		or			\$0		
- Roof: Low Slope		or	91,521		\$0	Replace 1981, 1993 Main Building Roof (2017)	2037 \$0
- Roof: Low Slope		or	4,540	\$12.50	\$56,750	Replace 2003 Building Roof	2023 \$10,215
- Roof: Metal		or			\$0	Main Building Canopies and Storage (1991)	2031 \$0
- Roof: Shingle		or			\$0		
- Exterior Walls	\$5,000	or			\$5,000	Pressure Wash Exterior	2019 \$0
- Exterior Doors		or			\$0		
- Storefronts / Window Walls		or			\$0		
- Windows		or			\$0		
-		or			\$0		
	Building Finishes						
- Flooring: VCT / Vinyl		or	500	\$3.00	\$1,500	Replace Damaged / Discolored VCT in Gym Storage, Misc. Areas	2019 \$0
- Flooring: Hard Tile / Terrazzo		or			\$0		
- Flooring: Sports Flooring		or			\$0		
- Ceiling: ACT		or			\$0		
- Ceiling: Other		or			\$0		
- Walls: Painting		or	96,061	\$1.50	\$144,092	Per 7-Year Cycle	2023 \$25,936
- Walls: Other		or			\$0		
- Casework		or			\$0		
- Interior Doors / Windows		or			\$0		
- ADA / Code Upgrades		or			\$0		
- Asbestos Abatement		or	3,500		\$0	Pre 1989 CMU Walls	2035 \$0
-		or			\$0		
	Building Systems						
- Food Service		or			\$0	Replace Hood & Cooler / Freezer (2015)	2035 \$0
- Food Service		or			\$0	Refresh Kitchen Equipment	2030 \$0
- Plumbing		or	2	\$10,000.00	\$20,000	Replace Water Heaters (2) 125 Gal	2023 \$3,600
- Fire Sprinkler		or			\$0		
- HVAC		or	4,540	\$22.50	\$102,150	HVAC for 2003 Building	2019 \$0
- HVAC		or	91,521	\$4.00	\$366,084	Replace Chiller - Per 12 Year Cycle (2015)	2027 \$131,790
- HVAC		or	91,521	\$2.00	\$183,042	Replace (2) Boilers - Per 20 Year Cycle	2027 \$65,895
- HVAC		or	91,521	\$14.00	\$1,281,294	Replace Indoor Air Units (4 Pipe System)	2027 \$461,266
- HVAC		or	91,521	\$3.00	\$274,563	Controls Upgrade - Per 20 Year Cycle (2016)	2027 \$98,843
- Electrical		or	92,061	\$1.50	\$138,092	Replace Balance of T8s to LED	2027 \$49,713
- Fire Alarm		or	96,061		\$0	Full System Replacement - Per 20 Year Cycle (2015)	2035 \$0
- Security: Cameras		or	34	\$1,000.00	\$34,000	Upgrade Existing "Older" I.P. Cameras	2027 \$12,240
- Security: Intrusion		or	96,061		\$0	Full System Replacement - Per 20 Year Cycle (2015)	2035 \$0
- Intercom		or	96,061		\$0	Full System Replacement - Per 20 Year Cycle (2015)	2035 \$0
- Access Controls	\$20,000	or			\$20,000	S2 Door Access	2022 \$2,700
-		or			\$0		
	Technology						
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle	
- UPS		or			\$0	Replace - Per 5 Year Cycle	
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle	
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle	
- Data Cabling / Racks		or			\$0	Additional Drops	
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle	
-		or			\$0		
	Facility Improvements Sub Total				\$3,084,566		
II B	Support Costs						
Prof/Pm/Support Fees	10%				\$308,457		2025 \$83,283
Survey/Testing	1.5%				\$46,268		2027 \$16,657
Storage and Moving					\$0		
City Fees/County					\$0		
FF&E	3%				\$92,537	Allowance - Refresh	2027 \$33,313
Land Purchase					\$0		
Contingency	10%				\$308,457		2027 \$111,044
	Support Costs Subtotal				\$755,719		
	Program Subtotal				\$3,840,285		
	Program Escalation				\$1,187,586		\$1,187,586
	Program Total				\$5,027,871		



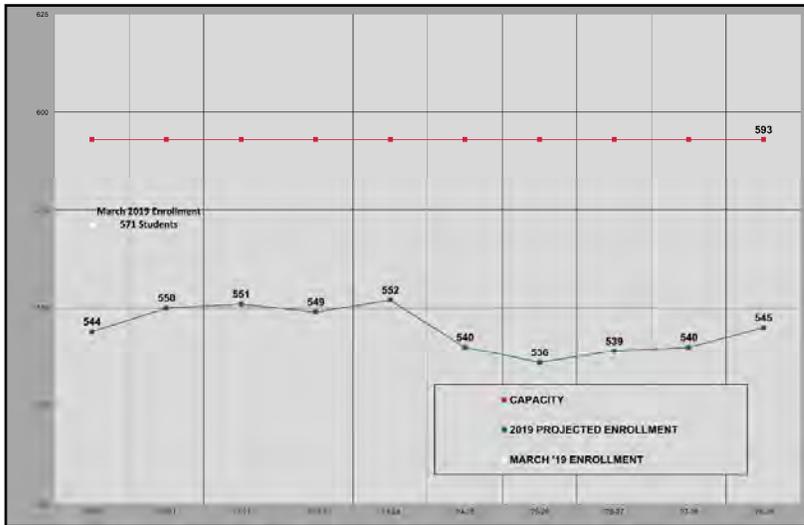
PARKWOOD ELEMENTARY

5207 REVERE ROAD

- School #:** 362
- Building Size:** 79,063 Square Feet
- Grade Level:** PK-5
- Year Built:** 1967, '83, '89, '92, '05, '13
- Site Size:** 22.5 Acres

SUMMARY

Parkwood Elementary School is just under full capacity with 571 students and will slightly decrease to 552 in 2023 and then to 545 in 2028. Overall, enrollment is not expected to exceed the 965 occupancy level and therefore the six mobile units on campus should be phase out of use and removed to enhance facility security. Approximately half of the facility received a 20 year cycle renovation in 2013 which included roof replacement. The boiler(s) were replaced in 2017 but the balance of the HVAC system will require work over the next ten years.



Current Capacity: 593 Students

Current Enrollment: 571 Students
96%

Projected Enrollment: 545 Students
92%

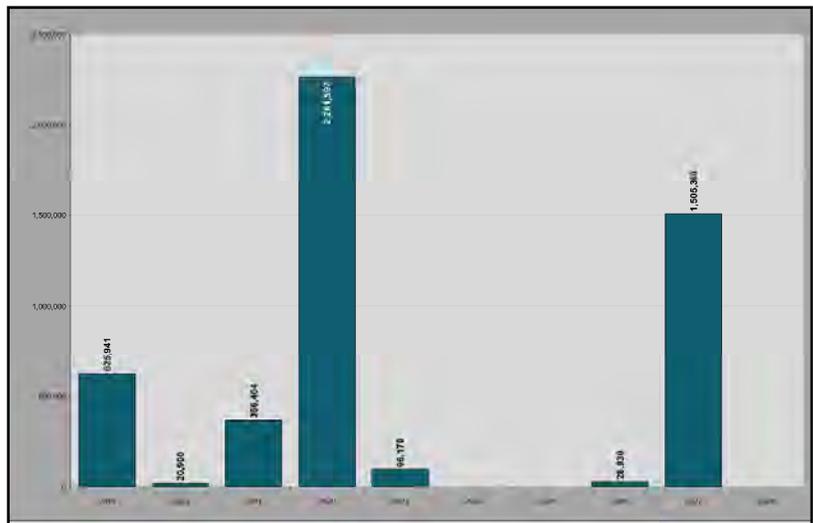
Square Feet per Student: 133.3 sf

Facility Condition Index: .20

New Construction: \$0

Current / Deferred Maintenance: \$4,905,301

Total Facility Needs: \$4,905,301



Durham Public Schools Capital Improvement Plan			Parkwood Elementary		546	Summary Sheet		
Category/Description	Campus Program Total		\$ 4,905,301		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A Facility Improvements:								
New Construction					Six (6) Mob Units - 4 no longer used (demo / remove)			
- Addition		or		\$0	Currently at 96% Occupancy Level and will decrease to 92%			
- Addition		or		\$0				
-		or		\$0				
Renovation								
- 20 Year Renovation		or	48,063	\$25.00	\$1,201,575	Building B, C, D, E - 20 Year Cycle Renovation (1989, 1992)	2022	\$162,213
- 20 Year Renovation		or	41,000		\$0	20 Year Renovation of Building A (2013)	2033	\$0
- Theater Arts Renovation	\$60,000	or			\$60,000	A/V, Lights, Rigging	2022	\$8,100
Site								
- Grading for New Construction		or			\$0			
- Drainage / Erosion		or			\$0			
- Landscaping / Grassing	\$5,000	or			\$5,000	Landscape Refresh	2022	\$675
- Irrigation		or			\$0			
- Athletic Field(s) / Playground(s)		or			\$0			
- Athletic / Playground Equipment		or			\$0			
- Parking Lot(s)	\$10,000	or			\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2019	\$0
- Driveway(s) / Turn lane(s)		or	2,000	\$25.00	\$50,000	Pave Emergency Drive (1,500 LF)	2019	\$0
- Sidewalks		or			\$0			
- ADA	\$7,500	or			\$7,500	Playground ADA Access	2019	\$0
- Fencing		or			\$0			
- Site Lighting		or			\$0	Duke Energy Owned System		
- Utilities		or			\$0	New Backflow Devices (2018)		
-		or			\$0			
Building Envelope								
- Structural		or			\$0			
- Roof: Low Slope		or			\$0	Complete Roof Replacement (2013)	2033	\$0
- Roof: Metal		or			\$0	Canopy Roof Project (83/89, 89/93, 89 Translucent) (2018)	2048	\$0
- Roof: Shingle		or			\$0			
- Exterior Walls	\$5,000	or			\$5,000	Pressure Wash Exterior	2019	\$0
- Exterior Doors		or			\$0			
- Storefronts / Window Walls		or			\$0			
- Windows		or			\$0			
-		or			\$0			
Building Finishes								
- Flooring: VCT / Vinyl		or			\$0			
- Flooring: Hard Tile / Terrazzo		or			\$0			
- Flooring: Sports Flooring		or			\$0			
- Ceiling: ACT		or			\$0			
- Ceiling: Other		or			\$0			
- Walls: Painting		or	41,000	\$1.50	\$61,500	Per 7-Year Cycle (With 20 Year Renovation)	2022	\$8,303
- Walls: Other		or			\$0			
- Casework		or			\$0			
- Interior Doors / Windows		or			\$0			
- ADA / Code Upgrades		or			\$0			
- Asbestos Abatement		or	41,000	\$1.40	\$57,400	Pre 1989 CMU Walls	2022	\$7,749
- Other		or	300	\$175.00	\$52,500	Replace Gym Bleachers	2022	\$7,088
-		or			\$0			
Building Systems								
- Food Service		or			\$0	Replaced in 2012	2032	\$0
- Plumbing		or	2	\$10,000.00	\$20,000	Replace Water Heaters (2) 125 Gal	2023	\$3,600
- Fire Sprinkler		or			\$0			
- HVAC		or	79,063	\$4.00	\$316,252	Replace Chiller & Tower	2019	\$0
- HVAC		or	79,063		\$0	Replace Boiler - Per 20 Year Cycle (2017)	2037	\$0
- HVAC		or	79,063	\$14.00	\$1,106,882	Replace Indoor Air Units (4 Pipe System)	2027	\$398,478
- HVAC		or	79,063	\$3.00	\$237,189	Replace Controls - Per 20 Year Cycle	2019	\$0
- Electrical		or	41,000	\$1.50	\$61,500	Replace Balance of T8s to LED (40% of the school)	2023	\$11,070
- Fire Alarm		or	79,063		\$0	Full System Replacement - Per 20 Year Cycle (2013)	2033	\$0
- Security: Cameras		or	22	\$1,000.00	\$22,000	Upgrade Existing "Older" I.P. Cameras & Storage	2026	\$6,930
- Security: Intrusion		or			\$0	Head End Replacement - Per 20 Year Cycle	2028	\$0
- Intercom		or	79,063	\$0.85	\$67,204	Full System Replacement - Per 20 Year Cycle (2013)	2022	\$9,072
- Access Controls	\$20,000	or			\$20,000	S2 Door Access	2020	\$900
-		or			\$0			
Technology								
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle		
- UPS		or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or			\$0	Additional Drops		
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle		
-		or			\$0			
Facility Improvements Sub Total					\$3,361,502			
II B Support Costs								
Prof/Pm/Support Fees	10%				\$336,150		2021	\$30,254
Survey/Testing	1.5%				\$50,423		2022	\$6,807
Storage and Moving					\$0			
City Fees/County					\$0			
FF&E	3%				\$100,845	Allowance - Refresh	2022	\$13,614
Land Purchase					\$0			
Contingency	10%				\$336,150		2022	\$45,380
Support Costs Subtotal					\$823,568			
Program Subtotal					\$4,185,069			
Program Escalation					\$720,232			\$720,232
Program Total					\$4,905,301			



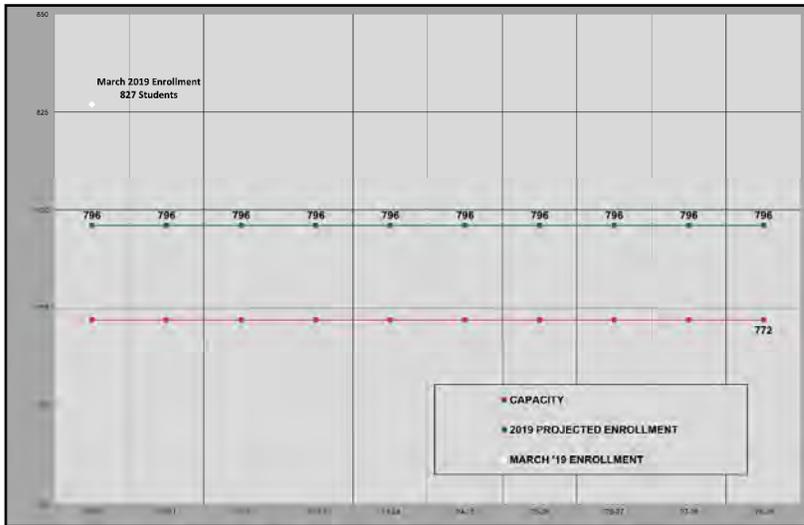
PEARSONTOWN ELEMENTARY

4915 BARBEE ROAD

- School #:** 364
- Building Size:** 108,471 Square Feet
- Grade Level:** PK-5
- Year Built:** 1954, '58, '64, '92
- Site Size:** 25.5 Acres

SUMMARY

Pearsonstown Elementary School was opened in 1954 and had additions or renovations in 1958, 1964, and 1992. The facility has a student capacity of 772 students and had an enrollment of 827 for the 2018 / 2019 school year which represents an occupancy level of 107%. Since this facility is a year-round, choice school, enrollment is to be capped at 796 students each year through 2028 but this overcrowding situation will need to be addressed by developing a two classroom addition. The facility is due for a 20 year cycle renovation, asphalt repairs, roof replacement, HVAC system replacement, and replacement of some electrical and life safety systems, such as the fire alarm.



Current Capacity: 772 Students

Current Enrollment: 827 Students
107%

Projected Enrollment: 796 Students
103%

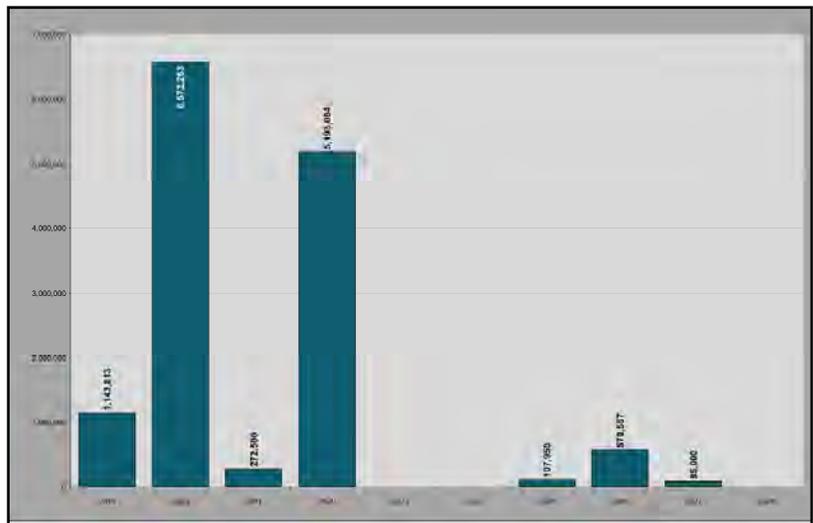
Square Feet per Student: 140.5 sf

Facility Condition Index: .42

New Construction: \$710,700

Current / Deferred Maintenance: \$13,247,563

Total Facility Needs: \$13,958,263



Durham Public Schools Capital Improvement Plan			Pearsontown Elementary		796	Summary Sheet	
Category/Description	Campus Program Total		\$ 13,958,263		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction							
- Addition	or			\$0	Currently at 107% Occupancy Level and will decrease to 103%		
- Addition	or	2,000	\$200.00	\$400,000	Two (2) Classroom Addition	2022	\$54,000
-	or			\$0			
Renovation							
- 20 Year Renovation	or	100,000	\$25.00	\$2,500,000	Entire Facility less Kitchen and Café	2022	\$337,500
- 20 Year Renovation	or			\$0	Renovate Front Office, Café, Kitchen Area (2018)	2038	\$0
- Theater Arts Renovation	or	\$60,000		\$60,000	A/V, Lights, Rigging	2022	\$8,100
Site							
- Grading for New Construction	or	\$115,000		\$115,000	Site Prep for Classroom Addition	2022	\$15,525
- Grading	or	\$5,000		\$5,000	Allowance: Repair Deep Hole / Culvert Next to Playground	2019	\$0
- Drainage / Erosion	or	\$10,000		\$10,000	Regrade for Drainage Issues at Playground	2020	\$460
- Landscaping / Grassing	or	\$5,000		\$5,000	Landscape Refresh	2022	\$675
- Irrigation	or			\$0			
- Athletic Field(s) / Playground(s)	or			\$0			
- Athletic / Playground Equipment	or			\$0			
- Parking Lot(s)	or			\$0			
- Driveway(s) / Turn Lanes(s)	or	\$100,000		\$100,000	Allowance: Repair Asphalt at Driveway	2019	\$0
- Sidewalks	or	\$5,000		\$5,000	Allowance: Repair Sidewalk at Several Places on Site	2019	\$0
- ADA	or	\$2,500		\$2,500	Playground ADA Access	2019	\$0
- Fencing	or			\$0			
- Site Lighting	or			\$0	Duke Power Owned System		
- Utilities	or			\$0			
-	or			\$0			
Building Envelope							
- Structural	or			\$0			
- Roof: Low Slope	or	\$976,526		\$976,526	Replace Original Bldg. & 1993 Addition (Completion two years after funding)	2020	\$43,944
- Roof: Low Slope	or			\$0			
- Roof: Metal	or			\$0			
- Exterior Walls	or	\$5,000		\$5,000	Pressure Wash Exterior	2020	\$225
- Exterior Doors	or			\$0			
- Storefronts / Window Walls	or			\$0			
- Windows	or			\$0			
-	or			\$0			
Building Finishes							
- Flooring: VCT / Vinyl	or			\$0	VCT Replaced in K, Front Office (2018)		
- Flooring: Hard Tile / Terrazzo	or			\$0			
- Flooring: Sports Flooring	or	6,000	\$12.00	\$72,000	Replace Gym Floor (Wood)	2020	\$3,240
- Ceiling: ACT	or			\$0			
- Ceiling: Other	or			\$0			
- Walls: Painting	or	108,471	\$1.50	\$162,707	Per 7-Year Cycle	2020	\$7,322
- Walls: Other	or	\$10,000		\$10,000	Gym Walls are Damaged from Roof Leaks	2020	\$450
- Casework	or			\$0			
- Interior Doors / Windows	or			\$0			
- ADA / Code Upgrades	or	\$15,000		\$15,000	Upgrade Miscellaneous Building Items (Including Gym Stage)	2020	\$675
- Asbestos Abatement	or	108,471	\$1.40	\$151,859	Pre 1989 CMU Walls	2020	\$6,834
- Other	or	300	\$175.00	\$52,500	Replace Wood Bleachers	2020	\$2,363
-	or			\$0			
Building Systems							
- Food Service	or	\$250,000		\$250,000	Replace Hood, Dish Washer, Cooler / Freezer	2021	\$22,500
- Food Service	or	\$85,000		\$85,000	Refresh Kitchen Equipment	2025	\$22,950
- Plumbing	or			\$0	Replace Water Heaters (2) 125 Gal (2016)	2036	\$0
- Fire Sprinkler	or			\$0			
- HVAC	or	108,471	\$4.00	\$433,884	Replace Chiller - Per 12 Year Cycle (2014)	2026	\$136,673
- HVAC	or	108,471	\$2.00	\$216,942	Replace Boiler (2) - Per 20 Year Cycle	2020	\$9,762
- HVAC	or	108,471	\$35.00	\$3,796,485	Replace AHUs, Convert from 2 pipe to 4 pipe	2020	\$170,842
- HVAC	or	108,471	\$3.00	\$325,413	Replace Controls - Per 20 Year Cycle	2020	\$14,644
- Electrical	or	104,471	\$1.50	\$156,707	Replace Balance of T12s to LED	2020	\$7,052
- Electrical	or	\$50,000		\$50,000	Replace Switchgear	2020	\$2,250
- Fire Alarm	or	108,471	\$2.50	\$271,178	Full System Replacement - Per 20 Year Cycle	2020	\$12,203
- Security: Cameras	or	\$62,500		\$62,500	Full System Replacement - Per 6 Year Cycle (Replaced 2018)	2027	\$22,500
- Security: Intrusion	or	\$6,931		\$6,931	Head End Replacement - Per 20 Year Cycle	2020	\$312
- Intercom	or			\$0	Full System Replacement - Per 20 Year Cycle (2017)	2037	\$0
- Access Controls	or	\$20,000		\$20,000	S2 Door Access	2020	\$900
-	or			\$0			
Technology							
- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle		
- UPS	or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks	or			\$0	Additional Drops		
- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle		
-	or			\$0			
Facility Improvements Sub Total				\$10,323,131			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$1,032,313		2019	\$0
Survey/Testing	1.5%			\$154,847		2022	\$20,904
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3%			\$309,694	Allowance - Refresh	2022	\$41,809
Land Purchase				\$0			
Contingency	10%			\$1,032,313		2022	\$139,362
Support Costs Subtotal				\$2,529,167			
Program Subtotal				\$12,852,298			
Program Escalation				\$1,105,965			\$1,105,965
Program Total				\$13,958,263			



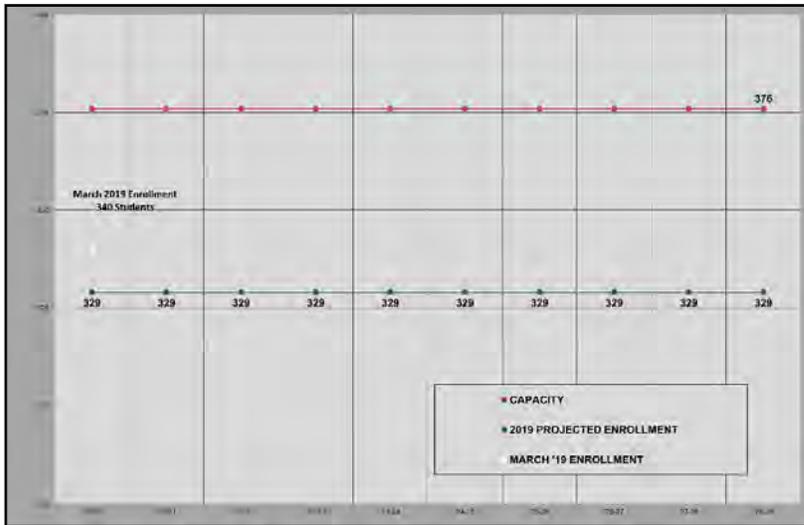
R.N. HARRIS ELEMENTARY

1520 COOPER STREET

- School #:** 367
- Building Size:** 70,343 Square Feet
- Grade Level:** PK-5
- Year Built:** 1968, '03, '13
- Site Size:** 21.3 Acres

SUMMARY

R.N. Harris Elementary is a magnet school that has a capacity of 376 students and is currently enrolled at the 90% occupancy level. Since the school is a magnet, enrollment can be managed with a cap limit and therefore potential expansion should not be needed. The FCI is in the good to fair range through 2024. It will transition to the poor range at 0.27 if needs associated with the 20 year cycle renovations, site related needs, and HVAC System replacement are not addressed.



Current Capacity: 376 Students

Current Enrollment: 340 Students
90%

Projected Enrollment: 329 Students
88%

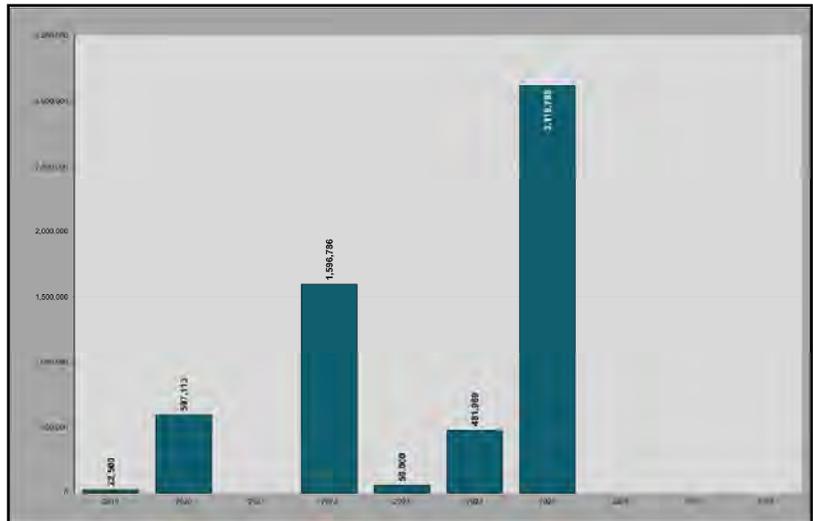
Square Feet per Student: 187.1 sf

Facility Condition Index: .27

New Construction: \$0

Current / Deferred Maintenance: \$5,874,166

Total Facility Needs: \$5,874,166



Durham Public Schools		R.N. Harris Elementary		School 387		Summary Sheet	
Capital Improvement Plan		Campus Program Total		\$ 5,874,166			
Category/Description	Lump Sum	Unit	Cost/Unit	Cost Estimate	Comments	Year Required	Escalation
I A Facility Improvements:							
New Construction					Currently at 90% Occupancy Level but will reduce to 88%		
- Addition		or		\$0	Remove Mobile Unit		
		or		\$0			
Renovation							
- 20 Year Renovation		or	37,226	\$25.00	\$930,650	2025	\$251,276
- 20 Year Renovation		or			\$0	2033	\$0
- 20 Year Renovation		or	4	\$50,000.00	\$200,000	2025	\$54,000
- Security Vestibule		or			\$0		
- Theater Arts Renovation	\$60,000	or			\$60,000	2025	\$16,200
					A/V, Lights, Rigging		
Site							
- Grading for New Construction		or			\$0		
- Drainage / Erosion	\$10,000	or			\$10,000	2019	\$0
- Landscaping / Grassing	\$5,000	or			\$5,000	2025	\$1,350
- Irrigation		or			\$0		
- Athletic Field(s) / Playground(s)	\$125,000	or			\$125,000	2020	\$5,625
- Athletic Field(s) / Playground(s)	\$20,000	or			\$20,000	2020	\$900
- Athletic / Playground Equipment		or			\$0		
- Parking Lots	\$10,000	or			\$10,000	2020	\$450
- Driveway(s) / Turn lane(s)		or	16,800	\$18.00	\$302,400	2020	\$13,608
- Driveway(s) / Turn lane(s)	\$75,000	or			\$75,000	2020	\$3,375
- Sidewalks		or			\$0		
- ADA	\$7,500	or			\$7,500	2020	\$338
- Fencing		or	500	\$18.00	\$9,000	2020	\$405
- Site Lighting	\$7,500	or			\$7,500	2019	\$0
- Utilities		or			\$0		
		or			\$0		
Building Envelope							
- Structural		or			\$0		
- Roof, Low Slope		or			\$0	2037	\$0
- Roof, Low Slope		or			\$0	2037	\$0
- Roof, Metal		or			\$0		
- Exterior Walls		or			\$0		
- Exterior Doors		or			\$0		
- Storefronts / Window Walls		or			\$0		
- Windows		or			\$0		
		or			\$0		
Building Finishes							
- Flooring: VGT / Vinyl		or			\$0		
- Flooring: Hard Tile / Terrazzo		or			\$0		
- Flooring: Sports Flooring		or			\$0		
- Ceiling: ACT		or			\$0		
- Ceiling: Other		or			\$0		
- Walls: Painting		or	70,343	\$1.50	\$105,515	2025	\$28,489
- Walls: Other		or			\$0		
- Casework		or			\$0		
- Interior Doors / Windows		or			\$0		
- ADA / Code Upgrades	\$10,000	or			\$10,000	2025	\$2,700
- Asbestos Abatement		or	70,343	\$1.40	\$98,480	2025	\$26,590
- Benches	\$2,500	or			\$2,500	2020	\$113
		or			\$0		
Building Systems							
- Food Service		or			\$0	2033	\$0
- Plumbing		or	69,544	\$4.00	\$278,176	2025	\$75,108
- Plumbing		or	2	\$10,000.00	\$20,000	2025	\$5,400
- Fire Sprinkler		or			\$0		
- HVAC	\$5,000	or			\$5,000	2019	\$0
- HVAC		or	70,343	\$4.00	\$281,372	2022	\$37,985
- HVAC		or	70,343	\$2.00	\$140,686	2022	\$18,993
- HVAC		or	70,343	\$14.00	\$984,802	2022	\$132,948
- HVAC		or	70,343		\$0	2036	\$0
- Electrical		or			\$0		
- Fire Alarm		or	70,343	\$2.50	\$175,858	2025	\$47,482
- Security: Cameras	\$40,000	or			\$40,000	2023	\$7,200
- Security: Intrusion		or	70,343		\$0	2033	\$0
- Intercom	\$10,000	or			\$10,000	2023	\$1,800
- Access Controls	\$20,000	or			\$20,000	2020	\$900
Technology							
- Route / Switch Equipment		or			\$0		
- UPS		or			\$0		
- Wireless Access Points		or			\$0		
- VOIP Phones System		or			\$0		
- Data Cabling / Racks		or			\$0		
- Classroom A/V		or			\$0		
		or			\$0		
Facility Improvements Sub Total					\$3,934,438		
II B Support Costs							
Prof/Pm/Support Fees	10%				\$393,444	2024	\$88,525
Survey/Testing	1.5%				\$59,017	2025	\$15,934
Storage and Moving					\$0		
City Fees/County					\$0		
FF&E	3%				\$118,033	2025	\$31,869
Land Purchase					\$0		
Contingency	10%				\$393,444	2025	\$106,230
Support Costs Subtotal					\$963,937		
Program Subtotal					\$4,898,376		
Program Escalation					\$975,790		\$975,790
Program Total					\$5,874,166		



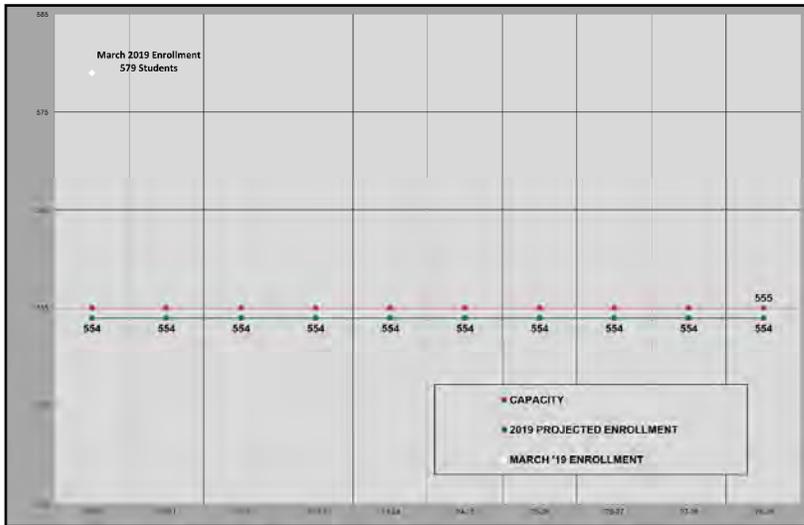
SANDY RIDGE ELEMENTARY

1417 OLD OXFORD HIGHWAY

- School #:** 369
- Building Size:** 98,638 Square Feet
- Grade Level:** PK-5
- Year Built:** 2011
- Site Size:** 25.0 Acres

SUMMARY

Sandy Ridge Elementary School is the newest school that DPS completed, opening in 2011 and was designed with a building capacity of 630 but the capacity was reduced to 555 students due K-3 legislation. Although the facility is over capacity currently, it is anticipated that the enrollment will decrease to 554 in 2020 and remain constant through 2028. Although less than ten years old, the facility will still require maintenance associated with painting, HVAC chiller replacement, and replacement of interior lights with LED fixtures.



Current Capacity: 555 Students

Current Enrollment: 579 Students
104%

Projected Enrollment: 554 Students
99%

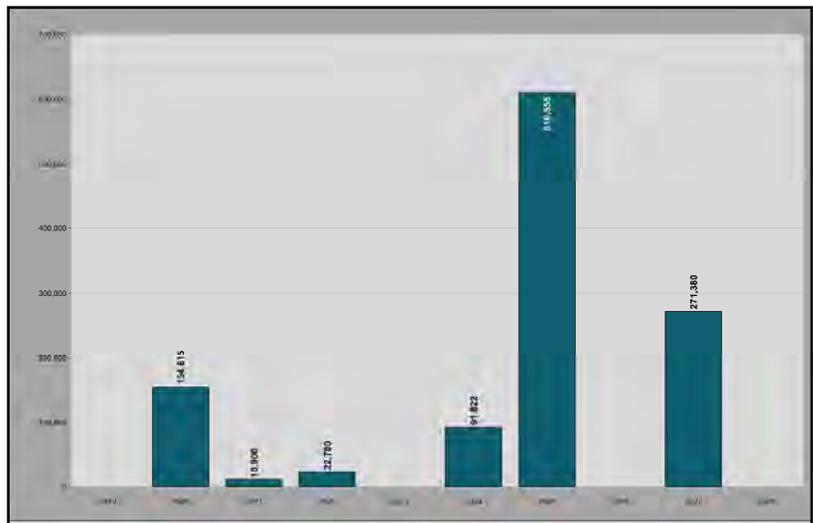
Square Feet per Student: 177.7 sf

Facility Condition Index: .04

New Construction: \$0

Current / Deferred Maintenance: \$1,161,972

Total Facility Needs: \$1,161,972



Durham Public Schools Capital Improvement Plan			Sandy Ridge Elementary		554	Summary Sheet		
Category/Description	Campus Program Total		\$ 1,161,972		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A Facility Improvements:								
New Construction								
- Addition		or		\$0	Currently at 104% Occupancy Level and will decrease to 100%			
-		or		\$0				
Renovation								
- 20 Year Renovation		or		\$0	Opened in 2011	2031	\$0	
- Theater Arts Renovation		or		\$0	A/V, Lights, Rigging	2031	\$0	
Site								
- Grading for New Construction		or		\$0				
- Drainage / Erosion		or		\$0				
- Utilities		or		\$0				
- Landscaping / Grassing		or		\$0	Landscape Refresh	2031	\$0	
- Irrigation		or		\$0				
- Athletic Field(s) / Playground(s)		or		\$0				
- Athletic / Playground Equipment		or		\$0				
- Parking Lot(s)	\$10,000	or		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2021	\$900	
- Driveway(s) / Turn lane(s)		or		\$0				
- Sidewalks		or		\$0				
- ADA		or		\$0				
- Fencing		or		\$0				
- Site Lighting		or		\$0	Duke Power Owned System			
- Utilities		or		\$0				
-		or		\$0				
Building Envelope								
- Structural		or		\$0				
- Roof, Low Slope		or		\$0		2031	\$0	
- Roof, Metal		or		\$0				
- Roof, Shingle		or		\$0				
- Exterior Walls		or		\$0				
- Exterior Doors		or		\$0				
- Storefronts / Window Walls		or		\$0				
- Windows		or		\$0				
-		or		\$0				
Building Finishes								
- Flooring, VCT / Vinyl		or		\$0				
- Flooring, Hard Tile / Terrazzo		or		\$0				
- Flooring, Sports Flooring		or		\$0				
- Ceiling, ACT		or		\$0				
- Ceiling, Other		or		\$0				
- Walls, Painting		or	98,638	\$1.50	\$147,957	Painting Per 7 Year Cycle	2020	\$6,658
- Walls, Other		or			\$0			
- Casework		or			\$0			
- Interior Doors / Windows		or			\$0			
- ADA / Code Upgrades		or			\$0			
- Asbestos Abatement		or			\$0			
-		or			\$0			
Building Systems								
- Food Service		or			\$0		2031	\$0
- Plumbing		or			\$0			
- Fire Sprinkler		or			\$0			
- HVAC		or	98,638	\$4.00	\$394,552	Replace Chillers (2) - Per 12 Year Cycle	2025	\$106,529
- HVAC		or	98,638		\$0	Replace Boilers - Per 20 Year Cycle	2031	\$0
- HVAC		or	98,638		\$0	Replace Indoor Air Units (4 Pipe System)	2031	\$0
- HVAC		or	98,638		\$0	Replace Controls - Per 20 Year Cycle	2031	\$0
- Electrical		or	94,638	\$1.50	\$141,957	Replace T8s to LED	2027	\$51,105
- Fire Alarm		or	98,638		\$0	Full System Replacement - Per 20 Year Cycle (2011)	2031	\$0
- Security, Cameras		or	27	\$1,300.00	\$35,100	Upgrade Existing "Older" I.P. Cameras & Server	2027	\$12,636
- Security, Intrusion		or			\$0	Head End Replacement - Per 20 Year Cycle (2011)	2026	\$0
- Intercom		or			\$0	Head End Replacement - Per 20 Year Cycle (2011)	2031	\$0
- Access Controls	\$20,000	or			\$20,000	S2 Door Access	2022	\$2,700
-		or			\$0			
Technology								
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle		
- UPS		or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or			\$0	Additional Drops		
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle		
-		or			\$0			
Facility Improvements Sub Total					\$749,566			
II B Support Costs								
Prof/Pm/Support Fees	10%				\$74,957		2024	\$16,865
Survey/Testing	1.5%				\$11,243		2025	\$3,036
Storage and Moving					\$0			
City Fees/County					\$0			
FF&E	3%				\$22,487	Allowance - Refresh	2027	\$8,095
Land Purchase					\$0			
Contingency	10%				\$74,957		2025	\$20,238
Support Costs Subtotal					\$183,644			
Program Subtotal					\$933,210			
Program Escalation					\$228,762			\$228,762
Program Total					\$1,161,972			



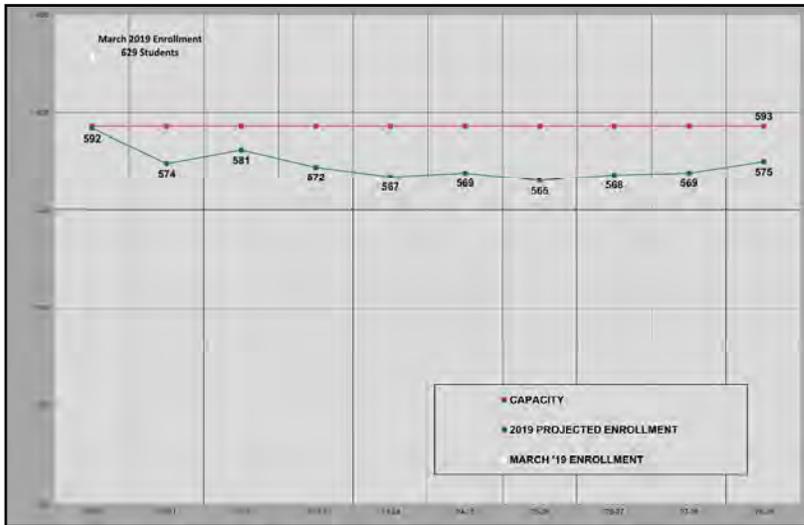
SOUTHWEST ELEMENTARY

2320 COOK ROAD

- School #:** 372
- Building Size:** 91,170 Square Feet
- Grade Level:** PK-5
- Year Built:** 1989, '91
- Site Size:** 21.9 Acres

SUMMARY

Southwest Elementary School has a student capacity of 585 students but an enrollment of 629, which exceeds capacity by 6%. A minimal amount of fluctuation is expected over the next ten years ending with a 2028 enrollment of 575, which is below the capacity level of the building. Once enrollment drops below capacity, it is suggested that the four (4) mobile units be removed from the campus to enhance facility security. The FCI is rated as good through 2025 when it will fall to poor and to maintain the good rating, the District should plan a 20 year cycle renovation of the 1981 and 1991 buildings, repair asphalt, replace kitchen equipment, replace HVAC system components, replace the fire alarm system, and upgrade interior lighting to LED fixtures.



Current Capacity: 593 Students

Current Enrollment: 629 Students
106%

Projected Enrollment: 575 Students
97%

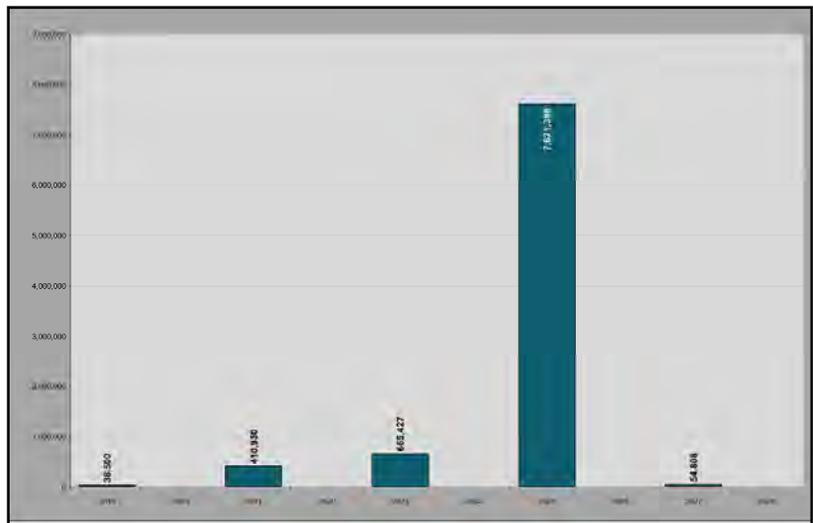
Square Feet per Student: 153.7 sf

Facility Condition Index: .25

New Construction: \$166,650

Current / Deferred Maintenance: \$8,624,414

Total Facility Needs: \$8,791,064





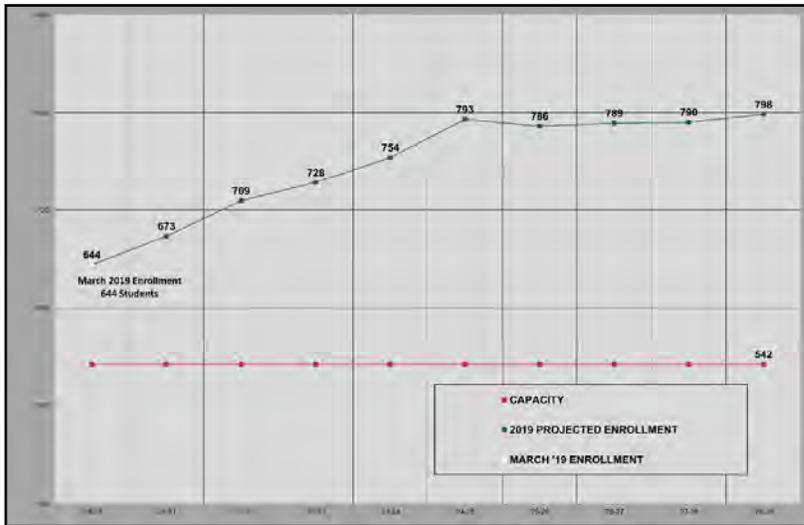
SPRING VALLEY ELEMENTARY

2051 NORTHERN DURHAM PARKWAY

- School #:** 376
- Building Size:** 79,921 Square Feet
- Grade Level:** PK-5
- Year Built:** 2008
- Site Size:** 35.8 Acres

SUMMARY

Opened in 2009, this is one of DPS' newest elementary schools and opened with a facility capacity of 638 but capacity was reduced to 542 due to the K-3 legislation. The facility is currently over capacity with 644 students in attendance. Over the next ten years, enrollment will only increase and during the 2028 school year, the school is projected to house 798 students therefore, either an addition or other relief measures should be considered. The FCI is good indicating minor typical maintenance over the next ten years.



Current Capacity: 542 Students

Current Enrollment: 644 Students
119%

Projected Enrollment: 798 Students
147%

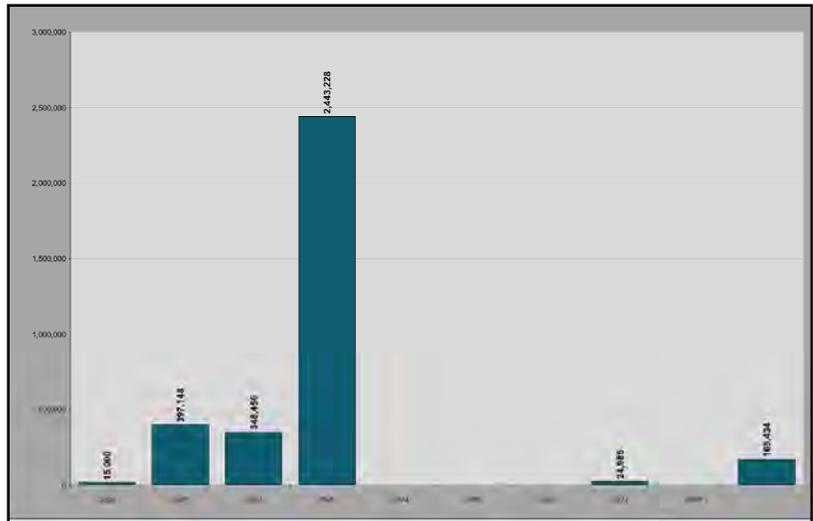
Square Feet per Student: 147.5 sf

Facility Condition Index: .14

New Construction: \$2,366,700

Current / Deferred Maintenance: \$1,030,550

Total Facility Needs: \$3,397,250



Durham Public Schools Capital Improvement Plan			Spring Valley Elementary		School 376	Summary Sheet		
Category/Description	Campus Program Total		\$ 3,397,250		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A	Facility Improvements:							
	New Construction							
- Addition		or			\$0	Currently at 119% Occupancy Level and will increase to 147%		
- Addition		or	8,000	\$200.00	\$1,600,000	Eight (8) Classroom Addition	2022 \$216,000	
-		or			\$0			
	Renovation							
- 20 Year Renovation		or	79,921		\$0	20 Year Renovation	2029 \$0	
- Theater Arts Renovation		or			\$0	A/V, Lights, Rigging	2029 \$0	
	Site							
- Grading for New Construction	\$115,000	or			\$115,000	Sitework for Addition	2022 \$15,525	
- Grading for New Construction		or	1,100	\$17.00	\$18,700	Add Retaining Wall for New Parking	2020 \$842	
- Drainage / Erosion		or			\$0			
- Landscaping / Grassing		or			\$0	Landscape Refresh	2029 \$0	
- Irrigation		or			\$0			
- Athletic Field(s) / Playground(s)		or			\$0			
- Athletic / Playground Equipment		or			\$0			
- Parking Lot(s)	\$10,000	or			\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2019 \$0	
- Parking Lot(s)		or	30	\$2,250.00	\$67,500	Additional Parking Needed	2022 \$9,113	
- Driveway(s) / Turn lane(s)		or			\$0			
- Sidewalks		or			\$0			
- ADA		or			\$0			
- Fencing		or			\$0			
- Site Lighting		or			\$0	Duke Energy Owned System		
- Utilities		or			\$0			
-		or			\$0			
	Building Envelope							
- Structural		or			\$0			
- Roof: Low Slope		or			\$0			
- Roof: Metal		or			\$0	Entire Roof New in 2009.	2029 \$0	
- Roof: Shingle		or			\$0			
- Exterior Walls		or			\$0			
- Exterior Doors		or			\$0			
- Storefronts / Window Walls		or			\$0			
- Windows		or			\$0			
-		or			\$0			
	Building Finishes							
- Flooring: VCT / Vinyl		or			\$0			
- Flooring: Hard Tile / Terrazzo		or			\$0			
- Flooring: Sports Flooring		or			\$0			
- Ceiling: ACT		or			\$0			
- Ceiling: Other		or			\$0			
- Walls: Painting		or	79,921	\$1.50	\$119,882	Per 7-Year Cycle	2020 \$5,395	
- Walls: Other	\$5,000	or			\$5,000	Operable Wall can be problematic (Maintenance)	2019 \$0	
- Casework		or			\$0			
- Interior Doors / Windows		or			\$0			
- ADA / Code Upgrades		or			\$0			
- Asbestos Abatement		or			\$0			
-		or			\$0			
	Building Systems							
- Food Service		or			\$0		2029 \$0	
- Plumbing		or			\$0	Replace Water Heater - Flat Coil	2029 \$0	
- Fire Sprinkler		or			\$0			
- HVAC		or	79,921	\$4.00	\$319,684	Replace Chiller (1) - Per 12 Year Cycle	2021 \$28,772	
- HVAC		or	79,921		\$0	Replace Boiler (2) - Per 20 Year Cycle	2029 \$0	
- HVAC		or	79,921		\$0	Replace AHU (3)	2029 \$0	
- HVAC		or	79,921		\$0	Replace Controls - Per 20 Year Cycle	2029 \$0	
- Electrical		or	79,921	\$1.50	\$119,882	Replace T8s to LED	2028 \$48,552	
- Fire Alarm		or	79,921		\$0	Full System Replacement - Per 20 Year Cycle	2029 \$0	
- Security: Cameras		or	19	\$1,000.00	\$19,000	Upgrade Existing "Older" I.P. Cameras and add 5 additional cameras	2026 \$5,985	
- Security: Intrusion		or			\$0	System New in 20089- Per 20 Year Cycle	2029 \$0	
- Intercom		or	79,921		\$0	Full System Replacement - Per 20 Year Cycle	2029 \$0	
- Access Controls	\$20,000	or			\$20,000	S2 Door Access (add at two add'l locations)	2022 \$2,700	
-		or			\$0			
	Technology							
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle		
- UPS		or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or			\$0	Additional Drops		
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle		
-		or			\$0			
	Facility Improvements Sub Total				\$2,414,647			
II B	Support Costs							
Prof/Pm/Support Fees	10%				\$241,465		2020 \$10,866	
Survey/Testing	1.5%				\$36,220		2022 \$4,890	
Storage and Moving					\$0			
City Fees/County					\$0			
FF&E	3%				\$72,439	Allowance - Refresh	2022 \$9,779	
Land Purchase					\$0			
Contingency	10%				\$241,465		2022 \$32,598	
	Support Costs Subtotal				\$591,589			
	Program Subtotal				\$3,006,236			
	Program Escalation				\$391,015			\$391,015
	Program Total				\$3,397,250			



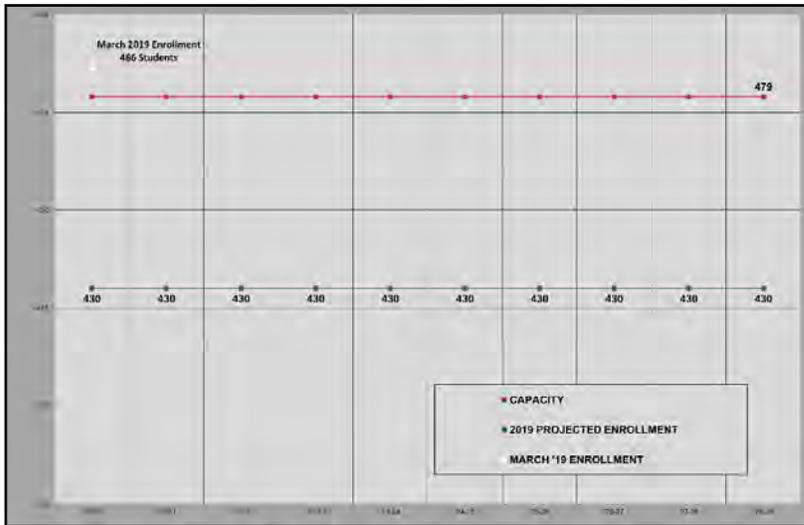
W.G. PEARSON ELEMENTARY

3501 FAYETTEVILLE STREET

- School #:** 388
- Building Size:** 82,474 Square Feet
- Grade Level:** PK-5
- Year Built:** 2006
- Site Size:** 40.5 Acres

SUMMARY

W. G. Pearson was opened in 2006 and will reach the 20 year milestone in a few years which is the sunset for life expectancy for many building systems. In 2014, the HVAC chillers were replaced but the balance of the HVAC systems will need attention soon as well as other facility wide items such as a 20 year cycle renovation and life safety systems such as the fire alarm. The facility has a current student capacity of 479 students but the enrollment is 486, which is just over 100% of capacity. However, enrollment is projected to reduce to 430 students in 2020 and remain level through 2028 school year.



Current Capacity: 479 Students

Current Enrollment: 486 Students
101%

Projected Enrollment: 430 Students
90%

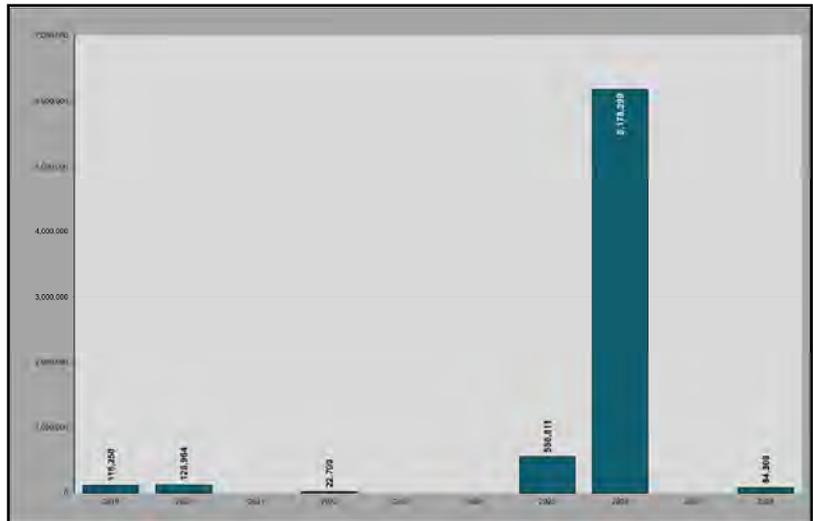
Square Feet per Student: 172.2 sf

Facility Condition Index: .28

New Construction: \$0

Current / Deferred Maintenance: \$7,089,424

Total Facility Needs: \$7,089,424



Durham Public Schools Capital Improvement Plan			W.G. Pearson Elementary		430	Summary Sheet	
Category/Description	Campus Program Total		\$ 7,089,424		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A	Facility Improvements:						
	New Construction						
- Addition		or			\$0	Currently at 101% Occupancy Level and will decrease to 90%	
-		or			\$0		
	Renovation						
- 20 Year Renovation		or	82,474	\$25.00	\$2,061,850	Opened 2006	2026 \$649,483
- Security Vestibule	\$70,750	or			\$70,750	Develop Passive Security at Front Office	2019 \$0
- Theater Arts Renovation	\$60,000	or			\$60,000	A/V, Lights, Rigging	2028 \$24,300
	Site						
- Grading for New Construction		or			\$0		
- Drainage / Erosion		or			\$0		
- Landscaping / Grassing	\$5,000	or			\$5,000	Landscape Refresh	2026 \$1,575
- Irrigation		or			\$0		
- Athletic Field(s) / Playground(s)	\$7,500	or			\$7,500	Allowance: Refresh Surface on (1) Playground	2019 \$0
- Athletic Field(s) / Playground(s)	\$5,000	or			\$5,000	Allowance: Erosion Issues at Basketball Court (Retaining Wall)	2019 \$0
- Athletic / Playground Equipment		or			\$0		
- Parking Lot(s)	\$10,000	or			\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2019 \$0
- Driveway(s) / Turn lane(s)	\$10,000	or			\$10,000	Allowance: Drive Going into Staff Parking has some Settlement	2019 \$0
- Driveway(s) / Turn lane(s)	\$10,000	or			\$10,000	Allowance: C&G Pulling away from Pavement at Bus Drive	2019 \$0
- Sidewalks	\$5,000	or			\$5,000	Allowance: Cracked / Broken Sidewalk at service area to parking lot (Survey)	2019 \$0
- ADA		or			\$0		
- Fencing		or			\$0		
- Site Lighting		or			\$0	Duke Power Owned System	
- Utilities		or			\$0		
-		or			\$0		
	Building Envelope						
- Structural		or			\$0		
- Roof: Low Slope		or			\$0	Replace Main Building, Gym, and Elevator Roofs	2030 \$0
- Roof: Metal		or			\$0	Replace Canopy Roofs	2030 \$0
- Roof: Shingle		or			\$0		
- Exterior Walls		or			\$0		
- Exterior Doors		or			\$0		
- Storefronts / Window Walls		or			\$0		
- Windows		or			\$0		
-		or			\$0		
	Building Finishes						
- Flooring: VCT / Vinyl		or			\$0		
- Flooring: Hard Tile / Terrazzo		or			\$0		
- Flooring: Sports Flooring		or			\$0		
- Ceiling: ACT		or			\$0		
- Ceiling: Other		or			\$0		
- Walls: Painting		or	82,274	\$1.50	\$123,411	Per 7-Year Cycle	2020 \$5,553
- Walls: Other		or			\$0		
- Casework		or			\$0		
- Interior Doors / Windows		or			\$0		
- ADA / Code Upgrades		or			\$0		
- Asbestos Abatement		or			\$0		
-		or			\$0		
	Building Systems						
- Food Service		or			\$0	Replace Hood & Cooler / Freezer	2030 \$0
- Food Service Equipment		or			\$0	Replace Kitchen Equipment	2030 \$0
- Plumbing		or	1	\$30,000.00	\$30,000	Replace Water Heater (1) 250 Gal	2026 \$9,450
- Fire Sprinkler		or			\$0		
- HVAC		or	82,274		\$0	Replace Chiller - Per 12 Year Cycle (2014)	2026 \$0
- HVAC		or	82,274	\$2.00	\$164,548	Replace Boilers (2) - Per 20 Year Cycle	2026 \$51,833
- HVAC		or	82,274	\$14.00	\$1,151,836	Replace Indoor Air Units	2026 \$362,828
- HVAC		or	82,274	\$3.00	\$246,822	Replace Controls - Per 20 Year Cycle	2026 \$77,749
- Electrical		or	78,000	\$1.50	\$117,000	Replace Balance of T8s to LED	2026 \$36,855
- Electrical		or			\$0		
- Fire Alarm		or	82,274	\$2.50	\$205,685	Full System Replacement - Per 20 Year Cycle (2006)	2026 \$64,791
- Security: Cameras	\$10,000	or			\$10,000	Full System Replacement - Per 6 Year Cycle (Replaced 2018)	2026 \$3,150
- Security: Intrusion		or			\$0	Head End Replacement - Per 20 Year Cycle (2013)	2033 \$0
- Intercom		or	82,274	\$0.85	\$69,933	Head End Replacement - Per 20 Year Cycle (2006)	2026 \$22,029
- Access Controls	\$20,000	or			\$20,000	S2 Door Access	2022 \$2,700
	Technology						
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle	
- UPS		or			\$0	Replace - Per 5 Year Cycle	
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle	
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle	
- Data Cabling / Racks		or			\$0	Additional Drops	
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle	
-		or			\$0		
	Facility Improvements Sub Total				\$4,384,335		
II B	Support Costs						
Prof/Pm/Support Fees	10%				\$438,433		2025 \$118,377
Survey/Testing	1.5%				\$65,765		2026 \$20,716
Storage and Moving					\$0		
City Fees/County					\$0		
FF&E	3%				\$131,530	Allowance - Refresh	2026 \$41,432
Land Purchase					\$0		
Contingency	10%				\$438,433		2026 \$138,107
	Support Costs Subtotal				\$1,074,162		
	Program Subtotal				\$5,458,497		
	Program Escalation				\$1,630,927		\$1,630,927
	Program Total				\$7,089,424		



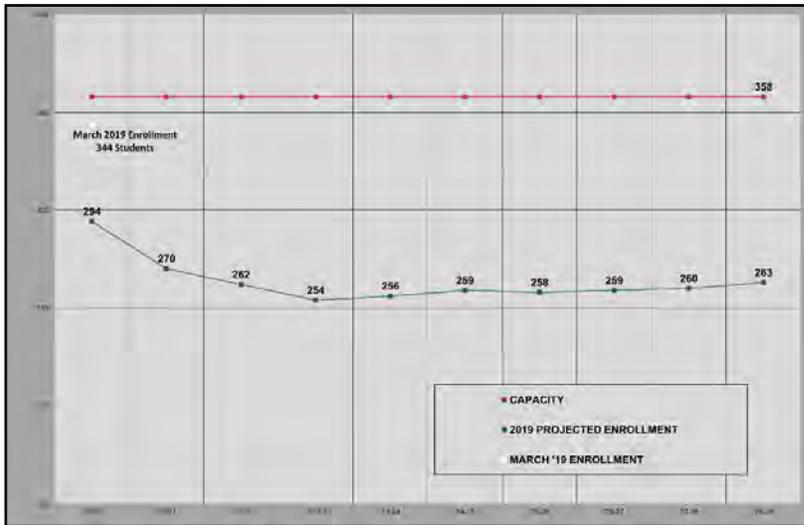
Y.E. SMITH ELEMENTARY

2410 EAST MAIN STREET

- School #:** 400
- Building Size:** 46,311 Square Feet
- Grade Level:** PK-5
- Year Built:** 1967
- Site Size:** 5.2 Acres

SUMMARY

YE Smith Elementary School received a 10,000 square foot addition in 2014 that allowed DPS to remove the four mobile units that served the school for years. The addition increased the student capacity from 290 to 358 and the current enrollment is 344, which equates to as 96% occupancy level. The trend over the next ten years is for the enrollment to decrease to 263 in 2028, equaling 73% occupancy. Over the last ten years, the facility received a 20 year cycle renovation, a roof replacement, new kitchen hood, cooler / freezer, and some HVAC system replacement but therefore the FCI is rated as good. However, the District should plan on addressing maintenance associated with the remaining HVAC components, water heater replacement, and replacement of existing light fixtures with LED fixtures.



Current Capacity: 358 Students

Current Enrollment: 344 Students
96%

Projected Enrollment: 263 Students
73%

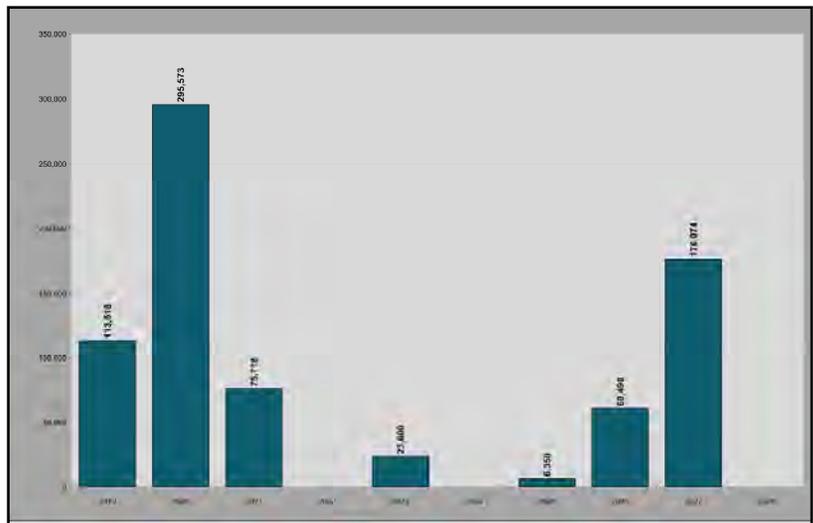
Square Feet per Student: 129.4 sf

Facility Condition Index: .04

New Construction: \$0

Current / Deferred Maintenance: \$751,323

Total Facility Needs: \$751,323



Durham Public Schools Capital Improvement Plan			Y.E. Smith Elementary		309	Summary Sheet		
Category/Description	Campus Program Total		\$ 751,323		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A Facility Improvements:								
New Construction					Currently at 96% Occupancy Level and will decrease to 73%			
- Addition		or		\$0				
-		or		\$0				
Renovation								
- 20 Year Renovation		or	46,311	\$0	20 Year Renovation (2014)	2034	\$0	
- Theater Arts Renovation	\$60,000	or		\$60,000	AV, Lights, Rigging	2027	\$21,600	
Site								
- Grading for New Construction		or		\$0				
- Drainage / Erosion		or		\$0				
- Drainage / Erosion	\$25,000	or		\$25,000	Drainage Issues At Perimeter of Facility and Athletic Fields	2019	\$0	
- Landscaping / Grassing	\$5,000	or		\$5,000	Landscape Refresh	2025	\$1,350	
- Irrigation		or		\$0				
- Athletic Field(s) / Playground(s)		or		\$0	PG01 & PG02 Equipment has been replaced in 2013	2033	\$0	
- Athletic / Playground Equipment		or		\$0	Playground Equipment and Improvements (2017)	2037	\$0	
- Parking Lot(s)	\$10,000	or		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2019	\$0	
- Driveway(s) / Turn lane(s)		or		\$0				
- Sidewalks		or		\$0				
- ADA		or		\$0				
- Fencing		or		\$0				
- Site Lighting		or		\$0	Duke Power Owned System			
- Utilities		or		\$0				
-		or		\$0				
Building Envelope								
- Structural		or		\$0				
- Roof, Low Slope		or		\$0	Entire Roof Replaced in 2011	2031	\$0	
- Roof, Metal		or		\$0				
- Roof, Shingle		or		\$0				
- Exterior Walls	\$25,000	or		\$25,000	Allowance: Soffit Repair	2019	\$0	
- Exterior Doors		or		\$0				
- Storefronts / Window Walls		or		\$0				
- Windows		or		\$0				
-		or		\$0				
Building Finishes								
- Flooring, VCT / Vinyl		or		\$0				
- Flooring, Hard Tile / Terrazzo		or		\$0				
- Flooring, Sports Flooring		or		\$0				
- Ceiling, ACT		or		\$0				
- Ceiling, Other		or		\$0				
- Walls, Painting		or	46,311	\$ 1.50	\$69,467	Per 7-Year Cycle	2021	\$6,252
- Walls, Other		or		\$0				
- Casework		or		\$0				
- Interior Doors / Windows		or		\$0				
- ADA / Code Upgrades		or		\$0				
- Asbestos Abatement		or	46,311	\$0	Pre 1989 CMU Walls	2030	\$0	
-		or		\$0				
Building Systems								
- Food Service		or		\$0	Replaced Cooler / Freezer (2013)			
- Food Service		or		\$0	Hood Replacement (2015)			
- Plumbing		or	2	\$10,000.00	\$20,000	Water Heaters (2) 125 Gal	2023	\$3,600
- Fire Sprinkler		or		\$0				
- HVAC		or	46,311	\$1.00	\$46,311	Replace Filter Grills	2020	\$2,084
- HVAC		or	46,311	\$3.00	\$138,933	Replace Controls - Per 20 Year Cycle	2020	\$6,252
- HVAC		or	46,311	\$0	\$0	Replace DX Units (2008)	2028	\$0
- Electrical		or	46,311	\$1.50	\$69,467	Replace T8s to LED	2027	\$25,008
- Fire Alarm		or	46,311	\$0	\$0	Full System Replacement - Per 20 Year Cycle (2014)	2034	\$0
- Security: Cameras		or	46	\$1,000.00	\$46,000	Upgrade Existing "Older" I.P. Cameras	2026	\$14,490
- Security: Intrusion		or		\$0	\$0	Head End Replacement - Per 20 Year Cycle (2013)	2033	\$0
- Intercom		or		\$0	\$0	Full System Replacement - Per 20 Year Cycle (2014)	2034	\$0
- Access Controls	\$20,000	or		\$20,000	\$20,000	S2 Door Access	2020	\$900
Technology								
- Route / Switch Equipment		or		\$0	\$0	Replace - Per 5 Year Cycle		
- UPS		or		\$0	\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or		\$0	\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or		\$0	\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or		\$0	\$0	Additional Drops		
- Classroom A/V		or		\$0	\$0	Replace - Per 5 Year Cycle		
-		or		\$0	\$0			
Facility Improvements Sub Total					\$535,177			
II B Support Costs								
Prof/Pm/Support Fees	10%			\$53,518		2019	\$0	
Survey/Testing	1.5%			\$8,028		2020	\$361	
Storage and Moving				\$0				
City Fees/County				\$0				
FF&E	3%			\$16,055	Allowance - Refresh	2020	\$722	
Land Purchase				\$0				
Contingency	10%			\$53,518		2020	\$2,408	
Support Costs Subtotal					\$131,118			
Program Subtotal					\$666,295			
Program Escalation					\$85,028		\$85,028	
Program Total					\$751,323			



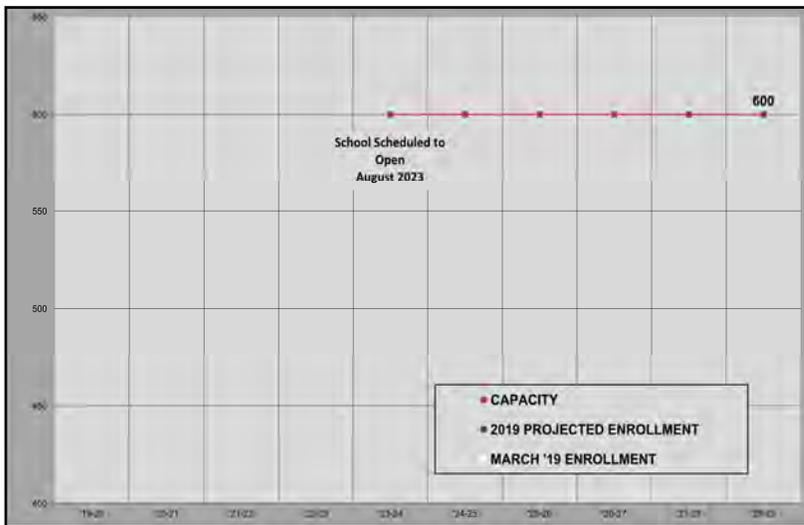
NEW ELEMENTARY SCHOOL "C"

906 SCOTT KING ROAD

- School #:** TBD
- Building Size:** 90,000 Square Feet
- Grade Level:** K-5
- Year Built:** 2023
- Site Size:** 46.3 Acres

SUMMARY

New Elementary School C is to be located on a previously acquired site in southern Durham and some conceptual design has been completed. This facility will help reduce overcrowding in the south west section of DPS. The facility needs to come online in 2022 but will take approximately 33 to 36 months after funding is in place and design begins.



Current Capacity: 600 Students

Current Enrollment: TBD Students
TBD%

Projected Enrollment: TBD Students
TBD%

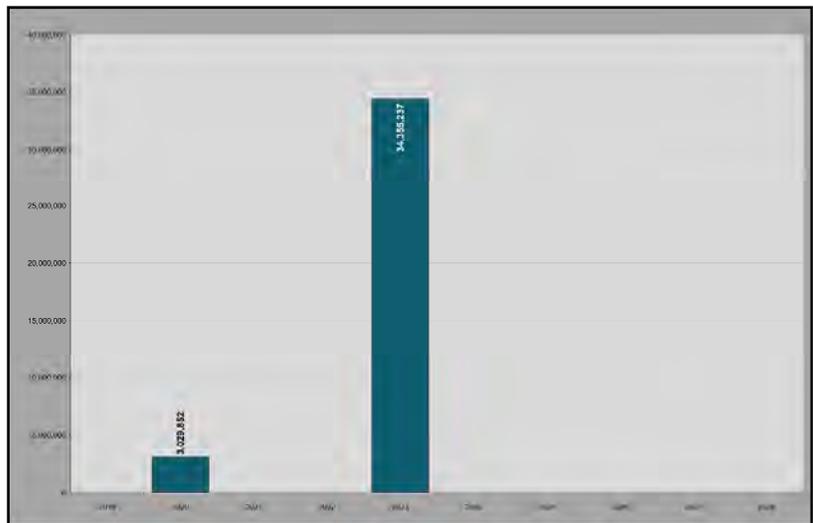
Square Feet per Student: 150 sf
(At 100% Capacity)

Facility Condition Index: N/A

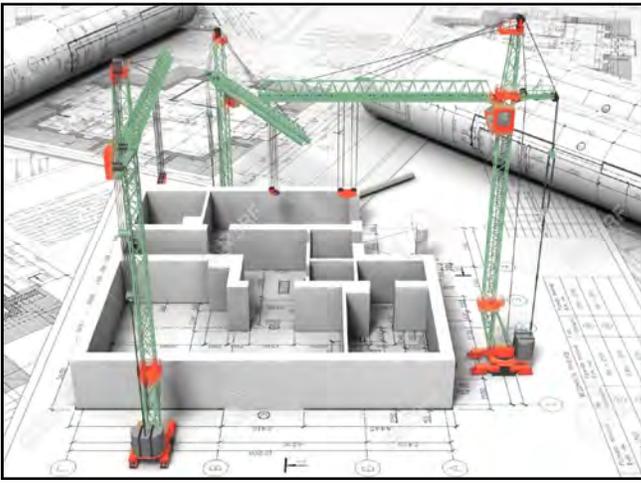
New Construction: \$37,385,089

Current / Deferred Maintenance: \$0

Total Facility Needs: \$37,385,089



Durham Public Schools Capital Improvement Plan			Scott King Road Elementary (School C)		TBD	Summary Sheet	
Category/Description	Campus Program Total		\$ 37,385,089		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A	Facility Improvements:						
	New Construction						
	- New Facility	or 90,000	\$200	\$18,000,000	600 Core Capacity / 600 Initial Capacity	2023	\$3,240,000
	-	or		\$0			
	Renovation						
	-	or		\$0			
	Site						
	- Grading for New Construction	or 18	\$250,000	\$4,500,000		2023	\$810,000
	- Drainage / Erosion	or		\$0			
	- Landscaping / Grassing	or \$75,000		\$75,000		2023	\$13,500
	- Irrigation	or \$25,000		\$25,000		2023	\$4,500
	- Athletic Field(s) / Playground(s)	or \$50,000		\$50,000	Playground Surface	2023	\$9,000
	- Athletic / Playground Equipment	or \$125,000		\$125,000		2023	\$22,500
	- Parking Lot(s)	or		\$0		2023	\$0
	- Driveway(s) / Turn lane(s)	or \$600,000		\$600,000		2023	\$108,000
	- Sidewalks	or		\$0			
	- ADA	or		\$0			
	- Fencing	or		\$0			
	- Site Lighting	or		\$0			
	- Utilities	or \$250,000		\$250,000	New Offsite Utilities	2023	\$45,000
	-	or		\$0			
	Building Envelope						
	- Structural	or		\$0			
	- Roof: Low Slope	or		\$0			
	- Roof: Metal	or		\$0			
	- Roof: Shingle	or		\$0			
	- Exterior Walls	or		\$0			
	- Exterior Doors	or		\$0			
	- Storefronts / Window Walls	or		\$0			
	- Windows	or		\$0			
	-	or		\$0			
	Building Finishes						
	- Flooring: VCT / Vinyl	or		\$0			
	- Flooring: Hard Tile / Terrazzo	or		\$0			
	- Flooring: Sports Flooring	or		\$0			
	- Ceiling: ACT	or		\$0			
	- Ceiling: Other	or		\$0			
	- Walls: Painting	or		\$0			
	- Walls: Other	or		\$0			
	- Casework	or		\$0			
	- Interior Doors / Windows	or		\$0			
	- ADA / Code Upgrades	or		\$0			
	- Asbestos Abatement	or		\$0			
	-	or		\$0			
	Building Systems						
	- Food Service	or		\$0			
	- Plumbing	or		\$0			
	- Fire Sprinkler	or		\$0			
	- HVAC	or		\$0			
	- Electrical	or		\$0			
	- Fire Alarm	or		\$0			
	- Security: Cameras	or \$60,000		\$60,000		2023	\$10,800
	- Security: Intrusion	or		\$0			
	- Intercom	or		\$0			
	- Access Controls	or \$50,000		\$50,000		2023	\$9,000
	-	or		\$0			
	Technology						
	- Route / Switch Equipment	or 95,000	\$0.65	\$61,750	Replace per 5 Year Cycle	2023	\$11,115
	- UPS	or 95,000	\$0.25	\$23,750	Replace per 5 Year Cycle	2023	\$4,275
	- Wireless Access Points	or 95,000	\$0.65	\$61,750	Replace per 5 Year Cycle	2023	\$11,115
	- VOIP Phones System	or 95,000	\$0.65	\$61,750	Replace per 10 Year Cycle	2023	\$11,115
	- Data Cabling / Racks	or 95,000	\$1.50	\$142,500	CAT 6	2023	\$25,650
	- Classroom A/V	or 30	\$2,500.00	\$75,000	All Classrooms, Related Arts, and Support Areas	2023	\$13,500
	-	or		\$0			
	Facility Improvements Sub Total			\$24,161,500			
II B	Support Costs						
	Prof/Pm/Support Fees	12%		\$2,899,380		2020	\$130,472
	Survey/Testing	1.50%		\$362,423		2023	\$65,236
	Storage and Moving			\$0			
	City Fees/County			\$0			
	FF&E	9%		\$2,174,535		2023	\$391,416
	Land Purchase			\$0	Property Land Banked		
	Contingency	10%		\$2,416,150		2023	\$434,907
	Support Costs Subtotal			\$7,852,488			
	Program Subtotal			\$32,013,988			
	Program Escalation			\$5,371,101			\$5,371,101
	Program Total			\$37,385,089			



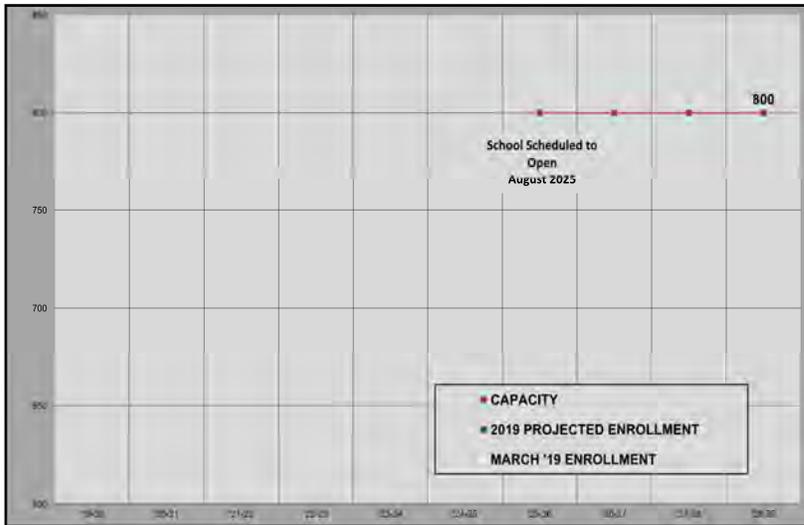
NEW ELEMENTARY SCHOOL

TBD

- School #:** TBD
- Building Size:** 120,000 Square Feet
- Grade Level:** K-5
- Year Built:** 2025
- Site Size:** 33.2 Acres

SUMMARY

The District needs to consider all available land currently owned by DPS as a potential site for a replacement / redistricting plan.



Current Capacity: 800 Students

Current Enrollment: TBD Students
TBD%

Projected Enrollment: TBD Students
TBD%

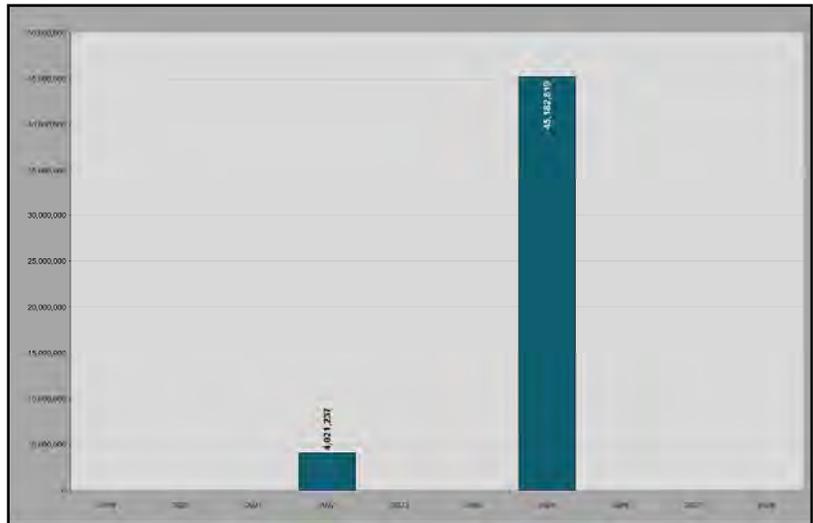
Square Feet per Student: 150 sf
(At 100% Capacity)

Facility Condition Index: N/A

New Construction: \$49,204,055

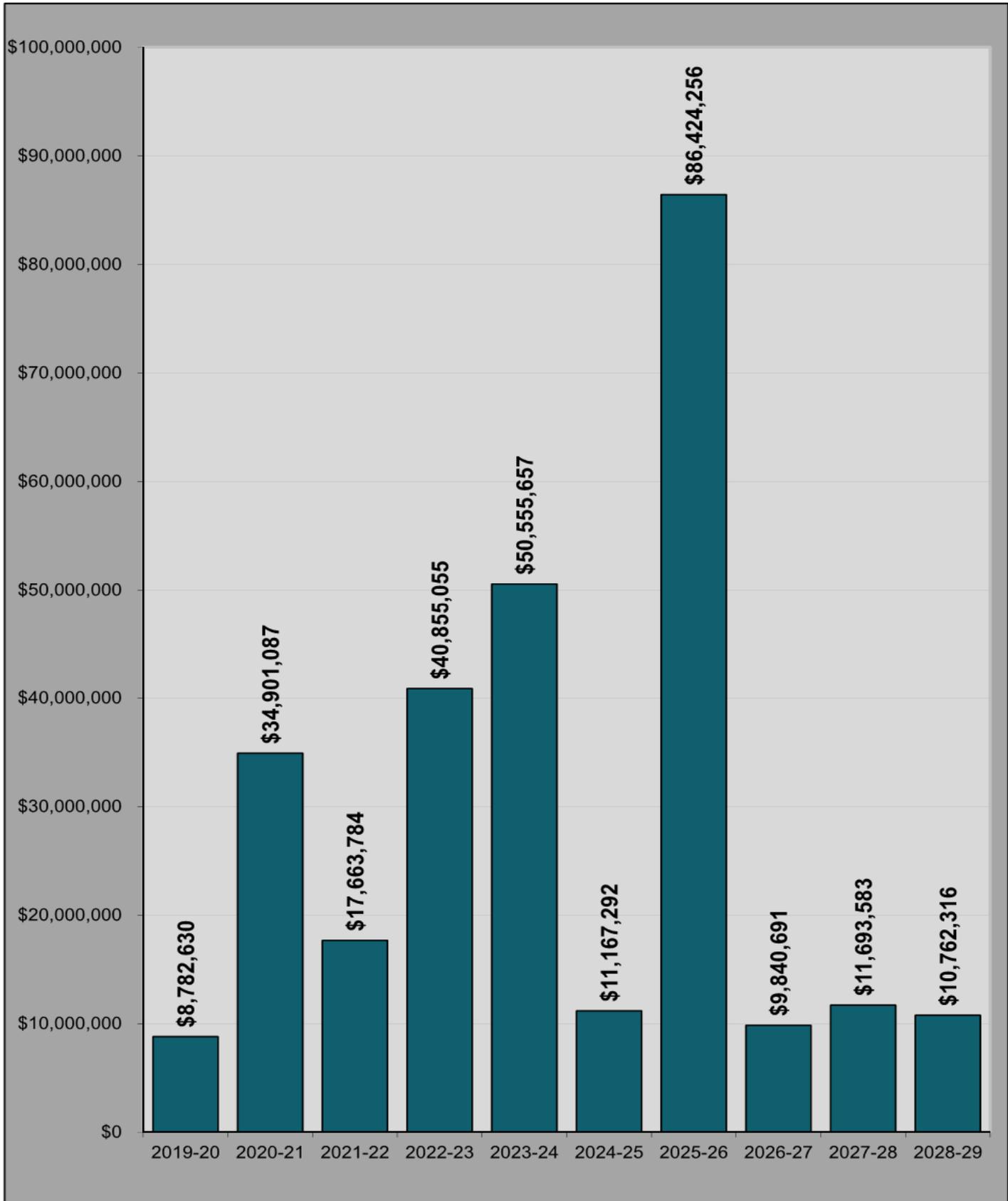
Current / Deferred Maintenance: \$0

Total Facility Needs: \$49,204,055



Durham Public Schools Capital Improvement Plan			Elementary "F" (Option Bas		TBD	Summary Sheet		
Category/Description	Campus Program Total		\$ 49,204,055		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A	Facility Improvements:							
	New Construction							
	- New Facility	or	120,000	\$200.00	\$24,000,000	800 Core Capacity / 800 Initial Capacity	2025	\$6,480,000
	- Canopies	or			\$0			
	-	or			\$0			
	Renovation							
	-	or			\$0			
	-	or			\$0			
	Site							
	- Grading for New Construction	or	20	\$200,000.00	\$4,000,000		2025	\$1,080,000
	- Drainage / Erosion	or			\$0			
	- Landscaping / Grassing	or			\$75,000		2025	\$20,250
	- Irrigation	or			\$25,000		2025	\$6,750
	- Athletic Field(s) / Playground(s)	or			\$75,000		2025	\$20,250
	- Athletic / Playground Equipment	or			\$75,000		2025	\$20,250
	- Parking Lot(s)	or			\$0			
	- Drivewa(s) / Turnlane(s)	or			\$500,000		2025	\$135,000
	- Sidewalks	or			\$0			
	- ADA	or			\$0			
	- Fencing	or			\$0			
	- Site Lighting	or			\$0			
	- Utilities	or			\$250,000	New Offsite Utilities	2025	\$67,500
	-	or			\$0			
	Building Envelope							
	- Structural	or			\$0			
	- Roof: Low Slope	or			\$0			
	- Roof: Metal	or			\$0			
	- Roof: Shingle	or			\$0			
	- Exterior Walls	or			\$0			
	- Exterior Doors	or			\$0			
	- Storefronts / Window Walls	or			\$0			
	- Windows	or			\$0			
	-	or			\$0			
	Building Finishes							
	- Flooring: VCT / Vinyl	or			\$0			
	- Flooring: Hard Tile / Terrazzo	or			\$0			
	- Flooring: Sports Flooring	or			\$0			
	- Ceiling: ACT	or			\$0			
	- Ceiling: Other	or			\$0			
	- Walls: Painting	or			\$0			
	- Walls: Other	or			\$0			
	- Casework	or			\$0			
	- Interior Doors / Windows	or			\$0			
	- ADA / Code Upgrades	or			\$0			
	- Asbestos Abatement	or			\$0			
	-	or			\$0			
	Building Systems							
	- Food Service	or			\$0			
	- Plumbing	or			\$0			
	- Fire Sprinkler	or			\$0			
	- HVAC	or			\$0			
	- Electrical	or			\$0			
	- Fire Alarm	or			\$0			
	- Security: Cameras	or			\$60,000	Full System Replacement - Per 6-Year Cycle	2025	\$16,200
	- Security: Intrusion	or			\$0			
	- Intercom	or			\$0			
	- Access Controls	or			\$50,000		2025	\$13,500
	-	or			\$0			
	Technology							
	- Route / Switch Equipment	or	85,000	\$0.65	\$55,250	Replace per 5 Year Cycle	2025	\$14,918
	- UPS	or	85,000	\$0.25	\$21,250	Replace per 5 Year Cycle	2025	\$5,738
	- Wireless Access Points	or	85,000	\$0.65	\$55,250	Replace per 5 Year Cycle	2025	\$14,918
	- VOIP Phones System	or	85,000	\$0.65	\$55,250	Replace per 10 Year Cycle	2025	\$14,918
	- Data Cabling / Racks	or	85,000	\$1.50	\$127,500	CAT 6	2025	\$34,425
	- Classroom A/V	or	40	\$2,500.00	\$100,000	All Classrooms, Related Arts, and Support Areas	2025	\$27,000
	-	or			\$0			
	Facility Improvements Sub Total					\$29,524,500		
	II B Support Costs							
	Prof/Pm/Support Fees		12%		\$3,542,940		2022	\$478,297
	Survey/Testing		1.50%		\$442,868		2025	\$119,574
	Storage and Moving				\$0			
	City Fees/County				\$0			
	FF&E		9%		\$2,657,205		2025	\$717,445
	Land Purchase				\$0	Site Land Banked		
	Contingency		10%		\$2,952,450		2025	\$797,162
	Support Costs Subtotal					\$9,595,463		
	Program Subtotal					\$39,119,963		
	Program Escalation					\$10,084,093		\$10,084,093
	Program Total					\$49,204,055		

ELEMENTARY SCHOOL CONSTRUCTION COST



\$282,646,349

MIDDLE SCHOOL SUMMARY SHEETS



DURHAM
PUBLIC SCHOOLS



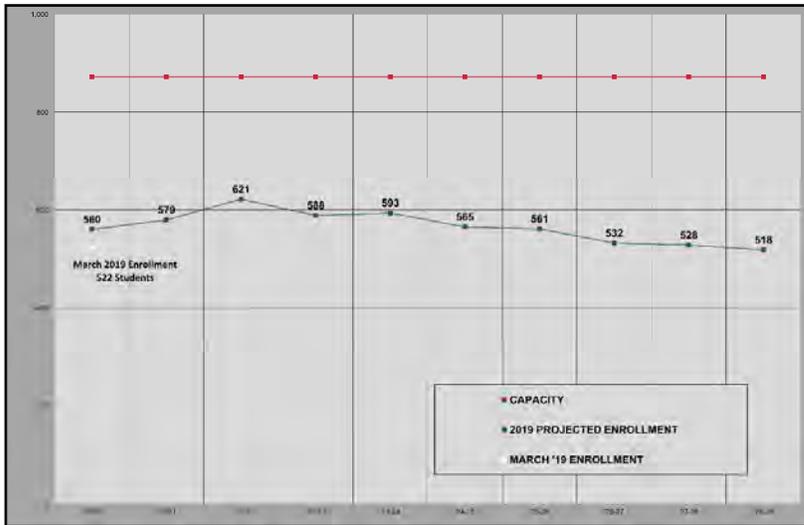
BROGDEN MIDDLE

1001 LEON STREET

- School #:** 306
- Building Size:** 156,380 Square Feet
- Grade Level:** 6-8
- Year Built:** 1959, '76, '00
- Site Size:** 29.3 Acres

SUMMARY

Brogden Middle School was built in 1959 and had subsequent additions / renovations in 1976 and 2000. The current student capacity is 872 students and has an enrollment of 522. It is projected that the enrollment will increase to 621 in 2021 and then fall to 518 in 2028. It currently has a good FCI factor of 0.03 but due to the need for a 20 year cycle renovation, roof replacement, and HVAC System replacement, the FCI will increase to the critical level by 2021.



Current Capacity: 872 Students

Current Enrollment: 522 Students
60%

Projected Enrollment: 518 Students
59%

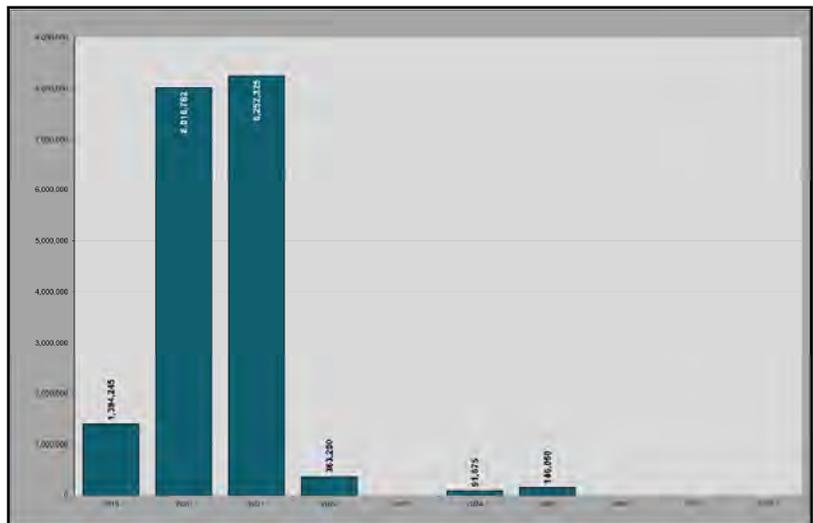
Square Feet per Student: 179.3 sf

Facility Condition Index: .38

New Construction: \$441,600

Current / Deferred Maintenance: \$17,882,857

Total Facility Needs: \$18,264,457



Durham Public Schools Capital Improvement Plan		Brogden Middle		515	Summary Sheet		
Category/Description	Campus Program Total		\$ 18,264,457		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Unit Cost Estimate			
I A	Facility Improvements:						
	New Construction						
- Addition	or	2,000	\$150.00	\$300,000	Currently at 60% Occupancy Level and will decrease to 59% New Concession Stand and Storage for Athletic Fields	2022	\$40,500
-				\$0			
	Renovation						
- 20 Year Renovation	or			\$0	Restrooms (2014)	2034	\$0
- 20 Year Renovation	or	135,000	\$25.00	\$3,375,000	1976 Building - 20 Year Cycle Renovation	2021	\$303,750
- 20 Year Renovation	or	17,000	\$25.00	\$425,000	1959 Building - 20 Year Cycle Renovation	2021	\$38,250
- 20 Year Renovation	or	4,000		\$0	Gym Renovations (2017)	2037	\$0
- Security Vestibule	or			\$0	Develop Passive Security at Front Office (2019)		
- Theater Arts Renovation	or	\$300,000		\$300,000	A/V, Lights, Rigging	2021	\$27,000
	Site						
- Grading for New Construction	or	\$20,000		\$20,000	Site Prep for Concession Stand	2022	\$2,700
- Drainage / Erosion	or	\$3,500		\$3,500	Investigate Corrective Measures for Drainage Issues at Courtyard	2019	\$0
- Landscaping / Grassing	or	\$5,000		\$5,000	Landscape Refresh	2021	\$450
- Irrigation	or		3	\$25,000.00	Irrigate Athletic Fields	2021	\$6,750
- Athletic Field(s) / Playground(s)	or		2	\$15,000.00	Replacement of Baseball and Softball Dugouts	2025	\$8,100
- Athletic Field(s) / Playground(s)	or	\$75,000		\$75,000	Resurface Track (2014)	2024	\$16,875
- Athletic Field(s) / Playground(s)	or		3	\$17,500.00	Regrade Football, Baseball & Softball	2021	\$4,725
- Athletic Field(s) / Playground(s)	or		800	\$220.00	Replace and add Football Field Bleachers	2021	\$15,840
- Parking Lot(s)	or			\$0	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2030	\$0
- Parking Lot(s)	or	\$75,000		\$75,000	Allowance: Resurface Drive / Parking adj to Building	2021	\$6,750
- Driveway(s) / Turn Lane(s)	or	\$75,000		\$75,000	Allowance: Resurface Drive / Parking at Back of Site	2021	\$6,750
- Sidewalks	or			\$0			
- ADA	or			\$0			
- Fencing	or			\$0			
- Site Lighting	or			\$0	Duke Energy Owned System		
- Site Lighting	or	\$15,000		\$15,000	Add Lighting at Front Parking Lot	2019	\$0
-	or			\$0			
	Building Envelope						
- Structural	or			\$0			
- Roof: Low Slope	or	\$438,725		\$438,725	Replace Auditorium, New Gym, and Old Gym Roofs	2019	\$0
- Roof: Low Slope	or	\$937,020		\$937,020	Replace New & Original Classroom Bldgs., Office Area	2019	\$0
- Exterior Walls	or			\$0			
- Exterior Doors	or		30	\$300.00	Clean / Paint All Exterior Doors	2021	\$810
- Windows	or			\$0			
-	or			\$0			
	Building Finishes						
- Flooring: VCT / Vinyl	or			\$0			
- Flooring: Hard Tile / Terrazzo	or			\$0			
- Flooring: Sports Flooring	or		2	\$20,000.00	Refinish Gym Floors (Two Gyms)	2021	\$3,600
- Ceiling: ACT	or			\$0			
- Walls: Painting	or		156,380		Per 7-Year Cycle	2021	\$0
- Casework	or			\$0	Replace Science Lab Casework (Included in 20 Year Renovation)	2021	\$0
- Interior Doors / Windows	or		156,380				
- ADA / Code Upgrades	or	\$10,000		\$10,000	Upgrade Miscellaneous Building Items	2021	\$900
- Asbestos Abatement	or		156,380	\$1.40	Pre 1989 CMU Walls & Remove Asbestos Flooring (+/- 160k sf)	2021	\$19,704
- Other	or		900	\$175.00	Replace Gym Bleachers	2021	\$14,175
-	or			\$0			
	Building Systems						
- Food Service	or	\$250,000		\$250,000	Replace Hood, Dish Washer, Cooler / Freezer	2021	\$22,500
- Food Service	or	\$85,000		\$85,000	Refresh Kitchen Equipment	2025	\$22,950
- Plumbing	or		2	\$10,000.00	Replace Water Heaters (2) 125 Gal	2021	\$1,800
- Plumbing	or			\$0	Replace Roof Drain System (Included in Roofing Package)	2019	\$0
- Fire Sprinkler	or			\$0			
- HVAC	or		156,380	\$37.00	Complete HVAC Replacement, Convert from 2 pipe to 4 pipe	2020	\$260,373
- HVAC	or		156,380	\$3.25	Replace Controls - Power 20 Year Cycle	2020	\$22,871
- Electrical	or		150,000	\$1.50	Replace Balance of T8s to LED	2021	\$20,250
- Electrical	or			\$0	This Site Has A Generator (Review at Next Update)		
- Fire Alarm	or		156,380		Full System Replacement - Per 20 Year Cycle (2015)	2035	\$0
- Security: Cameras	or		60	\$1,000.00	Upgrade Existing "Older" I.P. Cameras & Server	2021	\$5,400
- Security: Intrusion	or			\$0	Head End Replacement - Per 20 Year Cycle (2015)	2035	\$0
- Intercom	or			\$0	Full System Replacement - Per 20 Year Cycle (2015)	2035	\$0
- Access Controls	or	\$25,000		\$25,000	S2 Door Access	2021	\$2,250
	Technology						
- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle		
- UPS	or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks	or			\$0	Additional Drops		
- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle		
-	or			\$0			
	Facility Improvements Sub Total						
				\$13,772,472			
II B	Support Costs						
Prof/Pm/Support Fees		10%		\$1,377,247		2020	\$61,976
Survey/Testing		1.5%		\$206,587		2021	\$18,593
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E		3.0%		\$413,174	Allowance - Refresh & Wrestling Mat	2021	\$37,186
Land Purchase				\$0			
Contingency		10%		\$1,377,247		2021	\$123,952
	Support Costs Subtotal						
				\$3,374,256			
	Program Subtotal						
				\$17,146,728			
	Program Escalation						
				\$1,117,729			\$1,117,729
	Program Total						
				\$18,264,457			



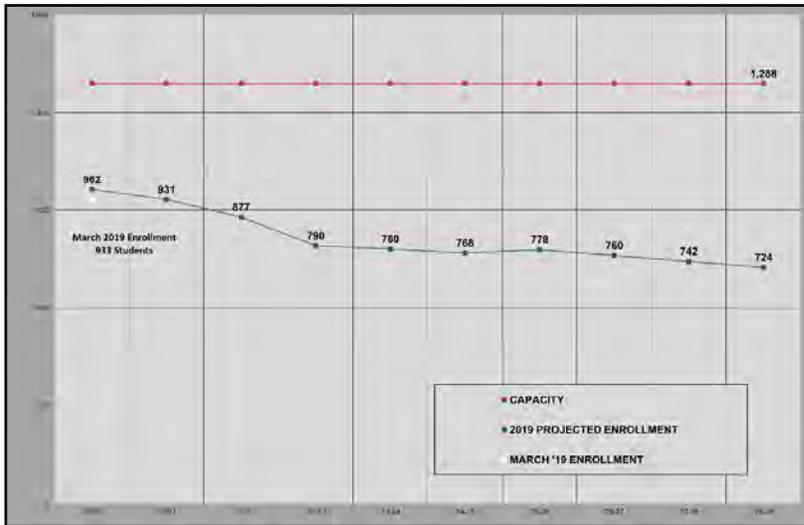
GEORGE L CARRINGTON MIDDLE

227 MILTON ROAD

School #: 316
Building Size: 207,804 Square Feet
Grade Level: 6-8
Year Built: 1964, '84, '05
Site Size: 66.1 Acres

SUMMARY

Built in 1964 with additions / renovations in 1984 and most recently, a 44,733 square foot addition in 2004, Carrington Middle School will be needing a large amount of new and deferred maintenance over the next ten years, which includes a 20 year cycle renovation, athletic and site repairs / upgrades, roof replacement, food service equipment, HVAC Systems, and electrical systems such as fire alarm replacement. With regard to capacity and enrollment, this facility has a capacity of 1,288 students but only 933 students currently enrolled. Over the next ten years, the enrollment is projected to decrease to 724 in 2028, which equates to a 56% occupancy level.



Current Capacity: 1,288 Students

Current Enrollment: 933 Students
72%

Projected Enrollment: 724 Students
56%

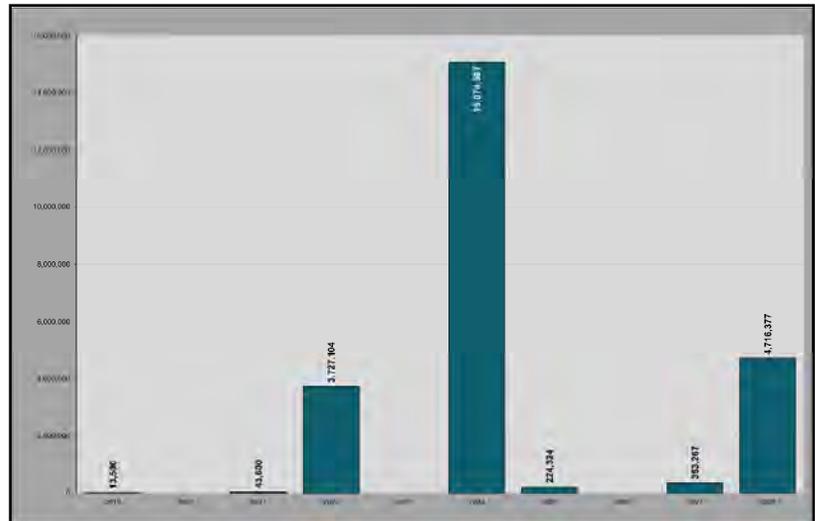
Square Feet per Student: 161.3 sf

Facility Condition Index: .38

New Construction: \$441,600

Current / Deferred Maintenance: \$23,711,159

Total Facility Needs: \$24,152,759



Durham Public Schools Capital Improvement Plan			George L. Carrington Middle		921	Summary Sheet		
Category/Description	Campus Program Total		\$ 24,152,759		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A Facility Improvements:								
New Construction					Currently at 72% Occupancy Level and will increase to 56%			
- Addition		or		\$0	Remove Mobile Units	2024	\$0	
- Addition		or	2,000	\$150.00	\$300,000	New Restroom Facility for Athletic Fields	2022	\$40,500
-		or			\$0			
Renovation								
- 20 Year Renovation		or	163,071	\$25.00	\$4,076,775	20 Year Cycle Renovation	2024	\$917,274
- 20 Year Renovation		or	44,733	\$25.00	\$1,118,325	20 Year Cycle Renovation - 2004 Addition	2024	\$251,623
- Replace Dugouts		or	4	\$15,000.00	\$60,000	Replace Baseball and Softball Dugouts	2024	\$13,500
- Security Vestibule		or			\$0	Develop Passive Security at Front Office (2019)	2019	\$0
- Theater Arts Renovation	\$300,000	or			\$300,000	A/V, Lights, Rigging	2024	\$0
Site								
- Grading for New Construction	\$20,000	or			\$20,000	Site Prep for Restroom Facility at Athletic Fields	2022	\$2,700
- Drainage / Erosion		or			\$0			
- Landscaping / Grassing	\$5,000	or			\$5,000	Landscape Refresh	2024	\$1,125
- Irrigation		or	4	\$20,000.00	\$80,000	Irrigate 4 Athletic Fields	2022	\$10,800
- Athletic Field(s) / Playground(s)	\$75,000	or			\$75,000	Resurface Track	2022	\$10,125
- Athletic Field(s) / Playground(s)		or	4	\$17,500.00	\$70,000	Regrade Football, Soccer, Baseball & Softball / Irrigation (Survey)	2022	\$9,450
- Athletic Field(s) / Playground(s)		or	1,200	\$175.00	\$210,000	Replace Football Field Bleachers	2022	\$28,350
- Athletic / Playground Equipment		or			\$0			
- Parking Lot(s)	\$10,000	or			\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2019	\$0
- Parking Lot(s)		or	6,500	\$18.00	\$117,000	Resurface Bus Parking Lot	2022	\$15,795
- Driveway(s) / Turn lane(s)		or	500	\$30.00	\$15,000	Pave Gravel Drive at Athletic Fields (EMS Access to Football Field)	2022	\$2,025
- Sidewalks		or			\$0			
- ADA		or			\$0			
- Fencing		or			\$0			
- Site Lighting		or			\$0	Duke Energy Owned System		
-		or			\$0			
Building Envelope								
- Structural		or			\$0			
- Roof: Low Slope	\$3,356,852	or			\$3,356,852	Replace Cafeteria Addition & New Stairwell L & Commons	2028	\$1,359,525
- Roof: Metal		or			\$0			
- Exterior Walls		or			\$0			
- Exterior Doors		or			\$0			
- Windows		or			\$0			
-		or			\$0			
Building Finishes								
- Flooring: VGT / Vinyl		or			\$0			
- Flooring: Hard Tile / Terrazzo		or			\$0			
- Flooring: Sports Flooring		or	2	\$20,000.00	\$40,000	Refinish Gym Floor	2024	\$9,000
- Ceiling: ACT		or			\$0			
- Walls: Painting		or	207,804	\$1.50	\$311,706	Per 7-Year Cycle (Included in 20 Year Renovation)	2024	\$70,134
- Casework		or			\$0			
- Interior Doors / Windows		or			\$0			
- ADA / Code Upgrades	\$5,000	or			\$5,000	Upgrade Miscellaneous Building Items (1964, 1984)	2024	\$1,125
- Asbestos Abatement		or	163,071	\$1.40	\$228,299	Pre 1989 CMU Walls	2024	\$51,367
- Other		or	900	\$175.00	\$157,500	Replace Gym Bleachers	2024	\$35,438
-		or			\$0			
Building Systems								
- Food Service	\$250,000	or			\$250,000	Replace Hood, Dish Washer, & Cooler / Freezer	2024	\$56,250
- Food Service	\$85,000	or			\$85,000	Refresh Kitchen Equipment	2024	\$19,125
- Plumbing		or	207,804	\$1.25	\$259,755	Replace Domestic Boiler	2027	\$93,512
- Plumbing		or	15	\$500.00	\$7,500	Replace Hose Bibs	2024	\$1,688
- Fire Sprinkler		or			\$0			
- HVAC		or	207,804	\$4.00	\$831,216	Replace Chillers Per 12 Year Cycle (2010)	2022	\$112,214
- HVAC		or	207,804	\$2.00	\$415,608	Replace Boilers - Per 20 Year Cycle	2024	\$93,512
- HVAC		or	207,804	\$12.00	\$2,493,648	Replace AHUs	2024	\$561,071
- HVAC		or	207,804		\$0	Replace Controls - Per 20 Year Cycle (2010)	2030	\$0
- Electrical	\$3,500	or			\$3,500	Investigate Replacing Sub Panels	2019	\$0
- Fire Alarm		or	207,804	\$2.50	\$519,510	Full System Replacement - Per 20 Year Cycle	2024	\$116,890
- Security: Cameras		or	10	\$1,000.00	\$10,000	Upgrade Existing "Older" I.P. Cameras (Survey)	2024	\$2,250
- Security: Intrusion	\$6,931	or			\$6,931	Head End Replacement - Per 20 Year Cycle	2024	\$1,559
- Intercom		or	207,804	\$0.85	\$176,633	Full System Replacement - Per 20 Year Cycle	2025	\$47,691
- Access Controls		or	40	\$1,000.00	\$40,000	S2 Door Access	2021	\$3,600
Technology								
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle		
- UPS		or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or			\$0	Additional Drops		
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle		
-		or			\$0			
Facility Improvements Sub Total					\$15,655,759			
II B Support Costs								
Prof/Pm/Support Fees	10%				\$1,565,576		2022	\$211,353
Survey/Testing	1.5%				\$234,836		2024	\$52,838
Storage and Moving					\$0			
City Fees/County					\$0			
FF&E	3.0%				\$469,673	Allowance - Refresh & Wrestling Mat	2024	\$105,676
Land Purchase					\$0			
Contingency	10%				\$1,565,576		2024	\$352,255
Support Costs Subtotal					\$3,835,661			
Program Subtotal					\$19,491,420			
Program Escalation					\$4,661,339			\$4,661,339
Program Total					\$24,152,759			



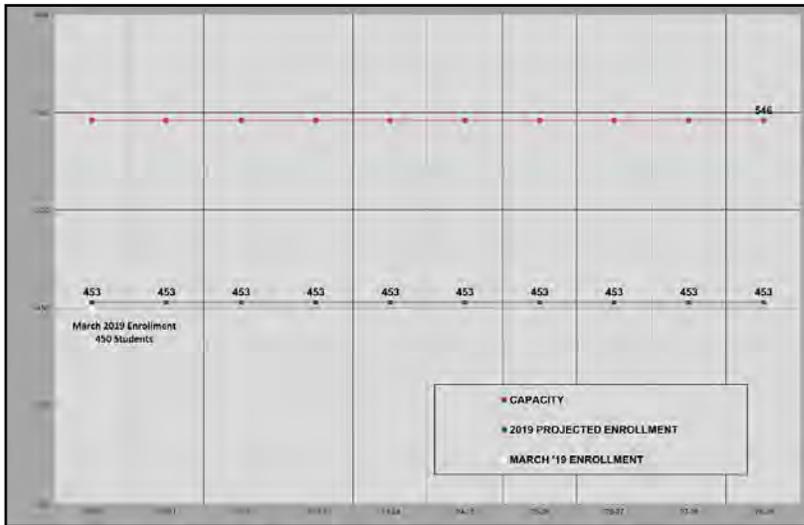
JAMES E SHEPARD MIDDLE

2401 DAKOTA STREET

School #: 338
Building Size: 96,870 Square Feet
Grade Level: 6-8
Year Built: 1964, '66, '01, '11
Site Size: 22.5 Acres

SUMMARY

Shepard Middle School, which was built in 1964, received a significant renovation in 2012, however, major systems will need attention such as roofing, kitchen equipment, etc. over the next ten years. The current student capacity is 546 but the enrollment as of March is only 450, equating to an 82% occupancy level. Over the next ten years, the enrollment will remain 453 due to the facility being a magnet.



Current Capacity: 546 Students

Current Enrollment: 450 Students
82%

Projected Enrollment: 453 Students
83%

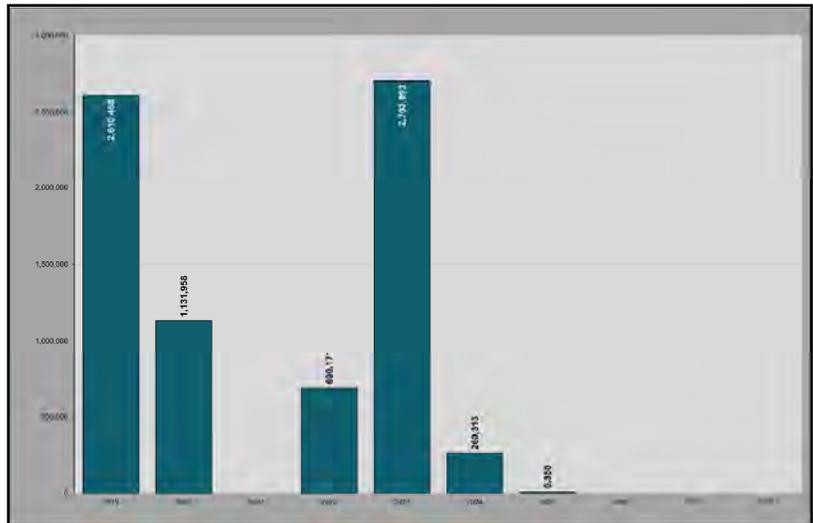
Square Feet per Student: 177.4 sf

Facility Condition Index: .25

New Construction: \$22,080

Current / Deferred Maintenance: \$7,381,073

Total Facility Needs: \$7,403,153



Durham Public Schools Capital Improvement Plan			James E Shepard Middle		451	Summary Sheet	
Category/Description	Campus Program Total		\$ 7,403,153		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction					Currently at 82% Occupancy Level and will remain at 82%		
- New Dugouts		or 4	\$4,000.00	\$16,000	New Baseball and Softball Dugouts	2022	\$2,160
- Canopies		or		\$0			
-		or		\$0			
Renovation							
- 20 Year Renovation		or		\$0	Facility Renovated (2012)	2032	\$0
- Full Renovation of Auditorium		or 14,850	\$50.00	\$742,500	Renovation of Flooring / Seating / Lights / Sound System	2019	\$0
- Full Renovation of Kitchen		or 1,500	\$125.00	\$187,500	Full Kitchen Renovation	2019	\$0
- Security Vestibule		or		\$0	Develop Passive Security at Front Office (2019)		
- Theater Arts Renovation	\$300,000	or		\$300,000	A/V, Lights, Rigging	2019	\$0
Site							
- Grading for New Construction		or		\$0			
- Drainage / Erosion	\$40,000	or		\$40,000	Add Retaining Wall (+/- 300 LF) and Storm Sewer at Auditorium	2022	\$5,400
- Landscaping / Grassing	\$5,000	or		\$5,000	Refresh Landscaping	2025	\$1,350
- Irrigation		or 2	\$20,000.00	\$40,000	Irrigate Baseball and Softball	2022	\$5,400
- Athletic Field(s) / Playground(s)		or 3	\$17,500.00	\$52,500	Regrade Football, Baseball, Softball	2022	\$7,086
- Athletic Field(s) / Playground(s)		or 500	\$175.00	\$87,500	Replace Football Field Bleachers	2022	\$11,813
- Athletic / Playground Equipment		or		\$0			
- Parking Lot(s)	\$10,000	or		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2019	\$0
- Driveway(s) / Turn lane(s)		or		\$0			
- Sidewalks	\$5,000	or		\$5,000	Allowance: Repair Sidewalk along Dakota Street	2019	\$0
- ADA		or		\$0			
- Fencing		or 1,000	\$24.00	\$24,000	Replace Baseball and Softball Fencing (5' Fencing)	2022	\$3,240
- Site Lighting		or		\$0	Duke Energy Owned System		
- Utilities		or		\$0			
-		or		\$0			
Building Envelope							
- Structural		or		\$0			
- Roof: Low Slope	\$1,583,435	or		\$1,583,435	Replace Auditorium, Main Building, Gym, Sect. D Canopy Roofs	2023	\$285,018
- Roof: Low Slope	\$42,000	or		\$42,000	Repair Drainage Issue at Roof	2023	\$7,560
- Roof: Metal		or		\$0			
- Exterior Walls	\$5,000	or		\$5,000	Pressure Wash Exterior	2019	\$0
- Exterior Walls	\$650,000	or		\$650,000	Remove Metal Panels at Roof Edge, add sheeting, waterproofing	2023	\$117,000
- Exterior Doors		or 30	\$250.00	\$7,500	Clean and Paint Exterior Doors	2019	\$0
- Windows		or		\$0			
-		or		\$0			
Building Finishes							
- Flooring: VCT / Vinyl		or		\$0	Black Adhesive Seeping Through Joints (Possible Water Issue)		
- Flooring: Sports Flooring		or 1	\$20,000.00	\$20,000	Refinish Gym Floor (Survey)	2022	\$2,700
- Ceiling: ACT		or		\$0			
- Walls: Painting		or 73,858	\$1.50	\$110,787	Per 7-Year Cycle (2012)	2019	\$0
- Casework		or		\$0			
- Interior Doors / Windows		or		\$0			
- ADA / Code Upgrades	\$7,500	or		\$7,500	Stage is not ADA Accessible (Add Lift / Ramp)	2019	\$0
- Asbestos Abatement		or 96,870		\$0	Pre 1989 CMU Walls - Renovated in 2011 but constructed in 1960's	2032	\$0
-		or		\$0			
Building Systems							
- Food Service	\$250,000	or		\$250,000	Replace All Kitchen Equipment	2020	\$11,250
- Food Service	\$85,000	or		\$85,000	Refresh Kitchen Equipment	2024	\$19,125
- Plumbing		or 2	\$10,000.00	\$20,000	Replace Water Heaters (2) 125 Gal	2019	\$0
- Plumbing		or 5	\$500.00	\$2,500	Replace Hose Bibs	2019	\$0
- Fire Sprinkler		or		\$0			
- HVAC		or 14,850	\$40.75	\$605,138	Replace Auditorium Units	2019	\$0
- HVAC		or 82,020	\$4.00	\$328,080	Replace Chillers Per 12 Year Cycle (2) 2010	2022	\$44,291
- HVAC		or 82,020		\$0	Replace Boilers (2) - Per 20 Year Cycle (2010)	2030	\$0
- HVAC		or 82,020		\$0	Replace AHUs	2030	\$0
- HVAC		or 82,020		\$0	Replace Controls - Per 20 Year Cycle (2010)	2030	\$0
- Electrical		or 85,000	\$1.50	\$127,500	Replace T8s to LED	2024	\$28,688
- Fire Alarm		or		\$0	Full System Replacement - Per 20 Year Cycle (2012)	2032	\$0
- Security: Cameras		or 16	\$1,000.00	\$16,000	Upgrade Existing "Older" I.P. Cameras	2023	\$2,880
- Security: Intrusion	\$10,000	or		\$10,000	Head End Replacement - Per 20 Year Cycle	2020	\$450
- Intercom	\$30,000	or		\$30,000	Head End Replacement - Per 20 Year Cycle	2020	\$1,350
- Access Controls	\$60,000	or		\$60,000	S2 Door Access	2019	\$0
Technology							
- Route / Switch Equipment		or		\$0	Replace - Per 5 Year Cycle		
- UPS		or		\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or		\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or		\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or		\$0	Additional Drops		
- Classroom A/V		or		\$0	Replace - Per 5 Year Cycle		
-		or		\$0			
Facility Improvements Sub Total				\$5,470,440			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$547,044		2019	\$0
Survey/Testing	1.5%			\$82,057		2020	\$3,693
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3%			\$164,113	Allowance - Refresh & Wrestling Mat	2020	\$7,385
Land Purchase				\$0			
Contingency	10%			\$547,044		2020	\$24,617
Support Costs Subtotal				\$1,340,258			
Program Subtotal				\$6,810,697			
Program Escalation				\$592,456			\$592,456
Program Total				\$7,403,153			



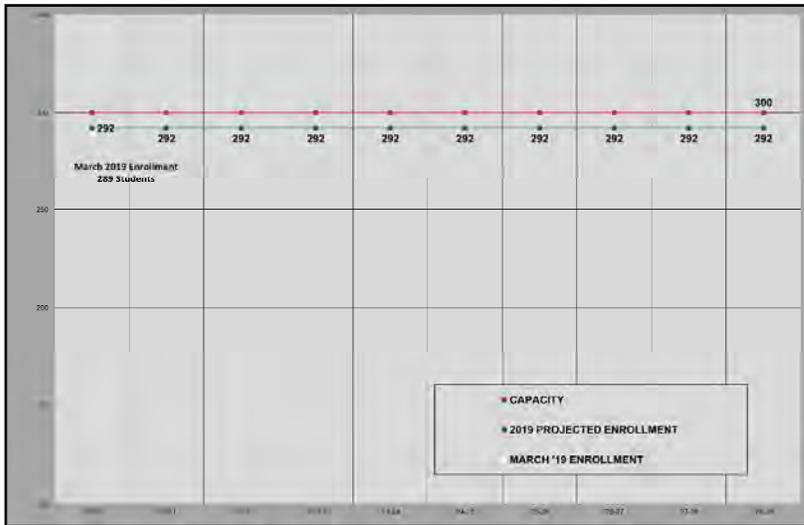
LAKEWOOD MONTESSORI MIDDLE

2119 CHAPEL HILL ROAD

- School #:** 342
- Building Size:** 71,278 Square Feet
- Grade Level:** 6-8
- Year Built:** 2011
- Site Size:** 7.3 Acres

SUMMARY

One of DPS' newest facilities, Lakewood Montessori Middle School opened in 2011 with a capacity of 300 students and because the facility is a choice school, enrollment can be managed using a cap and therefore, the enrollment should not exceed 292 over the next ten years. The facility has a low FCI of 0.05 but future maintenance will include sitework and replacement of HVAC chillers.



Current Capacity: 300 Students

Current Enrollment: 289 Students
96%

Projected Enrollment: 292 Students
97%

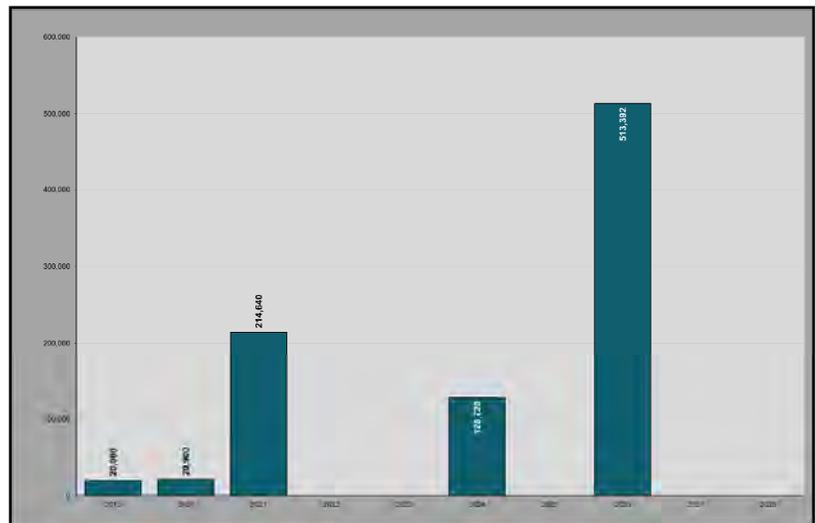
Square Feet per Student: 237.6 sf

Facility Condition Index: .06

New Construction: \$0

Current / Deferred Maintenance: \$897,652

Total Facility Needs: \$897,652



Durham Public Schools Capital Improvement Plan			Lakewood Montessori Middle		292	Summary Sheet	
Category/Description	Campus Program Total		\$ 897,652		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction					Currently at 96% Occupancy Level and will increase to 97%.		
- Addition		or		\$0	Opened in 2011		
-		or		\$0			
Renovation							
- 20-Year Renovation		or		\$0	20 Year Renovation	2031	\$0
- 20-Year Renovation	\$5,000	or		\$5,000	Investigate conversion of Patio to Office Space	2019	\$0
Site							
- Grading for New Construction		or		\$0			
- Drainage / Erosion		or		\$0			
- Landscaping / Grassing		or		\$0	Refresh Landscape	2031	\$0
- Irrigation		or	1	\$20,000.00	Irrigate Athletic Field	2021	\$1,800
- Athletic Field(s) / Playground(s)		or		\$0			
- Athletic Field(s) / Playground(s)		or	1	\$17,500.00	Regrade Football / Soccer	2021	\$1,575
- Athletic Field(s) / Playground(s)		or	300	\$175.00	Add Football Field Bleachers	2021	\$4,725
- Athletic / Playground Equipment		or		\$0			
- Parking Lot(s)		or		\$0			
- Driveway(s) / Turn lane(s)		or		\$0			
- Sidewalks		or		\$0			
- ADA		or		\$0			
- Fencing		or		\$0			
- Site Lighting		or		\$0	Duke Energy Owned System		
- Utilities		or		\$0			
-		or		\$0			
Building Envelope							
- Structural	\$5,000	or		\$5,000	Investigate Cracks / Settlement at Principal Area	2019	\$0
- Roof: Low Slope		or		\$0			
- Roof: Metal		or		\$0			
- Roof: Shingle		or		\$0			
- Exterior Walls		or		\$0			
- Exterior Doors		or		\$0			
- Storefronts / Window Walls		or		\$0			
- Windows		or		\$0			
-		or		\$0			
Building Finishes							
- Flooring: VCT / Vinyl		or		\$0			
- Flooring: Hard Tile / Terrazzo		or		\$0			
- Flooring: Sports Flooring		or	1	\$20,000.00	Refinish Gym Floor	2026	\$6,300
- Ceiling: ACT		or		\$0			
- Ceiling: Other		or		\$0			
- Walls: Painting		or	71,278	\$1.50	Per 7 Year Cycle	2021	\$9,623
- Walls: Other		or		\$0			
- Casework		or		\$0			
- Interior Doors / Windows		or		\$0			
- ADA / Code Upgrades		or		\$0			
- Asbestos Abatement		or		\$0			
-		or		\$0			
Building Systems							
- Food Service		or		\$0			
- Plumbing		or	1	\$10,000.00	Replace PVI Heaters (100 Gal)	2019	\$0
- Fire Sprinkler		or		\$0			
- HVAC		or	71,278	\$4.00	Replace Chillers Per 12 Year Cycle (2)	2026	\$89,810
- HVAC		or	71,278	\$0	Replace Boilers (3) - Per 20 Year Cycle	2031	\$0
- HVAC		or	71,278	\$0	Replace VAV	2031	\$0
- HVAC		or	71,278	\$0	Replace Controls - Per 20 Year Cycle	2031	\$0
- Electrical		or	71,278	\$0	Replace T8s to LED	2031	\$0
- Fire Alarm		or		\$0	Replace System - Per 20 Year Cycle (2011)	2031	\$0
- Security: Cameras		or	37	\$1,250.00	Upgrade Existing "Older" I.P. Cameras & Server	2024	\$10,406
- Security: Intrusion		or		\$0	Replace System - Per 20 Year Cycle (2011)	2031	\$0
- Intercom		or		\$0			
- Access Controls	\$20,000	or		\$20,000	S2 Door Access	2020	\$900
Technology							
- Route / Switch Equipment		or		\$0	Replace - Per 5 Year Cycle		
- UPS		or		\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or		\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or		\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or		\$0	Additional Drops		
- Classroom A/V		or		\$0	Replace - Per 5 Year Cycle		
-		or		\$0			
Facility Improvements Sub Total				\$588,279			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$58,828		2024	\$13,236
Survey/Testing	1.5%			\$8,824		2026	\$2,780
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3%			\$17,648	Allowance - Refresh & Wrestling Mat	2026	\$5,559
Land Purchase				\$0			
Contingency	10%			\$58,828		2026	\$18,531
Support Costs Subtotal				\$144,128			
Program Subtotal				\$732,407			
Program Escalation				\$165,245			\$165,245
Program Total				\$897,652			



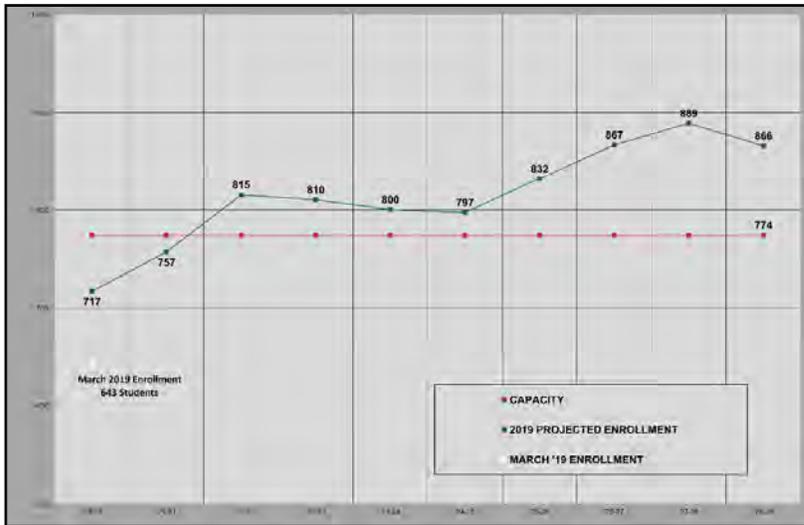
LOWE'S GROVE MIDDLE

4418 S. ALSTON AVENUE

- School #:** 346
- Building Size:** 122,504 Square Feet
- Grade Level:** 6-8
- Year Built:** 1975, '09
- Site Size:** 28.0 Acres

SUMMARY

Lowe's Grove Middle School was built in 1975 and was fully renovated in 2009. Upcoming needs include roofing and HVAC as well as some sitework associated with athletics. The facility has a capacity of 774 students and as of March 2019, had an enrollment of 643 students and the trend is for the enrollment to grow to 866 in 2028 therefore a classroom addition is recommended to address the overcrowding unless there is redistricting of student assignment.



Current Capacity: 774 Students

Current Enrollment: 643 Students
83%

Projected Enrollment: 866 Students
112%

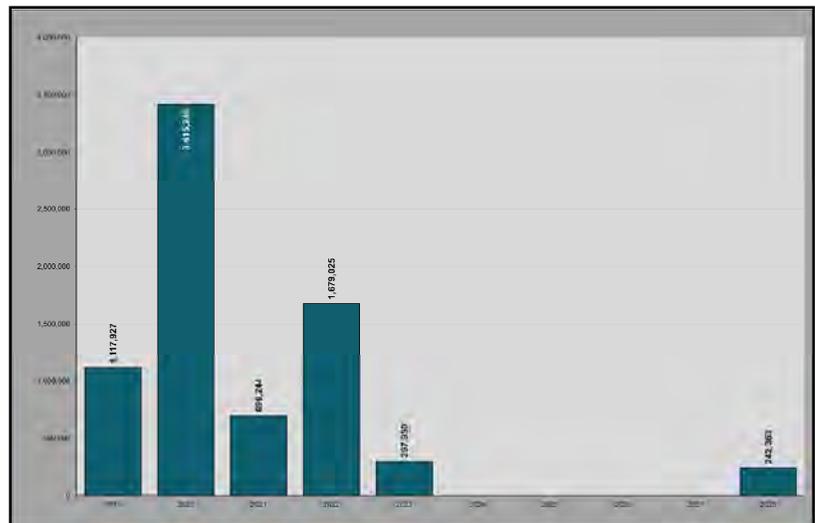
Square Feet per Student: 158.3 sf

Facility Condition Index: .20

New Construction: \$1,676,700

Current / Deferred Maintenance: \$5,772,056

Total Facility Needs: \$7,448,756



Durham Public Schools Capital Improvement Plan			Lowe's Grove Middle		627	Summary Sheet	
Category/Description	Campus Program Total		\$ 7,448,756		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction					Currently at 83% Occupancy Level and will increase to 112%		
- Addition		or 4,000	\$200.00	\$800,000	Four (4) Classroom Addition for Capacity	2022	\$108,000
- Addition		or 2,000	\$150.00	\$300,000	New Storage Building for Athletic Fields	2022	\$40,500
-		or		\$0			
Renovation							
- 20 Year Renovation		or 122,504		\$0	Facility Renovated in 2009	2029	\$0
- 20 Year Renovation		or		\$0	Gym Renovations (2017)	2037	\$0
- 20 Year Renovation		or 4,000	\$100.00	\$400,000	Allowance: Renovate Group Restrooms (Plumbing In Bad Shape)	2021	\$36,000
- Security Vestibule		or		\$0	Develop Passive Security at Front Office (2019)		
- Theater Arts Renovation	\$300,000	or		\$300,000	A/V, Lights, Rigging	2022	\$0
Site							
- Grading for New Construction	\$115,000	or		\$115,000	Site Prep for Classroom Addition	2022	\$15,525
- Drainage / Erosion	\$7,500	or		\$7,500	Allowance: Drainage Issue at Mechanical Room / Gym (CB and Pipe)	2019	\$0
- Drainage / Erosion	\$7,500	or		\$7,500	Allowance: Drainage Issue at Emergency Drive	2019	\$0
- Landscaping / Grassing	\$5,000	or		\$5,000	Landscape Refresh	2023	\$900
- Irrigation		or 1	\$20,000.00	\$20,000	Irrigate 3 Athletic Fields	2023	\$3,600
- Athletic Field(s) / Playground(s)		or 4	\$17,500.00	\$70,000	Regrade Football, Soccer, Baseball, Softball	2023	\$12,600
- Athletic Field(s) / Playground(s)		or 900	\$175.00	\$157,500	Replace Football Field Bleachers	2023	\$28,350
- Athletic / Playground Equipment		or		\$0			
- Parking Lot(s)	\$10,000	or		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2019	\$0
- Driveway(s) / Turn lane(s)	\$7,500	or		\$7,500	Allowance: Repair Asphalt at Dumpster Pad	2019	\$0
- Driveway(s) / Turn lane(s)	\$10,000	or		\$10,000	Allowance: Repair Student Drive at Jester Road	2019	\$0
- Sidewalks		or		\$0			
- ADA		or		\$0			
- Fencing		or 1,000	\$24.00	\$24,000	Add 5ft Black Vinyl Site Fencing	2019	\$0
- Utilities		or		\$0	Duke Energy Owned System		
-		or		\$0			
Building Envelope							
- Structural		or		\$0			
- Roof: Low Slope		or		\$0	Replace Media Center and Gym Roofs (2019)	2039	\$0
- Roof: Low Slope		or		\$0	Replace Front Classroom Bldg., Cafeteria, Corridor, Voc Ed (2019)	2039	\$0
- Roof: Shingle		or		\$0			
- Exterior Walls	\$450,000	or		\$450,000	Allowance: Repair Veneer Issues at Gym	2019	\$0
- Exterior Walls	\$10,000	or		\$10,000	Clean and Paint Front Entrance	2021	\$900
- Exterior Doors		or		\$0			
- Windows		or		\$0			
-		or		\$0			
Building Finishes							
- Flooring: VCT / Vinyl		or		\$0			
- Flooring: Hard Tile / Terrazzo		or		\$0			
- Flooring: Sports Flooring		or		\$0	Refinish Gym Floor (2017)	2030	\$0
- Ceiling: ACT		or		\$0			
- Walls: Painting		or 122,504	\$1.50	\$183,756	Per 7-Year Cycle	2021	\$16,538
- Casework		or		\$0			
- Interior Doors / Windows		or		\$0			
- ADA / Code Upgrades		or		\$0			
- Asbestos Abatement		or 122,504		\$0	Pre 1989 CMU Walls	2029	\$0
-		or		\$0			
Building Systems							
- Food Service		or		\$0	Replace Cooler / Freezer (2009)	2029	\$0
- Food Service		or		\$0	Replace Hood, Dish Washer, Kitchen Equipment	2029	\$0
- Plumbing		or 2	\$10,000.00	\$20,000	Replace Water Heaters (2) 125 Gal	2021	\$1,800
- Fire Sprinkler		or		\$0			
- HVAC		or 122,504	\$4.00	\$490,016	Replace Chiller Per 12 Year Cycle (2007)	2020	\$22,051
- HVAC		or 122,504	\$2.00	\$245,008	Replace Boilers (2) - Per 20 Year Cycle	2020	\$11,025
- HVAC		or 122,504	\$14.00	\$1,715,056	Replace AHUs	2020	\$77,178
- HVAC		or 122,504		\$0	Replace Controls - Per 20 Year Cycle (2016)	2036	\$0
- Electrical		or 115,000	\$1.50	\$172,500	Replace T8s to LED	2028	\$69,863
- Fire Alarm		or		\$0	Full System Replacement - Per 20 Year Cycle (2009)	2029	\$0
- Security: Cameras		or 12	\$1,000.00	\$12,000	Upgrade Existing "Older" I.P. Cameras	2019	\$0
- Security: Intrusion	\$6,931	or		\$6,931	Head End Replacement - Per 20 Year Cycle	2020	\$312
- Intercom	\$30,000	or		\$30,000	Head End Replacement - Per 20 Year Cycle	2019	\$0
- Access Controls	\$25,000	or		\$25,000	S2 Door Access	2021	\$2,250
Technology							
- Route / Switch Equipment		or		\$0	Replace - Per 5 Year Cycle		
- UPS		or		\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or		\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or		\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or		\$0	Additional Drops		
- Classroom A/V		or		\$0	Replace - Per 5 Year Cycle		
-		or		\$0			
Facility Improvements Sub Total				\$5,594,267			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$559,427		2019	\$0
Survey/Testing	1.5%			\$83,914		2020	\$3,776
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3.0%			\$167,828	Allowance - Refresh & Wrestling Mat	2020	\$7,552
Land Purchase				\$0			
Contingency	10%			\$559,427		2020	\$25,174
Support Costs Subtotal				\$1,370,595			
Program Subtotal				\$6,964,862			
Program Escalation				\$483,894			\$483,894
Program Total				\$7,448,756			



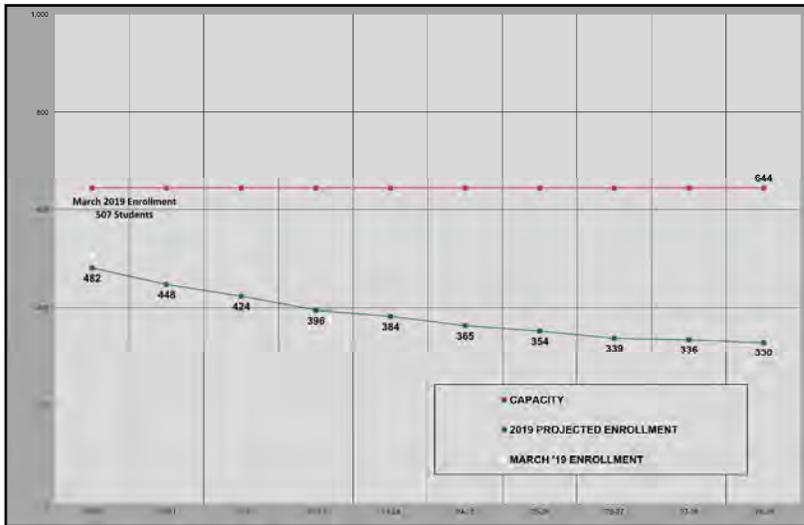
LUCAS MIDDLE

923 SNOW HILL ROAD

- School #:** 343
- Building Size:** 153,593 Square Feet
- Grade Level:** 6-8
- Year Built:** 2012
- Site Size:** 31.8 Acres

SUMMARY

Lucas Middle School was opened for the 2012 school year and is a shared facility with Durham Parks and Recreation. The facility has a capacity of 644 students and the current enrollment is 507 students, which represents a 79% occupancy level; however the forecast is for the enrollment to decrease to 51% in 2028 (330). Due to the newness of the facility, maintenance over the next ten years will be minor and will include items such as site related needs, facility painting, and HVAC chiller replacement.



Current Capacity: 644 Students

Current Enrollment: 507 Students
79%

Projected Enrollment: 330 Students
51%

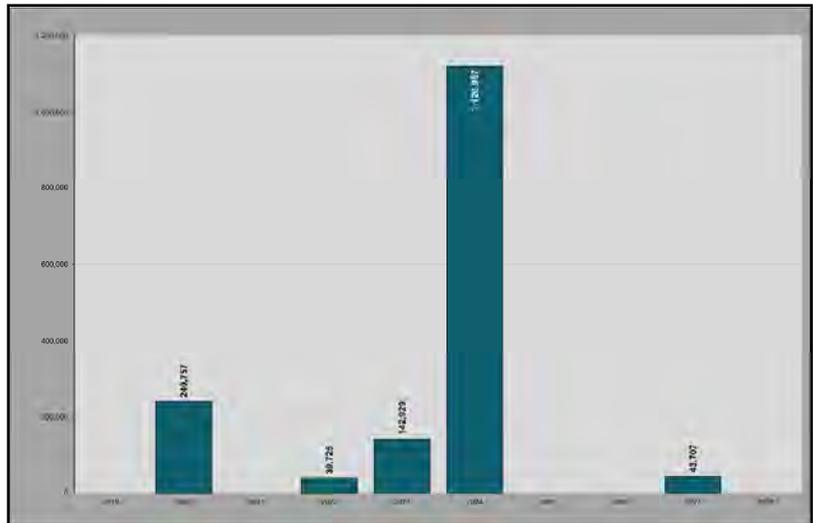
Square Feet per Student: 238.5 sf

Facility Condition Index: .03

New Construction: \$0

Current / Deferred Maintenance: \$1,588,076

Total Facility Needs: \$1,588,076



Durham Public Schools Capital Improvement Plan		Lucas Middle			512	Summary Sheet		
Category/Description	Campus Program Total		\$ 1,588,076		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A	Facility Improvements:							
	New Construction							
	- Addition	or		\$0	Currently at 79% Occupancy Level and will decrease to 51% Opened in 2012			
	-	or		\$0				
	Renovation							
	- 20 Year Renovation	or	153,595	\$0	20 Year Renovation	2032	\$0	
	- Security Vestibule	or		\$0	Develop Passive Security at Interior Hallway (2019)			
	- Theater Arts Renovation	or		\$0	A/V, Lights, Rigging	2032	\$0	
	Site							
	- Grading for New Construction	or		\$0				
	- Drainage / Erosion	or		\$0				
	- Landscaping / Grassing	or		\$0	Landscape Refresh	2032	\$0	
	- Irrigation	or		\$0				
	- Athletic Field(s) / Playground(s)	or	1	\$17,500.00	\$17,500	Regrade Football / Soccer	2024	\$3,938
	- Athletic Field(s) / Playground(s)	or	800	\$175.00	\$140,000	Football Field Bleachers	2024	\$31,500
	- Athletic / Playground Equipment	or		\$0				
	- Parking Lot(s)	or		\$10,000	\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2022	\$1,350
	- Driveway(s) / Turn lane(s)	or		\$0				
	- Sidewalks	or		\$0				
	- ADA	or		\$0				
	- Fencing	or		\$0				
	- Site Lighting	or		\$0	Piedmont Electric Co-Op Owned			
	- Utilities	or		\$0				
	-	or		\$0				
	Building Envelope							
	- Structural	or		\$0				
	- Roof: Low Slope	or		\$0				
	- Roof: Metal	or		\$0				
	- Roof: Shingle	or		\$0				
	- Exterior Walls	or		\$0				
	- Exterior Doors	or		\$0				
	- Storefronts / Window Walls	or		\$0				
	- Windows	or		\$0				
	-	or		\$0				
	Building Finishes							
	- Flooring: VCT / Vinyl	or		\$0				
	- Flooring: Hard Tile / Terrazzo	or		\$0				
	- Flooring: Sports Flooring	or	1	\$20,000.00	\$20,000	Refinish Gym Floor	2024	\$4,500
	- Ceiling: ACT	or		\$0				
	- Ceiling: Other	or		\$0				
	- Walls: Painting	or	153,593	\$1.50	\$230,389	Per 7 Year Cycle	2020	\$10,366
	- Walls: Other	or		\$0				
	- Casework	or		\$0				
	- Interior Doors / Windows	or		\$0				
	- ADA / Code Upgrades	or		\$0				
	- Asbestos Abatement	or		\$0				
	-	or		\$0				
	Building Systems							
	- Food Service	or		\$0				
	- Plumbing	or		\$0				
	- Fire Sprinkler	or		\$0				
	- HVAC	or	153,593	\$4.00	\$614,372	Replace Chillers Per 12 Year Cycle (3) (2012)	2024	\$138,234
	- HVAC	or	153,593	\$0	\$0	Replace Boilers (3) - Per 20 Year Cycle	2032	\$0
	- HVAC	or	153,593	\$0	\$0	Replace AHUs	2032	\$0
	- HVAC	or	153,593	\$0	\$0	Replace Controls - Per 20 Year Cycle	2032	\$0
	- Electrical	or		\$0	\$0	Replace T8s to LED	2032	\$0
	- Fire Alarm	or	153,593	\$0	\$0	Full System Replacement - Per 20 Year Cycle	2032	\$0
	- Security: Cameras	or	14	\$1,000.00	\$14,000	Upgrade Existing "Older" I.P. Cameras	2023	\$2,520
	- Security: Intrusion	or		\$0	\$0	Head End Replacement - Per 20 Year Cycle	2032	\$0
	- Intercom	or		\$0	\$0	Head End Replacement - Per 20 Year Cycle	2033	\$0
	- Access Controls	or	\$25,000	\$0	\$25,000	S2 Door Access	2022	\$3,375
	Technology							
	- Route / Switch Equipment	or		\$0	\$0	Replace - Per 5 Year Cycle		
	- UPS	or		\$0	\$0	Replace - Per 5 Year Cycle		
	- Wireless Access Points	or		\$0	\$0	Replace - Per 5 Year Cycle		
	- VOIP Phones System	or		\$0	\$0	Replace - Per 10 Year Cycle		
	- Data Cabling / Racks	or		\$0	\$0	Additional Drops		
	- Classroom A/V	or		\$0	\$0	Replace - Per 5 Year Cycle		
	-	or		\$0	\$0			
	Facility Improvements Sub Total				\$1,071,262			
II B	Support Costs							
	Prof/Pm/Support Fees		10%	\$107,126		2023	\$19,283	
	Survey/Testing		1.5%	\$16,069		2024	\$3,616	
	Storage and Moving			\$0				
	City Fees/County			\$0				
	FF&E		3.0%	\$32,138	Allowance - Refresh +/- 1/3 Furniture - (15 Year Cycle)	2027	\$11,570	
	Land Purchase			\$0				
	Contingency		10%	\$107,126		2024	\$24,103	
	Support Costs Subtotal				\$262,459			
	Program Subtotal				\$1,333,721			
	Program Escalation				\$254,355		\$254,355	
	Program Total				\$1,588,076			



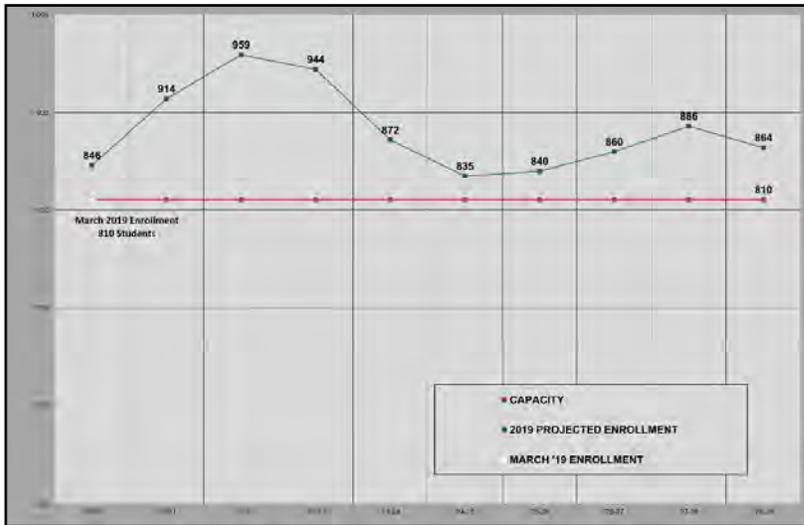
NEAL MIDDLE

201 BAPTIST ROAD

- School #:** 355
- Building Size:** 129,403 Square Feet
- Grade Level:** 6-8
- Year Built:** 1966, '88, '11
- Site Size:** 49.1 Acres

SUMMARY

Neal Middle School has a capacity for 810 students and a 2018 / 2019 enrollment of 810. In 2021, the projected enrollment for this facility will peak at 959 students. However enrollment should slightly decrease through 2028 when an estimated 864 students are projected to attend the school resulting in an occupancy level of 107%, therefore a classroom addition is recommended. The main roof was replaced in 2009, the HVAC chiller and boiler was replaced in 2009, and a 20 year cycle renovation took place in 2011 and therefore the FCI is only 0.01 but a good bit of typical maintenance remains and will need to be addressed over the next ten years, including sitework issues, some interior finishes, and HVAC systems, otherwise the FCI rating will become 0.16.



Current Capacity: 810 Students

Current Enrollment: 810 Students
100%

Projected Enrollment: 864 Students
106%

Square Feet per Student: 159.8 sf

Facility Condition Index: .16

New Construction: \$1,262,700

Current / Deferred Maintenance: \$6,763,002

Total Facility Needs: \$8,025,702



Durham Public Schools Capital Improvement Plan		Neal Middle		789		Summary Sheet	
Category/Description	Campus Program Total		\$ 8,025,702		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A	Facility Improvements:						
	New Construction						
	Currently at 100% Occupancy Level and will increase to 116%						
- Addition		or 4,000	\$200.00	\$800,000	Four (4) Classroom Addition	2022	\$108,000
-				\$0			
	Renovation						
- 20 Year Renovation		or 129,403		\$0	20 Year Renovation (2011)	2031	\$0
- 20 Year Renovation	\$7,500	or		\$7,500	Investigate how to Convert Old "Stage" Area to Classrooms	2019	\$0
- Renovate Dugouts		or 4	\$5,000.00	\$20,000	Replace Baseball & Softball Dugouts	2021	\$1,800
- Theater Arts Renovation	\$300,000	or		\$300,000	A/V, Lights, Rigging	2024	\$67,500
-							
	Site						
- Grading for New Construction	\$115,000	or		\$115,000	Site Prep for Classroom Addition	2022	\$15,925
- Drainage / Erosion		or		\$0			
- Landscaping / Grassing	\$5,000	or		\$5,000	Landscape Refresh	2022	\$675
- Irrigation		or		\$0			
- Athletic Field(s) / Playground(s)	\$25,000	or		\$25,000	Upgrade Field Events	2022	\$3,375
- Athletic Field(s) / Playground(s)		or 4	\$17,500.00	\$70,000	Regrade Football, Soccer, Baseball, Softball	2022	\$9,450
- Athletic Field(s) / Playground(s)		or 900	\$175.00	\$157,500	Add Football Field Bleachers & Press Box (small number of seats currently)	2022	\$21,263
- Athletic Field(s) / Playground(s)	\$75,000	or		\$75,000	Recoat Track	2022	\$10,125
- Athletic Field(s) / Playground(s)	\$10,000	or		\$10,000	Add Foul Pole / Top Fence Rail Protection / Outfield Fence Screen	2022	\$1,350
- Parking Lot(s)		or 7,000	\$18.00	\$126,000	Repair / Overlay Asphalt Paving (add wheel stops)	2020	\$5,670
- Parking Lot(s)		or 15	\$2,250.00	\$33,750	Add Small Parking Lot Behind Gym Building	2022	\$4,556
- Driveway(s) / Turn lanes(s)		or 3,000	\$25.00	\$75,000	Pave Gravel Emergency Drive / Loop (1400lf)	2022	\$10,125
- Sidewalks	\$7,500	or		\$7,500	Add Sidewalk / Access to Baseball Field Bleachers	2019	\$0
- ADA		or		\$0			
- Fencing		or 700	\$24.00	\$16,800	Add Fencing at Side and Back of Soccer Field (+/- 700lf)	2021	\$1,512
- Site Lighting		or		\$0	Duke Energy Owned System		
- Site Lighting	\$7,500	or		\$7,500	Add Exterior Lights at Front Parking Lot	2021	\$675
- Utilities	\$35,000	or		\$35,000	Allowance: Demo Water Tower	2021	\$3,150
-		or		\$0			
	Building Envelope						
- Structural		or		\$0			
- Roof: Low Slope		or		\$0	Low Slope Roof was Replaced in 2009	2029	\$0
- Exterior Walls	\$10,000	or		\$10,000	Re-Caulk All Exterior Control Joints	2019	\$0
- Exterior Walls	\$5,000	or		\$5,000	Pressure Exterior	2019	\$0
- Exterior Walls	\$15,000	or		\$15,000	Repair Metal Facia / Paint	2019	\$0
-		or		\$0			
	Building Finishes						
- Flooring: Hard Tile / Terrazzo	\$5,000	or		\$5,000	Deep Clean Group Restroom Tile Floors	2021	\$450
- Flooring: Carpet		or 2,000	\$4.25	\$8,500	Media Center (Per 10 Year Cycle)	2021	\$765
- Flooring: Sports Flooring		or 2	\$20,000.00	\$40,000	Refinish Gym Floor (2011)	2021	\$3,600
- Ceiling: ACT		or 115,000	\$2.00	\$230,000	2' x 2' ACT is only 8 Years Old but is in bad shape	2024	\$51,750
- Walls: Painting		or 129,403	\$1.50	\$194,105	Per 7-Year Cycle	2021	\$17,469
- Walls: Other	\$7,500	or		\$7,500	Add Stage Curtains in Auditorium	2021	\$675
- Walls: Other	\$2,500	or		\$2,500	Replace Acoustical Panels in Auditorium	2021	\$225
- Other		or		\$0	Remove All Lockers	2029	\$0
-		or		\$0			
	Building Systems						
- Food Service		or		\$0	Renovated in 2011	2026	\$0
- Plumbing		or 2	\$10,000.00	\$20,000	Replace Water Heaters (2) 125 Gal	2021	\$1,800
- Plumbing		or 10	\$500.00	\$5,000	Replace Hose Bibs	2021	\$450
- HVAC		or 5,000	\$75.00	\$375,000	Add HVAC to Small Gym	2021	\$33,750
- HVAC		or 129,403	\$4.00	\$517,612	Replace Chiller Per 12 Year Cycle (4) 2010	2022	\$69,878
- HVAC		or 129,403		\$0	Replace Boiler - Per 20 Year Cycle (2017)	2037	\$0
- HVAC		or 129,403		\$0	Replace Boiler - Per 20 Year Cycle (2010)	2030	\$0
- HVAC		or 129,403	\$14.00	\$1,811,642	Replace AHUs, Piping	2021	\$163,048
- HVAC		or 129,403	\$3.00	\$388,209	Replace Controls - Per 20 Year Cycle	2021	\$34,939
- Electrical		or 120,000	\$1.50	\$180,000	Replace T8s to LED	2021	\$16,200
- Electrical	\$7,500	or		\$7,500	Auditorium - Replace T8s to LED	2021	\$675
- Electrical	\$3,500	or		\$3,500	Investigate Replacing Switchgear	2019	\$0
- Fire Alarm		or 129,403		\$0	Full System Replacement - Per 20 Year Cycle (2011)	2031	\$0
- Security: Cameras		or 50	\$1,000.00	\$50,000	System Augmented by 20 Cameras in 2018 (Total of 70 Cameras)	2024	\$11,250
- Security: Intrusion	\$5,873	or		\$5,873	Head End Replacement - Per 20 Year Cycle	2021	\$529
- Intercom		or		\$0	Head End Replacement - Per 20 Year Cycle (2011)	2031	\$0
- Access Controls	\$25,000	or		\$25,000	S2 Door Access (Three (3) Doors Currently Being Controlled)	2020	\$1,125
-		or		\$0			
	Technology						
- Route / Switch Equipment		or		\$0	Replace - Per 5 Year Cycle		
- UPS		or		\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or		\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or		\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or		\$0	Additional Drops		
- Classroom A/V		or		\$0	Replace - Per 5 Year Cycle		
-		or		\$0			
Facility Improvements Sub Total				\$5,793,491			
II B	Support Costs						
Prof/Pm/Support Fees	10%			\$579,349		2020	\$26,071
Survey/Testing	1.5%			\$86,902		2022	\$11,732
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3%			\$173,805	Allowance - Refresh & Wrestling Mat	2022	\$23,464
Land Purchase				\$0			
Contingency	10%			\$579,349		2022	\$78,212
Support Costs Subtotal				\$1,419,405			
Program Subtotal				\$7,212,896			
Program Escalation				\$812,806			\$812,806
Program Total				\$8,025,702			



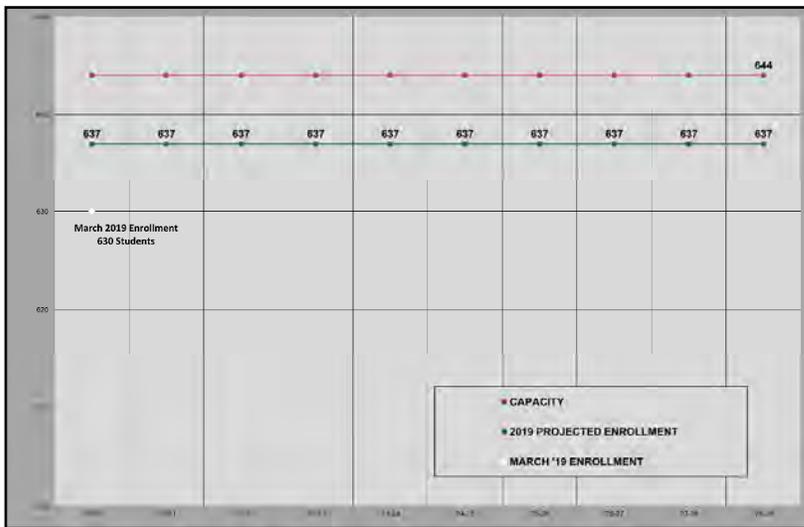
ROGERS-HERR MIDDLE

911 CORNWALLIS ROAD

- School #:** 370
- Building Size:** 122,547 Square Feet
- Grade Level:** 6-8
- Year Built:** 1967, '05
- Site Size:** 23.5 Acres

SUMMARY

Rogers-Herr Middle school is year-round choice facility and enrollment remains at full capacity. Enrollment can, therefore, be managed to balance with capacity, at 637 (through 2028). The facility was opened in 1967 and had an addition and 20 year cycle renovation in 2005 but over the next ten years some additional renovations will be due as well as corrective sitework, roofing, HVAC systems, and electrical needs will need to be addressed.



Current Capacity: 644 Students

Current Enrollment: 630 Students
98%

Projected Enrollment: 637 Students
99%

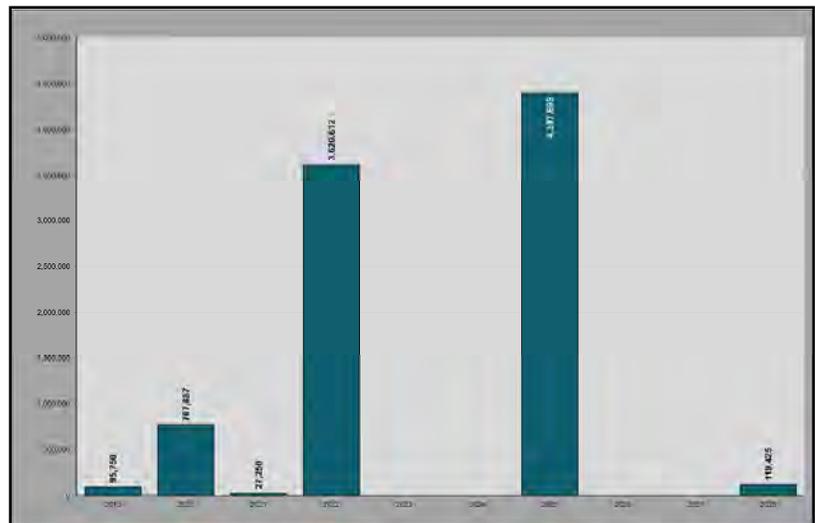
Square Feet per Student: 190.3 sf

Facility Condition Index: .24

New Construction: \$22,080

Current / Deferred Maintenance: \$9,006,540

Total Facility Needs: \$9,028,620



Durham Public Schools Capital Improvement Plan			Rogers-Herr Middle		637	Summary Sheet	
Category/Description	Campus Program Total		\$ 9,028,620		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction					Currently at 98% Occupancy Level and will remain at 98%		
- Addition		or 4	\$4,000.00	\$16,000	New Baseball and Softball Dugouts	2022	\$2,160
-		or		\$0			
Renovation							
- 20 Year Renovation		or 122,547		\$0	20 Year Renovation (2005)	2030	\$0
- 20 Year Renovation		or 4,500	\$75.00	\$337,500	Auditorium (Seating)	2022	\$45,563
- Renovation		or 2,500	\$50.00	\$125,000	Allowance, Concession Stand Renovation	2020	\$5,625
- Security Vestibule	\$70,750	or		\$70,750	Develop Passive Security at Front Office	2019	\$0
- Theater Arts Renovation	\$300,000	or		\$300,000	A/V, Lights, Rigging	2022	\$40,500
-		or					
Site							
- Grading for New Construction		or		\$0			
- Drainage / Erosion	\$10,000	or		\$10,000	Allowance: Large Drainage Issue behind school	2020	\$450
- Drainage / Erosion	\$5,000	or		\$5,000	Allowance: Repair Low Spot due to Backflow Install	2020	\$225
- Landscaping / Grassing	\$5,000	or		\$5,000	Refresh Landscaping	2020	\$225
- Irrigation		or 2	\$20,000.00	\$40,000	Irrigate Baseball and Softball Fields	2020	\$1,800
- Athletic Field(s) / Playground(s)		or 3	\$17,500.00	\$52,500	Regrade Football, Soccer, Baseball, Softball (High Priority)	2020	\$2,363
- Athletic Field(s) / Playground(s)		or 800	\$175.00	\$140,000	Replace Football Field Bleachers	2020	\$6,300
- Athletic Field(s) / Playground(s)	\$50,000	or		\$50,000	Track Maintenance & Add Surface (8 Lane Track)	2020	\$2,250
- Athletic / Playground Equipment	\$16,000	or		\$16,000	Replace Soccer Goals & Field Goal Posts	2020	\$720
- Parking Lot(s)	\$10,000	or		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2020	\$450
- Driveway(s) / Turn lanes(s)	\$15,000	or		\$15,000	Allowance, Repair Circular Section of Driveway at Baseball Field	2020	\$675
- ADA	\$7,500	or		\$7,500	Allowance: ADA Ramp from Track to Courtyard	2020	\$338
- Site Lighting	\$25,000	or		\$25,000	Allowance, Add LED Monument Sign at Front of School	2020	\$1,125
- Site Lighting		or		\$0	Duke Energy Owned System		
- Other	\$50,000	or		\$50,000	Dumpster Pad / Screen Wall	2020	\$2,250
-		or		\$0			
Building Envelope							
- Structural		or		\$0			
- Roof, Low Slope	\$3,680	or		\$3,680	Replace Entry Roof (EPDM)	2022	\$497
- Roof, Low Slope	\$1,287,696	or		\$1,287,696	Replace, Main Bld., Music, Stairwell, Classroom Wing	2022	\$173,839
- Exterior Walls		or		\$0			
- Exterior Doors		or		\$0			
- Windows		or		\$0			
-		or		\$0			
Building Finishes							
- Flooring: VCT / Vinyl		or		\$0			
- Flooring: Sports Flooring		or 2	\$20,000.00	\$40,000	Refinish Gym Floor	2022	\$5,400
- Flooring: Carpet	\$20,000	or		\$20,000	Media Center, Administration Offices	2022	\$2,700
- Ceiling: ACT		or		\$0			
- Walls: Painting		or 122,547	\$1.50	\$188,821	Per 7-Year Cycle	2020	\$8,272
- Walls: Other		or 4	\$7,500.00	\$30,000	Replace Four (4) Basketball Goals	2022	\$4,050
- Casework		or		\$0			
- Interior Doors / Windows		or		\$0			
- ADA / Code Upgrades		or		\$0			
- Asbestos Abatement		or 122,547		\$0	Pre 1989 CMU Walls	2030	\$0
-		or		\$0			
Building Systems							
- Food Service	\$250,000	or		\$250,000	Replace Hood, Dish Washer, Cooler / Freezer	2025	\$67,500
- Food Service	\$85,000	or		\$85,000	Refresh Kitchen Equipment	2028	\$34,425
- Plumbing	\$5,000	or		\$5,000	Investigate Major Sewer Issues Under Slab & To MH	2019	\$0
- Plumbing		or 1	\$10,000.00	\$10,000	Replace Water Heaters (1) 125 Gal (1) 125 Gal was replaced in 2015	2022	\$1,350
- Fire Sprinkler		or		\$0			
- HVAC		or 122,547	\$4.00	\$490,188	Replace Chillers Per 12 Year Cycle (2) 2003, 2010	2022	\$66,175
- HVAC		or 122,547	\$2.00	\$245,094	Replace Boilers (2) - Per 20 Year Cycle (2005)	2025	\$66,175
- HVAC		or 122,547	\$14.00	\$1,715,658	Replace AHUs	2025	\$463,228
- HVAC		or 122,547	\$3.00	\$367,641	Replace Controls - Per 20 Year Cycle (2005)	2025	\$99,263
- Electrical		or		\$0	Gym, Chorus, and Band Lighting Upgrades (2016)		
- Electrical		or		\$0			
- Fire Alarm		or 122,547		\$0	Full System Replacement - Per 20 Year Cycle (2017)	2037	\$0
- Security: Cameras		or 20	\$1,000.00	\$20,000	Upgrade Existing "Older" I.P. Cameras - Add 20 Cameras	2019	\$0
- Security: Intrusion	\$15,000	or		\$15,000	Head End Replacement - Per 20 Year Cycle	2022	\$2,025
- Intercom	\$30,000	or		\$30,000	Head End Replacement - Per 20 Year Cycle	2022	\$4,050
- Access Controls	\$25,000	or		\$25,000	S2 Door Access (Principal Would Like to Add 2 More Doors)	2021	\$2,250
-		or		\$0			
Technology							
- Route / Switch Equipment		or		\$0	Replace - Per 5 Year Cycle		
- UPS		or		\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or		\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or		\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or		\$0	Additional Drops		
- Classroom A/V		or		\$0	Replace - Per 5 Year Cycle		
-		or		\$0			
Facility Improvements Sub Total				\$6,099,028			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$609,903		2022	\$82,337
Survey/Testing	1.5%			\$91,485		2025	\$24,701
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3.0%			\$182,971	Wrestling Mat, Replace 1/2 Student Desks (Flex Type), Science Tables)	2025	\$49,402
Land Purchase				\$0			
Contingency	10%			\$609,903		2025	\$164,674
Support Costs Subtotal				\$1,494,262			
Program Subtotal				\$7,593,290			
Program Escalation				\$1,435,330			\$1,435,330
Program Total				\$9,028,620			



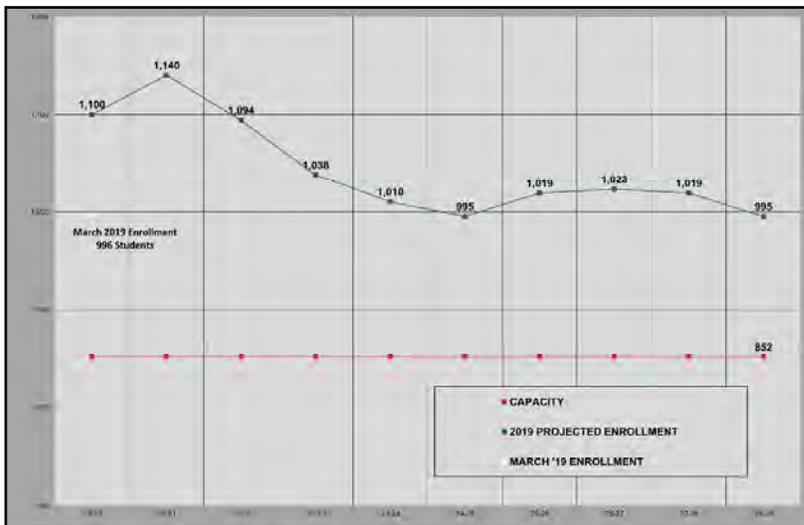
SHERWOOD GITHENS MIDDLE

4800 CHAPEL HILL ROAD

- School #:** 366
- Building Size:** 133,859 Square Feet
- Grade Level:** 6-8
- Year Built:** 1988, '05, '06
- Site Size:** 38.2 Acres

SUMMARY

Githens Middle School is currently over its 852 student capacity by 17% and the enrollment projection shows a peak of 1140 students in 2020 and then reducing to 995 in 2028. Over the next ten years, the FCI rating will go from good to critical if current and deferred maintenance such as a 20 year cycle renovation, address site related issues, mechanical, electrical, and plumbing systems are not addressed.



Current Capacity: 852 Students

Current Enrollment: 966 Students
117%

Projected Enrollment: 995 Students
117%

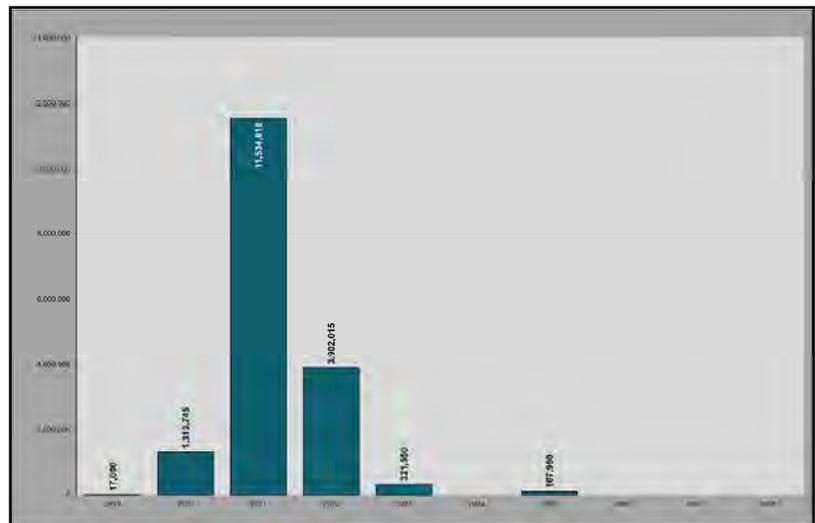
Square Feet per Student: 157.1 sf

Facility Condition Index: .42

New Construction: \$2,228,700

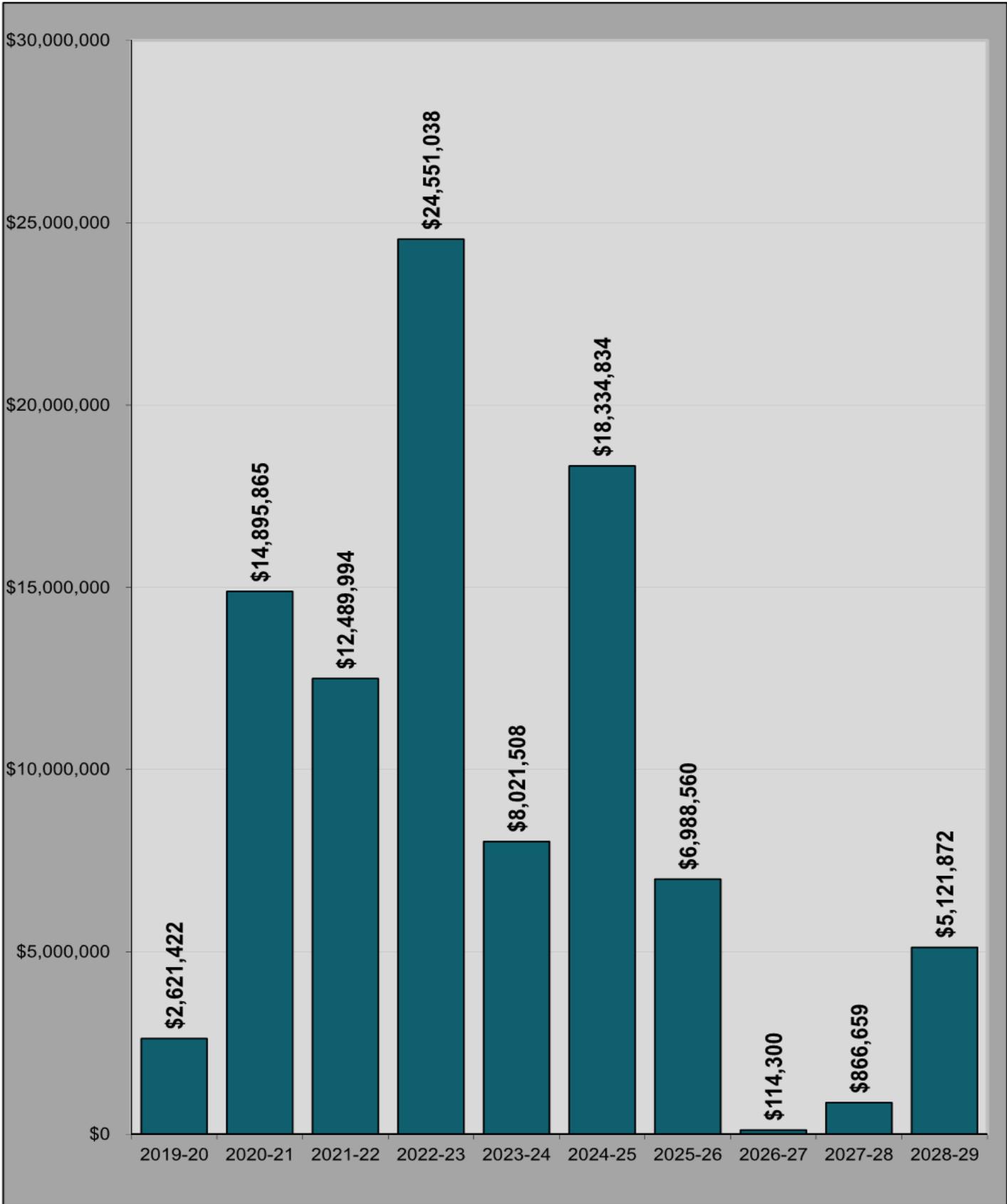
Current / Deferred Maintenance: \$14,968,178

Total Facility Needs: \$17,196,878



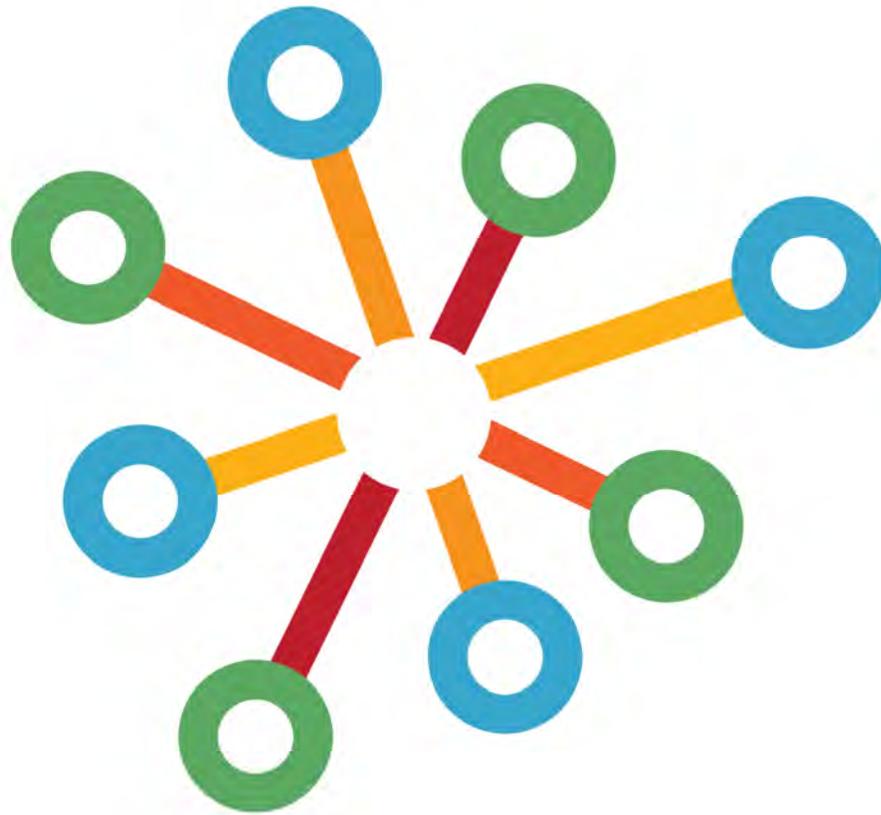
Durham Public Schools Capital Improvement Plan			Githens Middle		995	Summary Sheet	
Category/Description	Campus Program Total		\$ 17,196,878		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A	Facility Improvements:						
	New Construction						
- Addition		or 6,000	\$200.00	\$1,200,000	Currently at 117% Occupancy Level and will increase to 134%		
- Addition		or 2,000	\$150.00	\$300,000	Six (6) Classroom Addition (Or Student Assignment to other MS)	2022	\$162,000
-		or		\$0	New Storage Building for Athletic Fields	2022	\$40,500
	Renovation						
- 20 Year Renovation		or 128,859	\$25.00	\$3,221,475	20 Year Facility Renovation	2021	\$289,933
- 20 Year Renovation		or 5,000		\$0	Restroom Renovations (2015)	2035	\$0
- Theater Arts Renovation	\$300,000	or		\$300,000	A/V, Lights, Rigging	2021	\$27,000
	Site						
- Grading for New Construction	\$115,000	or		\$115,000	Site Prep for Classroom Addition	2022	\$15,525
- Drainage / Erosion	\$15,000	or		\$15,000	Allowance: Correct Courtyard Drainage Issues	2021	\$1,350
- Landscaping / Grassing		or		\$0			
- Irrigation		or 4	\$20,000.00	\$80,000	Irrigation of 4 Athletic Fields	2023	\$14,400
- Athletic Field(s) / Playground(s)		or 2	\$17,500.00	\$35,000	Regrade Baseball & Softball (Football Already Completed)	2023	\$6,300
- Athletic Field(s) / Playground(s)		or 900	\$175.00	\$157,500	Replace Football Field Bleachers	2023	\$28,350
- Athletic / Playground Equipment		or		\$0			
- Parking Lot(s)		or 575	\$18.00	\$10,350	Repave Small Parking Lot at Bus Drive and Adj to Building	2021	\$932
- Driveway(s) / Turn lane(s)		or		\$0			
- Sidewalks	\$10,000	or		\$10,000	Allowance: Address Settlement at Sidewalks and Replace Sidewalks	2019	\$0
- ADA		or		\$0			
- Fencing		or		\$0			
- Site Lighting	\$15,000	or		\$15,000	DPS Owned System, Convert to LED	2021	\$1,350
- Utilities		or		\$0			
-		or		\$0			
	Building Envelope						
- Structural		or		\$0			
- Roof: Low Slope		or		\$0	Low Slope Roof Replaced 2006	2026	\$0
- Roof: Metal		or		\$0	Replace Commons, Classroom Wings, Voc. Ed, Cafeteria Canopies		
- Roof: Shingle		or		\$0			
- Exterior Walls	\$5,000	or		\$5,000	Pressure Wash Exterior	2021	\$450
- Exterior Doors		or 40	\$250.00	\$10,000	Clean and Paint Exterior Doors	2021	\$900
- Storefronts / Window Walls		or		\$0			
- Windows		or		\$0			
	Building Finishes						
- Flooring: VCT / Vinyl		or		\$0			
- Flooring: Hard Tile / Terrazzo		or		\$0			
- Flooring: Sports Flooring		or 2	\$20,000.00	\$40,000	Refinish Gym Floor	2021	\$3,600
- Ceiling: ACT		or		\$0			
- Walls: Painting		or 133,859	\$1.50	\$200,789	Per 7-Year Cycle (Included in 20 Year Renovation)	2021	\$18,071
- Casework		or		\$0			
- Interior Doors / Windows		or		\$0			
- ADA / Code Upgrades		or		\$0			
- Asbestos Abatement		or		\$0			
-		or		\$0			
	Building Systems						
- Food Service	\$250,000	or		\$250,000	Replace Hood, Dish Washer, Cooler / Freezer	2021	\$22,500
- Food Service	\$85,000	or		\$85,000	Refresh Replace Kitchen	2025	\$22,950
- Plumbing	\$3,500	or		\$3,500	Investigation: Plumbing / Sewer issues at Wing beside Cafeteria	2019	\$0
- Plumbing		or 5	\$1,500.00	\$7,500	Replace Water Heaters (5) 50 Gal	2021	\$675
- Fire Sprinkler		or		\$0			
- HVAC		or 133,859	\$4.00	\$535,436	Replace Chillers - Per 12 Year Cycle (2007)	2021	\$48,189
- HVAC		or 133,859	\$2.00	\$267,718	Replace Boilers - Per 20 Year Cycle	2021	\$24,095
- HVAC		or 133,859	\$36.00	\$4,818,924	Replace AHUs	2021	\$433,703
- HVAC		or 133,859		\$0	Replace Controls - Per 20 Year Cycle	2030	\$0
- HVAC		or 6,000	\$75.00	\$450,000	Add HVAC in GYM	2021	\$40,500
- Electrical	\$3,500	or		\$3,500	Investigate Replacing Switchgear and Subpanels	2019	\$0
- Electrical		or		\$0	This Site Has A Generator (Review at Next Update)		
- Fire Alarm		or 133,859	\$2.50	\$334,648	Full System Replacement - Per 20 Year Cycle	2021	\$30,118
- Security: Cameras		or 43	\$1,000.00	\$43,000	Upgrade "Older" I.P Cameras & Server	2021	\$3,870
- Security: Intrusion	\$7,379	or		\$7,379	Head End Replacement - Per 20 Year Cycle	2021	\$664
- Intercom	\$30,000	or		\$30,000	Head End Replacement - Per 20 Year Cycle	2021	\$2,700
- Access Controls	\$20,000	or		\$20,000	S2 Door Access	2021	\$1,800
	Technology						
- Route / Switch Equipment		or		\$0	Replace - Per 5 Year Cycle		
- UPS		or		\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or		\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or		\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or		\$0	Additional Drops		
- Classroom A/V		or		\$0	Replace - Per 5 Year Cycle		
-		or		\$0			
	Facility Improvements Sub Total			\$12,571,718			
	II B Support Costs						
Prof/Pm/Support Fees	10%			\$1,257,172		2020	\$56,573
Survey/Testing	1.5%			\$188,576		2022	\$25,458
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3.0%			\$377,152	Allowance - Refresh & Wrestling Mat	2022	\$50,915
Land Purchase				\$0			
Contingency	10%			\$1,257,172		2022	\$169,718
	Support Costs Subtotal			\$3,080,071			
	Program Subtotal			\$15,651,789			
	Program Escalation			\$1,545,089			\$1,545,089
	Program Total			\$17,196,878			

MIDDLE SCHOOL CONSTRUCTION COST



\$94,006,052

HIGH SCHOOL SUMMARY SHEETS



DURHAM
PUBLIC SCHOOLS



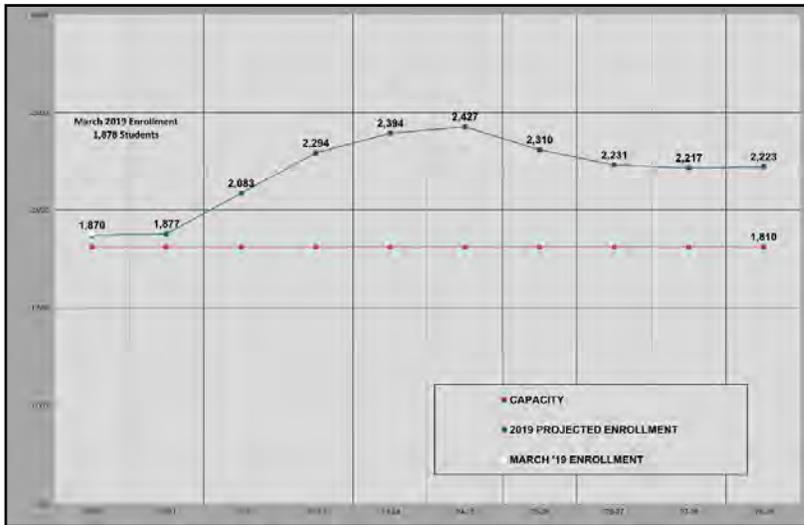
C.E. JORDAN HIGH SCHOOL

6806 GARRETT ROAD

School #: 312
Building Size: 266,477 Square Feet
Grade Level: 9-12
Year Built: 1963, '79, '80, '91, '94, '08
Site Size: 55.7 Acres

SUMMARY

Jordan High School was built in 1963, had additions / renovations in 1979, 1980, 1991, 1994, and most recently in 2018. The current student capacity is 1,810 students and enrollment is 1878 as of March 2019, which is 4% over capacity. It is expected that the enrollment will dip slightly over the next two years before increasing to 2,394 in 2023, then falling off slightly to 2,223 in 2028. To handle this overcapacity condition, DPS should plan on a classroom addition or redistricting of the attendance zone. The FCI for the facility will be critical in 2022 which is due to the large amount of deferred, current, and projected maintenance associated with a 20 year cycle renovation, sitework improvements, roofing, as well as mechanical, electrical, and plumbing system upgrades, all within the next ten years.



Current Capacity: 1,810 Students

Current Enrollment: 1,878 Students
104%

Projected Enrollment: 2,223 Students
123%

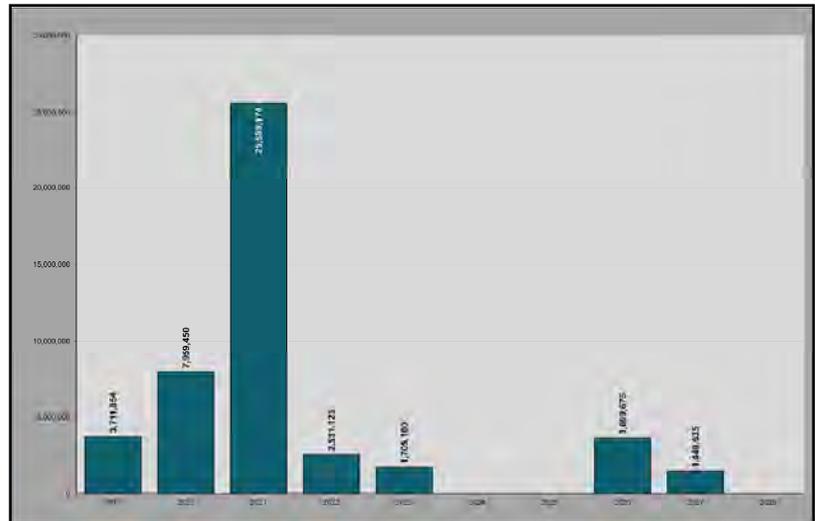
Square Feet per Student: 147.2 sf

Facility Condition Index: .57

New Construction: \$4,825,575

Current / Deferred Maintenance: \$41,730,435

Total Facility Needs: \$46,556,010



Durham Public Schools			Jordan High School		1902	Summary Sheet	
Capital Improvement Plan			46,556,010				
Category/Description	Campus Program Total		Cost/Unit	Cost Estimate	Comments	Year Required	Escalation
	Lump Sum	Unit					
I A Facility Improvements:							
New Construction							
					Currently at 104% Occupancy Level but will increase to 132%		
- Addition	or	8,000	\$200.00	\$1,600,000	Eight (8) Classroom Addition	2026	\$504,000
- Addition	or	3,000	\$200.00	\$600,000	New Fieldhouse for Athletic Fields	2026	\$189,000
- Addition	or	1,650	\$200.00	\$330,000	Band / Theater Storage at Band Addition	2026	\$103,950
- Addition	or	\$100,000		\$100,000	Secure Connectors between main Building & Three Wings	2026	\$31,500
- Canopies	or	7,000	\$55.00	\$385,000	At Student Drop Off (Round A Bout Area)	2020	\$17,325
- Dumpster Pad / Enclosure	or	\$35,000		\$35,000	Allowance: Not Enough Room For Dumpsters / Expand	2021	\$3,150
-	or			\$0			
Renovation							
- 20 Year Renovation	or	2,000		\$0	Renovations (Four (4) Restrooms / Front Office) (2018)		
- 20 Year Renovation	or	3,000	\$158.00	\$474,000	Renovate 3 Science Labs	2021	\$42,660
- Major Renovation	or	251,477	\$50.00	\$12,573,650	20 Year Cyclical Renovation (1963, 79, 80, 91, 94)	2021	\$1,131,647
- Major Renovation	or	13,000	\$50.00	\$650,000	20 Year Cyclical Renovation of Auditorium	2021	\$58,500
- Theater Arts Renovation	or	\$550,000		\$550,000	A/V, Lights, Rigging	2021	\$49,500
Site							
- Grading for New Construction	or	\$115,000		\$115,000	Site Prep for Addition	2026	\$36,225
- Drainage / Erosion	or	\$5,000		\$5,000	Investigate Drainage Issue Under Building...Standing Water (From HVAC Condensation)	2019	\$0
- Drainage / Erosion	or	\$10,000		\$10,000	Water Under Doors at Small Gym	2019	\$0
- Landscaping / Grassing	or	\$10,000		\$10,000	Landscape Refresh	2023	\$1,800
- Irrigation	or	2	\$10,000.00	\$20,000	Replace Irrigation at Baseball & Softball	2020	\$900
- Athletic Field(s) / Playground(s)	or	8	\$10,000.00	\$80,000	Preventative Maintenance on Tennis Courts - Per 10 Year Cycle (2013)	2023	\$14,400
- Athletic Field(s) / Playground(s)	or	\$200,000		\$200,000	Expand Track from 6 Lanes to 8 Lanes / Resurface	2023	\$36,000
- Athletic Field(s) / Playground(s)	or	3,400	\$150.00	\$510,000	Refresh Football Field Bleachers	2023	\$91,800
- Athletic Field(s) / Playground(s)	or	4	\$150,000.00	\$600,000	Replace Athletic Field Lights to LED (Football / Baseball / Softball)	2023	\$108,000
- Athletic Field(s) / Playground(s)	or	1	\$300,000.00	\$300,000	Add LED Athletic Field Lights to Tennis (to be completed in 2019)	2019	\$0
- Athletic Field(s) / Playground(s)	or	2	\$20,000.00	\$40,000	Regrade Baseball & Softball	2020	\$1,800
- Athletic Field(s) / Playground(s)	or	\$45,000		\$45,000	Replace PA System	2023	\$8,100
- Parking Lot(s)	or	5,750	\$18.00	\$103,500	Allowance: Resurface Student, Staff, and Rear Parking Lots	2020	\$4,658
- Driveway(s) / Turn lane(s)	or			\$0	Resurface Service Drive at Back of School (2019)		
- Sidewalks	or	\$15,000		\$15,000	Allowance: Repair Sidewalk at Left of Facility, next to Baseball	2020	\$675
- ADA	or	\$10,000		\$10,000	Remove Stairs and Add Ramp Between Main and 300 Buildings	2020	\$450
- Site Lighting	or			\$0	Duke Energy Owned System		
- Site Lighting	or	\$25,000		\$25,000	Improve Exterior Signage	2020	\$1,125
-	or			\$0			
Building Envelope							
- Roof: Low Slope	or	\$16,819		\$16,819	Roof Replacement of Admin Area	2022	\$2,271
- Roof: Low Slope	or			\$0	Roof Replacement of Gym (2018)	2038	\$0
- Roof: Low Slope	or	\$2,091,943		\$2,091,943	Roof Replacement of S/NW/SW/SE Wings, Cafeteria, Media Center, Aud.	2022	\$282,412
- Roof: Metal	or	\$121,302		\$121,302	Roof Replacement of Canopies (All)	2022	\$16,376
-	or			\$0			
Building Finishes							
- Walls: Painting	or	266,477	\$1.50	\$399,716	Per 7 Year Cycle (Included in Renovation)	2021	\$35,974
- Signage	or	\$25,000		\$25,000	Replace Interior Signage and Include Brail	2020	\$1,125
- Asbestos Abatement	or	\$175,000		\$175,000	Replace Asbestos Flooring (Excluding Auditorium)	2020	\$7,875
- Asbestos Abatement	or	266,477	\$1.40	\$373,068	Pre 1989 CMU Walls	2020	\$16,788
- Other	or	300	\$225.00	\$67,500	Replace Bleachers in Small Gym	2020	\$3,038
Building Systems							
- Food Service	or			\$0	Replace Cooler / Freezer (2018)	2038	\$0
- Food Service	or			\$0	Replace Hood, Dish Washer, Kitchen Equipment	2029	\$0
- Plumbing	or	1	\$35,000.00	\$35,000	Replace Water Heater Flat Coil at Kitchen (250 Gal System)	2020	\$1,575
- Plumbing	or	\$50,000		\$50,000	Replace Water Distribution System at Mechanical Room / Basement	2020	\$2,250
- HVAC	or	266,477	\$4.00	\$1,065,908	Chiller Replacement Per 12 Year Cycle (2009, 2015)	2027	\$383,727
- HVAC	or	266,477	\$2.00	\$532,954	Replace Boiler (3) - Per 20 Year Cycle	2021	\$47,966
- HVAC	or	266,477	\$28.00	\$7,461,356	Replace AHUs, Additional Individual Units / Add Second Loop	2021	\$671,522
- HVAC	or	266,477	\$3.00	\$799,431	Replace Controls - Per 20 Year Cycle	2021	\$71,949
- Electrical	or	259,000	\$1.50	\$388,500	Replace T8s to LED	2020	\$17,483
- Electrical	or	\$50,000		\$50,000	Replace Switchgear, Sub Panels (Included in Renovation)	2020	\$2,250
- Electrical	or			\$0	This Site Has A Generator		
- Fire Alarm	or	266,477	\$2.50	\$666,193	Full System Replacement - Per 20 Year Cycle	2020	\$29,979
- Security: Cameras	or	\$72,500		\$72,500	Full System Replacement - Per 6 Year Cycle (Replaced 2013)	2020	\$3,263
- Security: Intrusion	or	\$55,000		\$55,000	Head End Replacement - Per 20 Year Cycle	2020	\$2,475
- Intercom	or	\$60,000		\$60,000	Head End Replacement - Per 20 Year Cycle	2020	\$2,700
- Access Controls	or	\$75,000		\$75,000	Full System Replacement - Per 15 Year Cycle	2020	\$3,375
Technology							
- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle		
- UPS	or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks	or			\$0	Additional Drops		
- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle		
-	or			\$0			
Facility Improvements Sub Total				\$33,968,539			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$3,396,854		2019	\$0
Survey/Testing	1.5%			\$509,528		2020	\$22,929
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3.0%			\$1,019,056	Furniture Refresh, Wrestling Mats, Weight Room Equipment, Hurdles, High Jump, Etc.	2020	\$45,858
Land Purchase				\$0			
Contingency	10%			\$3,396,854		2020	\$152,858
Support Costs Subtotal				\$8,322,292			
Program Subtotal				\$42,290,831			
Program Escalation				\$4,265,180			\$4,265,180
Program Total				\$46,556,010			



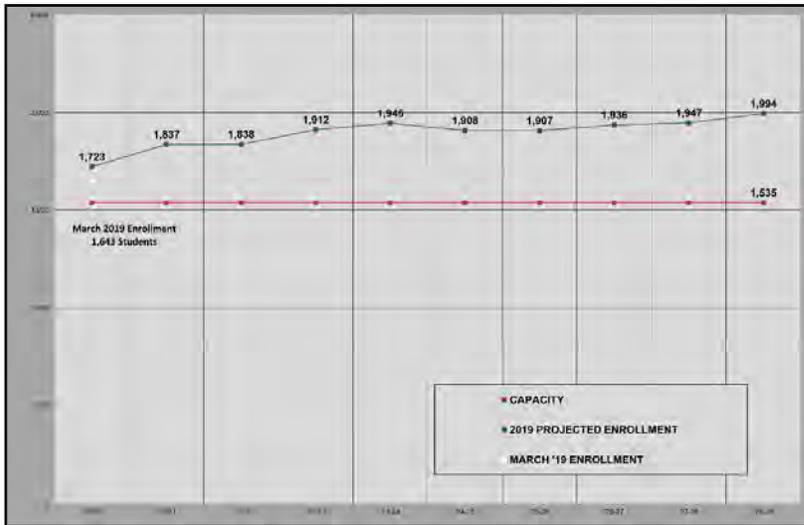
HILLSIDE HIGH SCHOOL

3727 FAYETTEVILLE STREET

- School #:** 325
- Building Size:** 299,943 Square Feet
- Grade Level:** 9-12
- Year Built:** 1995, '05, '09, '10
- Site Size:** 63.0 Acres

SUMMARY

Hillside High School has a student capacity of 1535 but a 2018 / 19 student enrollment of 1671. This over capacity trend is expected to continue through 2028 when the student population is expected to be 1994. Currently, mobile units are being employed to handle the excess enrollment but the District should consider replacing the temporary structures with a classroom addition in order to better secure the campus. Also, an alternate method to address overcrowding without a classroom addition would be to relocate the 329 students that attend New Tech from the Hillside campus to a stand alone facility. The facility will require a significant amount of maintenance over the next ten years, inclusive of a 20 year cycle renovation, sitework improvements, roofing, food service, and mechanical, electrical, and plumbing system upgrades.



Current Capacity: 1,535 Students

Current Enrollment: 1,314 Students
86%

Projected Enrollment: 1,994 Students
130%

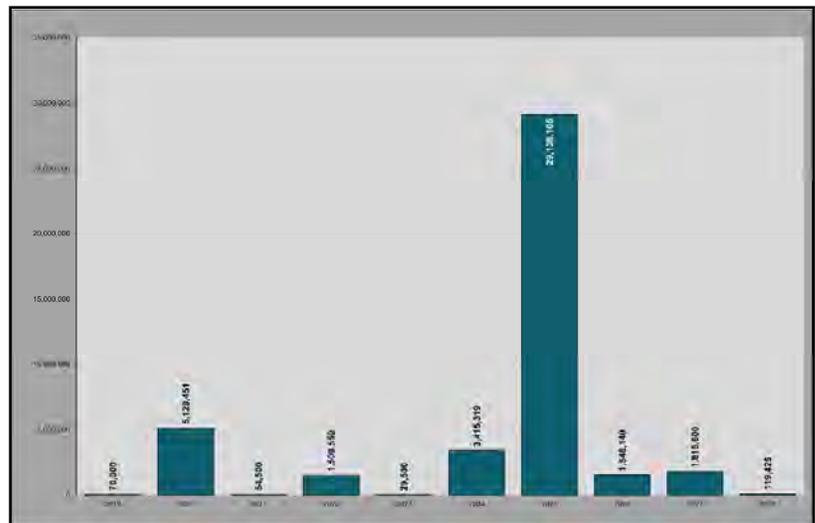
Square Feet per Student: 195.4 sf

Facility Condition Index: .37

New Construction: \$7,962,150

Current / Deferred Maintenance: \$34,865,501

Total Facility Needs: \$42,827,651



Durham Public Schools Capital Improvement Plan		Hillside High School			1671	Summary Sheet	
Category/Description	Campus Program Total		\$ 42,827,651		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction					Currently at 109% Occupancy Level but will increase to 130%		
- Addition		or 20,000	\$200.00	\$4,000,000	Twenty (20) Classroom Addition	2025	\$1,080,000
- Addition		or 3,000	\$200.00	\$600,000	New Fieldhouse for Athletic Fields	2022	\$81,000
- Addition	\$50,000	or		\$50,000	Exterior Covered Seating at Cafeteria	2021	\$4,500
- Addition		or 2,500	\$200.00	\$500,000	Permanent Building for Transportation Office / Maint. at Bus Lot	2022	\$67,500
Renovation							
- Auditorium Control Room		or 200	\$150.00	\$30,000	Add Auditorium Control Room	2020	\$1,350
- 20 Year Renovation		or 299,943	\$25.00	\$7,498,575	20 Year Renovation of Entire Facility	2025	\$2,024,615
- 20 Year Renovation		or		\$0	Weight Room, Locker Rooms (3), Security Vest (2018)	2038	\$0
- 20 Year Renovation	\$5,000	or		\$5,000	Add Film Platform at Gym	2020	\$225
- 20 Year Renovation	\$5,000	or		\$5,000	Walk In Trophy Case	2025	\$1,350
- 20 Year Renovation		or 3,000	\$158.00	\$474,000	Renovation 3 Science Labs	2025	\$127,980
- Theater Arts Renovation	\$800,000	or		\$800,000	A/V, Lights, Rigging	2020	\$36,000
Site							
- Grading for New Construction		or 2	\$115,000.00	\$230,000	Site Prep for Classroom Addition & For New Transportation Office	2022	\$31,050
- Drainage / Erosion	\$25,000	or		\$25,000	Allowance - Baseball Field Drainage Repairs	2020	\$1,125
- Landscaping / Grassing	\$10,000	or		\$10,000	Landscape Refresh	2025	\$2,700
- Irrigation		or 5	\$20,000.00	\$100,000	Irrigate 5 Athletic Fields	2025	\$27,000
- Athletic Field(s) / Playground(s)	\$75,000	or		\$75,000	Resurface Track - 10 Year Cycle (2017)	2027	\$27,000
- Athletic Field(s) / Playground(s)		or 3,400	\$150.00	\$510,000	Refresh Football Field Bleachers	2027	\$183,600
- Athletic Field(s) / Playground(s)		or 6	\$125,000.00	\$750,000	Replace Athletic Field Lights to LED (Tennis / Football / Baseball / Softball)	2027	\$270,000
- Athletic Field(s) / Playground(s)		or 5	\$17,500.00	\$87,500	Regrade Baseball & Softball	2025	\$23,625
- Athletic Field(s) / Playground(s)	\$45,000	or		\$45,000	Replace PA System	2020	\$2,025
- Athletic Field(s) / Playground(s)		or 200	\$175.00	\$35,000	Add Bleachers at Tennis and Soccer	2020	\$1,575
- Athletic Field(s) / Playground(s)	\$15,000	or		\$15,000	Add Pole Vault System	2020	\$675
- Parking Lot(s)		or 12,000	\$18.00	\$216,000	Repave Student & Staff Parking Lot	2020	\$9,720
- Parking Lot(s)	\$25,000	or		\$25,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2020	\$1,125
- Bus Parking Lot(s)		or 12,000	\$18.00	\$216,000	Repave Bus Parking Lot	2020	\$9,720
- Sidewalks	\$10,000	or		\$10,000	Allowance: Replace Sidewalk at Left of Entrance	2020	\$460
- Fencing		or 400	\$24.00	\$9,600	Wooded area at Front Parking Lot and Front of Campus	2020	\$432
- Site Lighting	\$20,000	or		\$20,000	Upgrade Bus Parking Site Lighting	2020	\$900
- Utilities	\$40,000	or		\$40,000	DPS Owned System, Convert to LED	2025	\$10,800
Building Envelope							
- Structural	\$5,000	or		\$5,000	Investigate How To Correct Floor Settlement	2019	\$0
- Roof: Low Slope	\$3,446,966	or		\$3,446,966	Roof Replacement of all sections. Per 20 Year Cycle	2020	\$155,113
Building Finishes							
- Walls: Painting		or 293,943	\$1.50	\$440,915	Per 7-Year Cycle	2025	\$119,047
- Interior Doors / Windows	\$35,000	or		\$35,000	Allowance: Replace Large Colling Door at Auditorium	2025	\$9,450
- ADA / Code Upgrades		or		\$0			
- Other		or 1,500		\$0	Replace Gym Bleachers (2019)	2019	\$0
Building Systems							
- Food Service	\$250,000	or		\$250,000	Replace Hood & Cooler / Freezer	2025	\$67,500
- Food Service	\$85,000	or		\$85,000	Refresh Kitchen Equipment	2028	\$34,425
- Plumbing		or 2	\$12,500.00	\$25,000	Replace Water Heaters (2) 150 Gal	2023	\$4,500
- Plumbing		or 20	\$500.00	\$10,000	Replace Hose Bibs	2020	\$450
- Fire Sprinkler		or		\$0			
- HVAC		or 293,943	\$4.00	\$1,175,772	Replace Chillers - Per 12 Year Cycle (2) (2014)	2026	\$370,368
- HVAC		or 293,943	\$2.00	\$587,886	Replace Boilers (2) - Per 20 Year Cycle	2025	\$158,729
- HVAC		or 293,943	\$14.00	\$4,115,202	Replace AHUs	2025	\$1,111,105
- HVAC		or 293,943		\$0	Replace Controls - Per 20 Year Cycle (2016)	2036	\$0
- HVAC		or 6,000	\$25.00	\$150,000	Add AC at Main and Small Gyms	2025	\$40,500
- Electrical	\$200,000	or		\$200,000	Replace Stage Lighting (Including Dimmer System)	2025	\$54,000
- Electrical		or		\$0	This Site Has A Generator		
- Fire Alarm		or 293,943	\$2.00	\$587,886	Full System Replacement - Per 20 Year Cycle	2025	\$158,729
- Security: Cameras	\$35,000	or		\$35,000	System at Bus Parking Lot	2019	\$0
- Security: Cameras		or 14	\$1,000.00	\$14,000	Upgrade Existing "Older" I.P. Cameras	2025	\$3,780
- Security: Intrusion	\$55,000	or		\$55,000	Head End Replacement - Per 20 Year Cycle	2025	\$14,850
- Intercom		or 293,943	\$0.85	\$249,852	Full System Replacement - Per 20 Year Cycle	2025	\$67,460
- Access Controls	\$30,000	or		\$30,000	S2 Door Access	2019	\$0
Technology							
- Route / Switch Equipment		or		\$0	Replace - Per 5 Year Cycle		
- UPS		or		\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or		\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or		\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or		\$0	Additional Drops		
- Classroom A/V		or		\$0	Replace - Per 5 Year Cycle		
Facility Improvements Sub Total				\$27,880,153			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$2,788,015		2024	\$627,303
Survey/Testing	1.5%			\$418,202		2025	\$112,915
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3.0%			\$836,405	Wrestling Mats, Weight Room Equipment, Hurdles, High Jump, Etc.	2025	\$225,829
Land Purchase				\$0			
Contingency	10%			\$2,788,015		2025	\$752,764
Support Costs Subtotal				\$6,830,637			
Program Subtotal				\$34,710,791			
Program Escalation				\$8,116,860			\$8,116,860
Program Total				\$42,827,651			



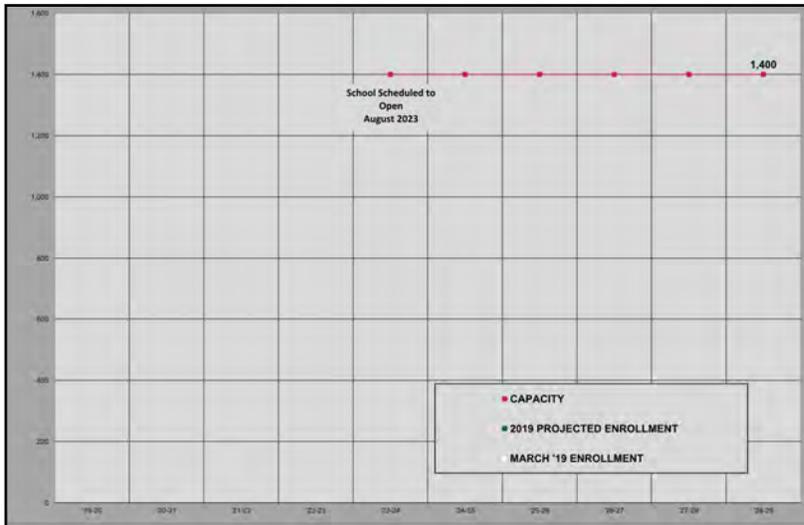
NEW HS - NORTHERN DISTRICT

TBD

- School #:** TBD
- Building Size:** 254,000 Square Feet
- Grade Level:** 9-12
- Year Built:** 2023
- Site Size:** 57.1 Acres

SUMMARY

The new High School, partially funded with \$51,250,000 through the 2016 bond is currently in design which is planned to replace Northern High School. The facility, pending fund availability, is scheduled to ready for student occupancy in 2023, will be approximately 254,000 square feet, and will have a capacity for 1400 students.



Current Capacity: 1,400 Students

Current Enrollment: TBD Students
TBD%

Projected Enrollment: TBD Students
TBD%

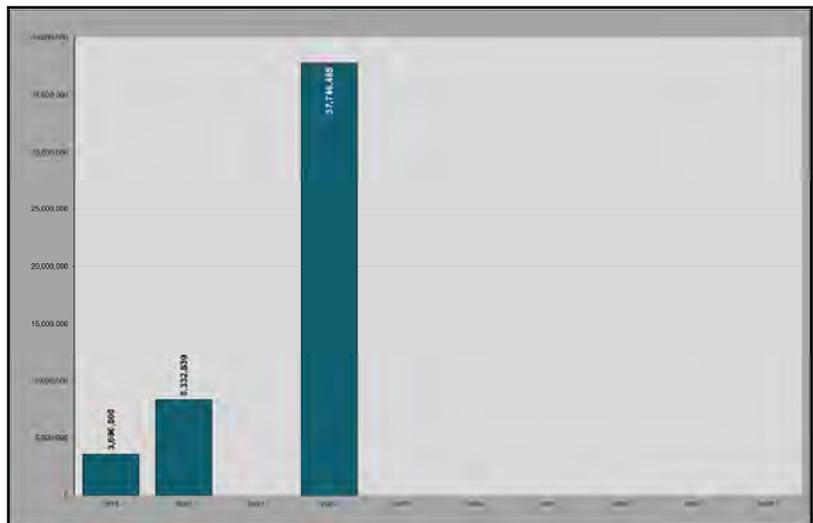
Square Feet per Student: 181.4 sf
(At 100% Capacity)

Facility Condition Index: N/A

New Construction: \$49,679,315

Current / Deferred Maintenance: \$0

Total Facility Needs: \$49,679,315



Durham Public Schools Capital Improvement Plan			Replacement HS - Northern Dist.		TBD	Summary Sheet	
Category/Description	Campus Program Total		\$ 49,679,315		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction							
- New Construction		or 254,000	\$200.00	\$50,800,000	New 1400 Student Facility at 182 sf / Student (\$190 of being carried SF)	2022	\$6,858,000
-		or		\$0			
Renovation							
-		or		\$0			
Site							
- Grading for New Construction		or 60	\$175,000.00	\$10,500,000		2022	\$1,417,500
- Drainage / Erosion	\$100,000	or		\$100,000	25 Year Event vs 10 Year Event	2022	\$13,500
- Landscaping / Grassing	\$100,000	or		\$100,000		2022	\$13,500
- Irrigation	\$50,000	or 8		\$50,000		2022	\$6,750
- Athletic Field(s) / Playground(s)		or 1	\$50,000.00	\$50,000	Football / Soccer Field	2022	\$6,750
- Athletic Field(s) / Playground(s)		or 1	\$25,000.00	\$25,000	Baseball Field	2022	\$3,375
- Athletic Field(s) / Playground(s)		or 1	\$25,000.00	\$25,000	Softball Field	2022	\$3,375
- Athletic Field(s) / Playground(s)		or 1	\$50,000.00	\$50,000	Band Field	2022	\$6,750
- Athletic Field(s) / Playground(s)		or 1	\$50,000.00	\$50,000	Practice / Multi-Purpose Fields	2022	\$6,750
- Athletic Field(s) / Playground(s)		or 6	\$100,000.00	\$600,000	Tennis Courts	2022	\$81,000
- Athletic Field(s) / Playground(s)	\$500,000	or		\$500,000	8 Lane Track	2022	\$67,500
- Athletic Field(s) / Playground(s)		or 6	\$150,000.00	\$900,000	Light 5 Athletic Fields & Tennis	2022	\$121,500
- Athletic / Playground Equipment	\$50,000	or		\$50,000	Misc. Athletic Equipment	2022	\$6,750
- Parking Lot(s)		or		\$0			
- Driveway(s) / Turn lane(s)	\$750,000	or		\$750,000	Offsite Turn lanes	2022	\$101,250
- Sidewalks		or		\$0			
- ADA		or		\$0			
- Fencing	\$100,000	or		\$100,000		2022	\$13,500
- Site Lighting		or		\$0			
- Utilities	\$250,000	or		\$250,000	Offsite Utilities	2022	\$33,750
-		or		\$0			
Building Envelope							
- Structural		or		\$0			
- Roof: Low Slope		or		\$0			
- Roof: Metal		or		\$0			
- Roof: Shingle		or		\$0			
- Exterior Walls		or		\$0			
- Exterior Doors		or		\$0			
- Storefronts / Window Walls		or		\$0			
- Windows		or		\$0			
-		or		\$0			
Building Finishes							
- Flooring: VCT / Vinyl		or		\$0			
- Flooring: Hard Tile / Terrazzo		or		\$0			
- Flooring: Sports Flooring		or		\$0			
- Ceiling: ACT		or		\$0			
- Ceiling: Other		or		\$0			
- Walls: Painting		or		\$0			
- Walls: Other		or		\$0			
- Casework		or		\$0			
- Interior Doors / Windows		or		\$0			
- ADA / Code Upgrades		or		\$0			
- Asbestos Abatement		or		\$0			
-		or		\$0			
Building Systems							
- Food Service		or		\$0			
- Plumbing		or		\$0			
- Fire Sprinkler		or		\$0			
- HVAC		or		\$0			
- Electrical		or		\$0			
- Fire Alarm		or		\$0			
- Security: Cameras	\$150,000	or		\$150,000		2022	\$20,250
- Security: Intrusion		or		\$0			
- Intercom		or		\$0			
- Access Controls	\$100,000	or		\$100,000		2022	\$13,500
-		or		\$0			
Technology	\$1,300,000	or		\$1,300,000	Limited Technology Included	2022	\$175,500
- Route / Switch Equipment		or		\$0	Replace - Per 5 Year Cycle		
- UPS		or		\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or		\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or		\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or		\$0	Additional Drops		
- Classroom A/V		or		\$0	Replace - Per 5 Year Cycle		
-		or		\$0			
Facility Improvements Sub Total				\$66,450,000			
II B Support Costs							
Prof/Pm/Support Fees	7%			\$4,651,500		2020	\$209,318
CM@R - GCs, Contingency	5%			\$3,322,500	Typically CM@R is +/- 5% to 10% Premium over Hard Bid	2020	\$149,513
Survey/Testing	1.50%			\$996,750		2022	\$134,561
Storage and Moving				\$0			
City Fees/County	0.5%			\$332,250	Building Permit	2022	\$44,854
FF&E	6.00%			\$3,987,000	Low FF& E Amount	2022	\$538,245
Land Purchase	\$3,600,000	or		\$3,600,000		2019	\$0
Contingency	10%			\$6,645,000	5% being carried	2022	\$897,075
Support Costs Subtotal				\$23,535,000			
Program Subtotal				\$89,985,000			
Funds from 2016 Bond	-\$51,250,000			-\$51,250,000	Funds already in Place From Previous Bond	2022	
Program Escalation				\$10,944,315			\$10,944,315
Program Total				\$49,679,315			



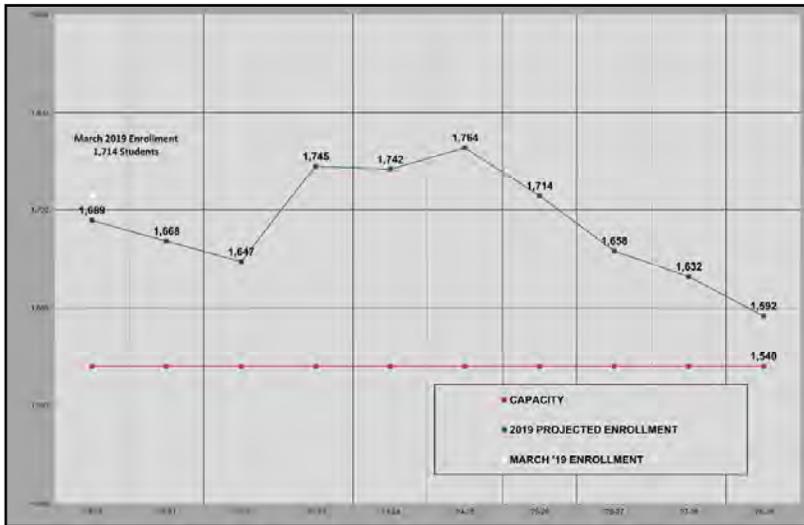
RIVERSIDE HIGH SCHOOL

3218 ROSE OF SHARON ROAD

- School #:** 365
- Building Size:** 282,845 Square Feet
- Grade Level:** 9-12
- Year Built:** 1991, '92
- Site Size:** 63.2 Acres

SUMMARY

Built in 1991 and expanded in 1992, Riverside High School has a student capacity of 1,540 students but an enrolment of 1,714 as of March, indicating an overcapacity condition. The enrollment is expected to peak in 2023 with 1,745 students before declining to 1,592 in 2028. Therefore it is recommended that the District plan a classroom addition only large enough to house the 2028 enrollment and use short term methods such as mobile units to house the near term overcrowding. The facility had roofing addressed in 2018 and 2019 but the FCI remains at a poor level due to the projected maintenance needs over the next ten years that includes typical items such as a 20 year cycle renovation, site improvements, repair of a structural issue related to a veneer wall, replacement of food service equipment, and mechanical, electrical, and plumbing system upgrades.



Current Capacity: 1,540 Students

Current Enrollment: 1,714 Students
111%

Projected Enrollment: 1,592 Students
103%

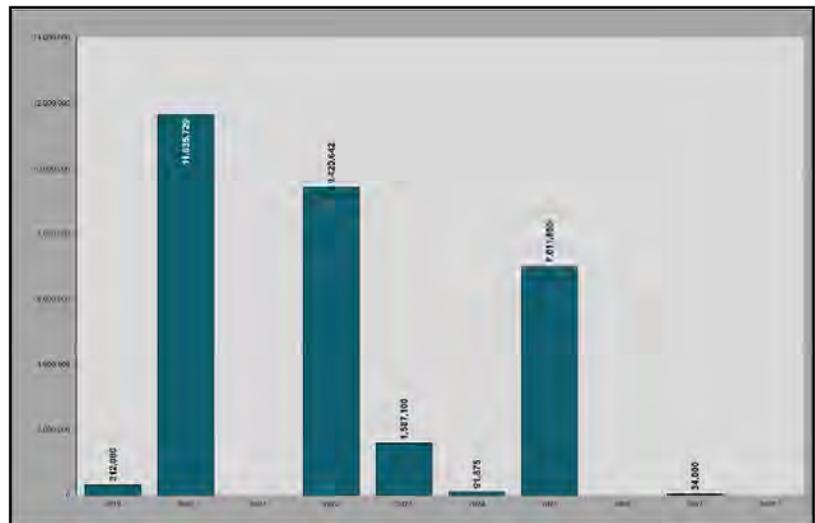
Square Feet per Student: 183.7 sf

Facility Condition Index: .35

New Construction: \$3,507,225

Current / Deferred Maintenance: \$26,585,976

Total Facility Needs: \$30,093,201



Durham Public Schools Capital Improvement Plan			Riverside High School		1734	Summary Sheet	
Category/Description	Campus Program Total		\$ 30,093,201		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction					Currently at 111% Occupancy Level will decrease to 104%		
- Addition		or 8,000	\$200.00	\$1,600,000	Eight (8) Classroom Addition	2025	\$432,000
- Addition		or 3,000	\$200.00	\$600,000	New Fieldhouse for Athletic Fields	2025	\$162,000
-		or		\$0			
Renovation							
- 20 Year Renovation		or 282,845	\$25.00	\$7,071,125	20-Year Cycle Renovation	2022	\$954,602
- 20 Year Renovation		or		\$0	Locker Rooms, Weight Room, Security Vest (2018)	2038	\$0
- 20 Year Renovation		or 3,000	\$158.00	\$474,000	Renovate 3 Science Labs	2022	\$63,900
- Theater Arts Renovation	\$675,000	or		\$675,000	A/V, Lights, Rigging	2022	\$91,125
Site							
- Grading for New Construction	\$115,000	or		\$115,000	Site Prep for Additions (w/ Storm Sewer & Erosion Control)	2025	\$31,050
- Drainage / Erosion		or 4	\$17,500.00	\$70,000	Regrade Football and Practice Fields	2020	\$3,150
- Drainage / Erosion	\$50,000	or		\$50,000	Standing Water Between Buildings	2020	\$2,250
- Landscaping / Grassing	\$10,000	or		\$10,000	Landscape Refresh	2025	\$2,700
- Irrigation		or 4	\$20,000.00	\$80,000	Irrigate 4 Athletic Fields	2022	\$10,800
- Athletic Field(s) / Playground(s)		or 8	\$10,000.00	\$80,000	Tennis Court Paving / Resurfacing (2013)	2023	\$14,400
- Athletic Field(s) / Playground(s)	\$75,000	or		\$75,000	Resurface Track	2023	\$13,500
- Athletic Field(s) / Playground(s)		or 3,400	\$150.00	\$510,000	Refresh Football Field Bleachers	2023	\$91,800
- Athletic Field(s) / Playground(s)		or 4	\$150,000.00	\$600,000	Replace Athletic Field Lights to LED (Tennis / Football / Baseball / Softball)	2023	\$108,000
- Athletic Field(s) / Playground(s)		or 2	\$17,500.00	\$35,000	Regrade Baseball & Softball	2023	\$6,300
- Athletic Field(s) / Playground(s)	\$45,000	or		\$45,000	Replace PA System	2023	\$8,100
- Athletic / Playground Equipment		or 4	\$10,000.00	\$40,000	Replace Baseball & Softball Dugouts	2020	\$1,800
- Parking Lot(s)	\$25,000	or		\$25,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2019	\$0
- Driveway(s) / Turn lane(s)	\$10,000	or		\$10,000	Repair Concrete / Asphalt At Dumpster Pad	2019	\$0
- Fencing		or 650	\$24.00	\$15,600	Add Fencing Adj to Tennis Court / Neighborhood	2020	\$702
- Site Lighting	\$25,000	or		\$25,000	DPS Owned System, Convert to LED	2027	\$9,000
-		or		\$0			
Building Envelope							
- Structural	\$10,000	or		\$10,000	Investigate Settlement Issues at Gym	2019	\$0
- Roof: Low Slope		or		\$0	Roof Replacement of G1, H1, H2 (PVC) (2018)	2038	\$0
- Roof: Low Slope		or		\$0	Roof Replacement of A, B1, C, E, F, & F2 (2019)	2038	\$0
- Roof: Metal	\$130,640	or		\$130,640	Recoat Roof of Canopies	2020	\$5,879
- Roof: Shingle	\$36,729	or		\$36,729	Roof Replacement of Ticket Booth, Bathrooms, & Press Box	2020	\$1,653
- Exterior Walls	\$227,000	or		\$227,000	Repair Exterior Brick Walls Per 2018 Study	2019	\$0
- Exterior Walls	\$50,000	or		\$50,000	Pressure Wash / Paint	2020	\$2,250
- Windows	\$45,000	or		\$45,000	Replace Cafeteria Windows	2020	\$2,025
- Caulking	\$75,000	or		\$75,000	Recaulk Tilt up Joints - Global	2020	\$3,375
-		or		\$0			
Building Finishes							
- Flooring: VCT / Vinyl		or		\$0			
- Walls: Painting		or 282,845	\$1.50	\$424,268	Per 7 Year Cycle (Included in Renovation)	2020	\$19,092
- Casework		or		\$0			
- ADA / Code Upgrades		or		\$0			
- Asbestos Abatement		or		\$0			
-		or		\$0			
Building Systems							
- Food Service	\$250,000	or		\$250,000	Replace Hood, Dish Washer, Cooler / Freezer	2020	\$11,250
- Food Service	\$85,000	or		\$85,000	Refresh Kitchen Equipment	2025	\$22,950
- Plumbing		or		\$0	Replace Water Heaters (3) 100 Gal - E; (2) 100 Gal - G (2016)	2031	\$0
- Plumbing		or 20	\$500.00	\$10,000	Replace Hose Bibs	2024	\$2,250
- Fire Sprinkler		or		\$0			
- HVAC		or 282,845	\$4.00	\$1,131,380	Replace Chiller Per 12 Year Cycle (2) (2009)	2020	\$50,912
- HVAC		or 282,845	\$2.00	\$565,690	Replace Boilers (2) - Per 20 Year Cycle (1991)	2020	\$25,456
- HVAC		or 282,845	\$14.00	\$3,959,830	Replace AHUs	2020	\$178,192
- HVAC		or 282,845	\$3.00	\$848,535	Replace Controls - Per 20 Year Cycle	2020	\$38,184
- Electrical		or 282,845	\$1.50	\$424,268	Replace T8s to LED	2020	\$19,092
- Electrical		or		\$0	This Site Has A Generator		
- Elevators	\$50,000	or		\$50,000	Install an Additional Elevator	2020	\$2,250
- Fire Alarm		or 282,845	\$2.50	\$707,113	Full System Replacement - Per 20 Year Cycle	2020	\$31,820
- Security: Cameras		or 65	\$1,000.00	\$65,000	Upgrade Existing "Older" I.P. Camera & Server	2024	\$14,625
- Security: Intrusion	\$55,000	or		\$55,000	Head End Replacement - Per 20 Year Cycle	2020	\$2,475
- Intercom	\$60,000	or		\$60,000	Head End Replacement - Per 20 Year Cycle	2020	\$2,700
- Access Controls	\$40,000	or		\$40,000	S2 Door Access	2019	\$0
Technology							
- Route / Switch Equipment		or		\$0	Replace - Per 5 Year Cycle		
- UPS		or		\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or		\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or		\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or		\$0	Additional Drops		
- Classroom A/V		or		\$0	Replace - Per 5 Year Cycle		
-		or		\$0			
Facility Improvements Sub Total				\$21,456,177			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$2,145,618		2020	\$96,553
Survey/Testing	1.5%			\$321,843		2025	\$86,898
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3.0%			\$643,685	Furniture Refresh, Wrestling Mats, Weight Room Equipment, Hurdles, High Jump, Etc.	2025	\$173,795
Land Purchase							
Contingency	10%			\$2,145,618		2025	\$579,317
Support Costs Subtotal				\$5,256,763			
Program Subtotal				\$26,712,940			
Program Escalation				\$3,380,261			
Program Total				\$30,093,201			\$3,380,261



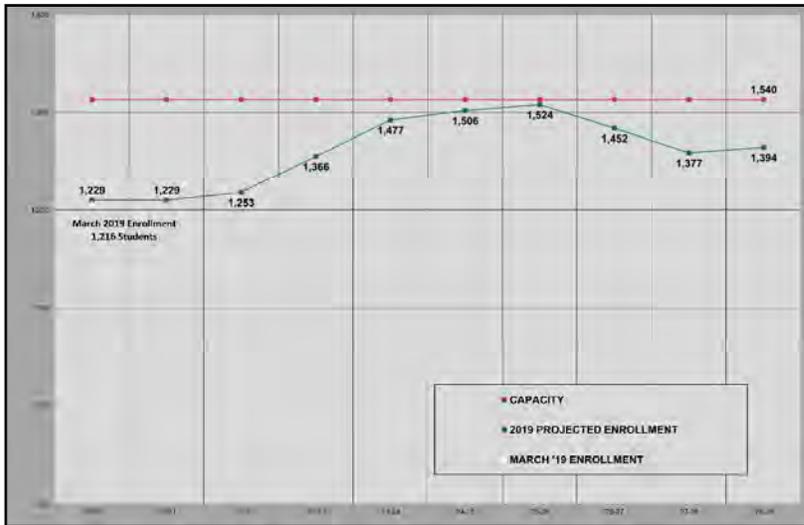
SOUTHERN HIGH SCHOOL

800 CLAYTON ROAD

- School #:** 368 & 700
- Building Size:** 284,000 Square Feet
- Grade Level:** 9-12
- Year Built:** 1993
- Site Size:** 84.0 Acres

SUMMARY

Southern High School's enrollment has historically been below capacity since the City of Medicine Program relocated but the forecast is for an increase in student attendance. The current capacity is 1,540 students and the enrollment as of March 2019 was 1,216, which is a 79% occupancy level. In 2025, the student enrollment is expected to peak at 1,524 before tailing off the next three years, ending with 1,393 students in 2028. Additions associated with the athletic program and a permanent bus satellite facility is suggested and current / deferred maintenance includes a 20 year cycle renovation, site improvements, roofing, kitchen equipment replacement, and mechanical, electrical, plumbing system upgrades.



Current Capacity: 1,540 Students

Current Enrollment: 1,216 Students
79%

Projected Enrollment: 1,394 Students
91%

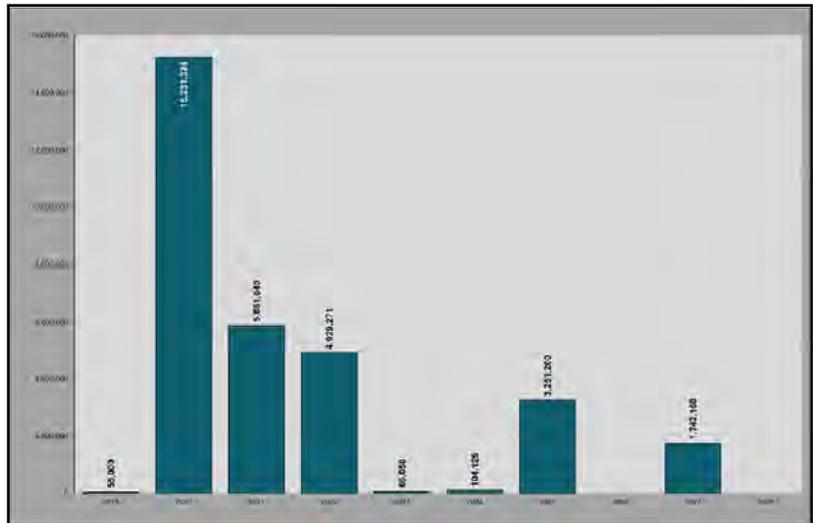
Square Feet per Student: 184.4 sf

Facility Condition Index: .29

New Construction: \$1,757,700

Current / Deferred Maintenance: \$29,503,101

Total Facility Needs: \$31,260,801



Durham Public Schools		Southern High School		1246		Summary Sheet		
Capital Improvement Plan		Campus Program Total		31,260,801				
Category/Description	Lump Sum		Unit	Cost/Unit	Cost Estimate	Comments	Year Required	Escalation
I A Facility Improvements:								
New Construction								
- Addition		or	2,500	\$200.00	\$500,000	Currently at 79% Occupancy Level will increase to 100%		
- Addition		or	3,000	\$200.00	\$600,000	Permanent Building for Transportation Office / Maint. at Bus Lot	2022	\$67,500
- Addition		or			\$0	New Fieldhouse for Athletic Fields	2025	\$162,000
Renovation								
- 20 Year Renovation		or	284,000	\$25.00	\$7,100,000	20-Year Cycle Renovation	2020	\$319,500
- 20 Year Renovation		or			\$0	2018 Renovations (secure entrance, weight room, spin room, gym locker rooms, concession improvements)		
- 20 Year Renovation		or	2,000	\$158.00	\$316,000	Renovate 2 Science Labs	2020	\$14,220
- Theater Arts Renovation	\$550,000	or			\$550,000	AV Lights, Rigging	2025	\$148,500
Site								
- Grading for New Construction	\$115,000	or			\$115,000	Site Prep For New Transportation Office	2022	\$15,525
- Drainage / Erosion	\$25,000	or			\$25,000	Correct Ball Field Drainage	2020	\$1,125
- Irrigation		or	4	\$20,000.00	\$80,000	Replace Irrigation System (4 Fields)	2020	\$3,600
- Athletic Field(s) / Playground(s)		or	8	\$10,000.00	\$80,000	Tennis Court Paving / Resurfacing (2013)	2025	\$21,600
- Athletic Field(s) / Playground(s)	\$75,000	or			\$75,000	Resurface Track (2017)	2027	\$27,000
- Athletic Field(s) / Playground(s)		or	3,400	\$150.00	\$510,000	Refresh Football Field Bleachers	2025	\$137,700
- Athletic Field(s) / Playground(s)		or	1	\$300,000.00	\$300,000	Add LED Athletic Field Lights to Tennis	2025	\$81,000
- Athletic Field(s) / Playground(s)		or	3	\$150,000.00	\$450,000	Replace Athletic Field Lights to LED (Football / Baseball / Softball)	2025	\$121,500
- Athletic Field(s) / Playground(s)		or	2	\$17,500.00	\$35,000	Regrade Baseball & Softball	2020	\$1,575
- Athletic Field(s) / Playground(s)	\$45,000	or			\$45,000	Replace PA System	2025	\$12,150
- Athletic / Playground Equipment		or			\$0			
- Parking Lot(s)		or	12,000	\$18.00	\$216,000	Resurface Visitor, Staff Parking Lots	2020	\$9,720
- Parking Lot(s)	\$20,000	or			\$20,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2027	\$7,200
- Sidewalks		or			\$0			
- Fencing		or	1,000	\$24.00	\$24,000	Replace Soccer Field 5ft Perimeter Fencing	2020	\$1,080
- Site Lighting	\$25,000	or			\$25,000	DPS Owned System, Convert to LED	2025	\$6,750
- Site Lighting		or			\$0			
Building Envelope								
- Structural		or			\$0			
- Roof: Low Slope	\$2,782,225	or			\$2,782,225	Roof Replacement of Main Building and Press Box (Built Up)	2020	\$125,200
- Roof: Metal	\$28,000	or			\$28,000	Recoat Roofs of Canopies	2020	\$1,260
- Roof: Shingle	\$75,734	or			\$75,734	Roof Replacement of Field Houses	2020	\$3,408
- Exterior Walls	\$50,000	or			\$50,000	Pressure Wash / Paint	2020	\$2,250
- Exterior Doors		or			\$0			
- Windows		or			\$0			
- Caulking	\$125,000	or			\$125,000	Re-Caulk Pre Cast Joints - Global	2020	\$5,625
- Caulking		or			\$0			
Building Finishes								
- Flooring: VCT / Vinyl		or			\$0			
- Flooring: Sports Flooring		or			\$0			
- Ceiling: ACT		or			\$0			
- Walls: Painting		or	284,000	\$1.50	\$426,000	Per 7-Year Cycle (Included in Renovation)	2022	\$57,510
- Casework		or			\$0			
- Interior Doors / Windows		or			\$0			
- ADA / Code Upgrades		or			\$0			
- Asbestos Abatement		or			\$0			
- Asbestos Abatement		or			\$0			
Building Systems								
- Food Service	\$250,000	or			\$250,000	Replace Hood, Dish Washer, Cooler / Freezer	2020	\$11,250
- Food Service	\$85,000	or			\$85,000	Refresh Kitchen Equipment	2024	\$19,125
- Plumbing	\$50,000	or			\$50,000	Replace Water Heaters Flat Coil System (200 Gal Tank)	2027	\$18,000
- Fire Sprinkler		or			\$0			
- HVAC		or	284,000	\$4.00	\$1,136,000	Replace Chillers Per 12 Year Cycle (2) (2009, 2015)	2027	\$408,960
- HVAC		or	284,000	\$2.00	\$568,000	Replace Boilers (3) 1993	2021	\$51,120
- HVAC		or	284,000	\$14.00	\$3,976,000	Replace AHUs	2021	\$357,840
- HVAC		or	284,000	\$3.00	\$852,000	Replace Controls	2021	\$76,680
- Electrical		or	275,000	\$1.50	\$412,500	Replace T8s to LED	2020	\$18,563
- Fire Alarm		or	284,000	\$2.50	\$710,000	Full System Replacement - Per 20 Year Cycle	2020	\$31,950
- Security: Cameras		or	56	\$1,000.00	\$56,000	Upgrade Existing "Older" I.P. Cameras & Server	2023	\$10,080
- Security: Cameras	\$35,000	or			\$35,000	System at Bus Parking Lot	2019	\$0
- Security: Intrusion	\$8,750	or			\$8,750	Head End Replacement - Per 20 Year Cycle	2020	\$394
- Intercom	\$60,000	or			\$60,000	Head End Replacement - Per 20 Year Cycle	2020	\$2,700
- Access Controls	\$20,000	or			\$20,000	S2 Door Access	2019	\$0
Technology								
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle		
- UPS		or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or			\$0	Additional Drops		
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle		
- Classroom A/V		or			\$0			
Facility Improvements Sub Total								
					\$22,772,209			
II B Support Costs								
Prof/Pm/Support Fees	10%				\$2,277,221		2020	\$102,475
Survey/Testing	1.5%				\$341,583		2022	\$46,114
Storage and Moving					\$0			
City Fees/County					\$0			
FF&E	3.0%				\$683,166	Furniture Refresh, Wrestling Mats, Weight Room Equipment, Hurdles, High Jump, Et	2022	\$92,227
Land Purchase					\$0			
Contingency	10%				\$2,277,221		2022	\$307,425
Support Costs Subtotal					\$5,579,191			
Program Subtotal					\$28,351,400			
Program Escalation					\$2,909,400			
Program Total					\$31,260,801			



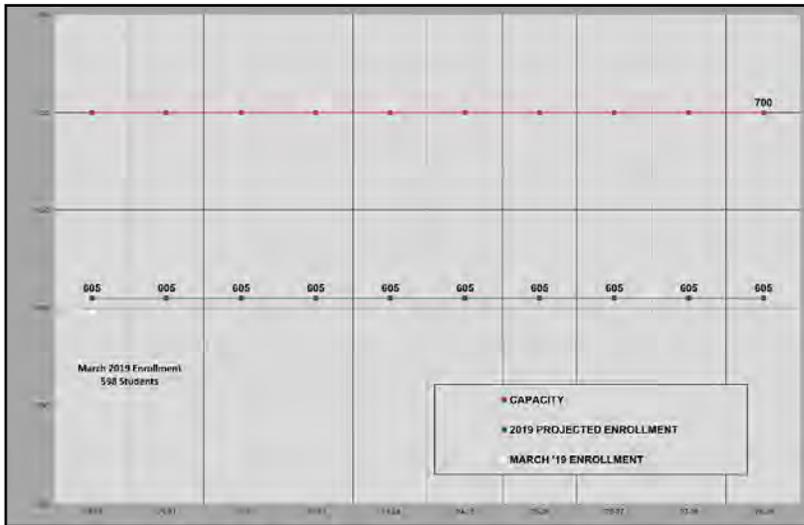
SCHOOL FOR CREATIVE STUDIES

5001 RED MILL ROAD

- School #:** 314
- Building Size:** 124,250 Square Feet
- Grade Level:** 6-12
- Year Built:** 1974, '05, '06, '09
- Site Size:** 54.9 Acres

SUMMARY

The Facility that The School for Creative Studies is located was built in 1974 and had additions / renovations in 2001 and 2003. The student capacity is 700 students and the enrollment as of March 2019 is 598, equating to an 85% occupancy level. This facility is a magnet school so enrollment can be managed with a cap and such is currently planned through 2028. A 20 year cycle renovation is due over the next ten years as well as sitework, roofing, food service equipment, plumbing, HVAC systems, and electrical work.



Current Capacity: 700 Students

Current Enrollment: 598 Students
85%

Projected Enrollment: 605 Students
86%

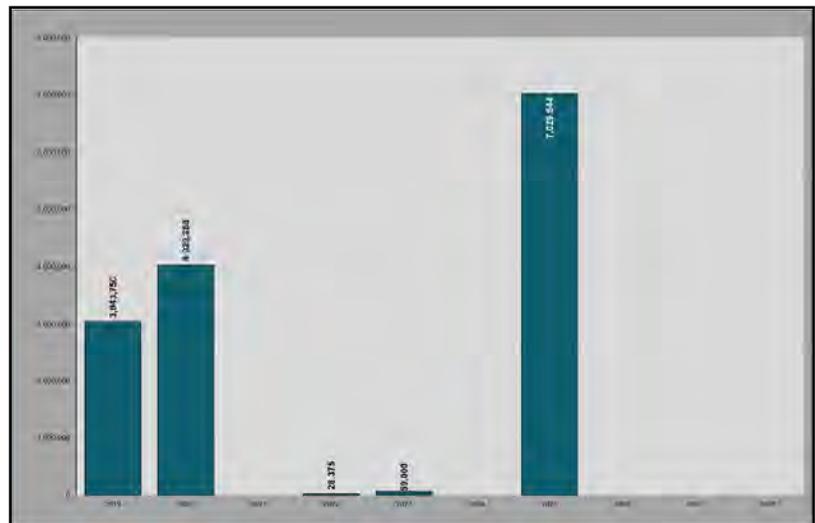
Square Feet per Student: 177.5 sf

Facility Condition Index: .37

New Construction: \$0

Current / Deferred Maintenance: \$14,189,937

Total Facility Needs: \$14,189,937



Durham Public Schools Capital Improvement Plan			School for Creative Studies		605	Summary Sheet		
Category/Description	Campus Program Total		\$ 14,189,937		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A Facility Improvements:								
New Construction								
- Addition		or		\$0	Currently at 85% Occupancy Level and will remain at 85%			
-		or		\$0				
Renovation								
- 20 Year Renovation		or		\$0	Main Entrance Renovated in 2009	2029	\$0	
- 20 Year Renovation		or		\$0	Four Classrooms @ Rear of School Renovated in 2013	2033	\$0	
- 20 Year Renovation		or		\$0	Upgrade One (1) MS Science Labs to HS Lab (2019)			
- 20 Year Renovation	\$158,000	or		\$158,000	Upgrade One (1) MS Science Labs to HS Lab	2025	\$42,660	
- 20 Year Renovation		or	120,000	\$3,000,000	Renovate the Balance of the Facility (20 Year Cycle)	2025	\$810,000	
- Security Vestibule		or		\$0	Develop Passive Security at Front Office (2019)			
- Theater Arts Renovation	\$300,000	or		\$300,000	AV, Lights, Rigging	2025	\$81,000	
Site								
- Grading for New Construction		or		\$0				
- Drainage / Erosion	\$7,500	or		\$7,500	Allowance: Courtyard Near Café Floods (Regrade)	2019	\$0	
- Drainage / Erosion	\$10,000	or		\$10,000	Allowance: Area Near Old Weight Room Floods (Regrade)	2019	\$0	
- Landscaping / Grassing	\$5,000	or		\$5,000	Refresh Landscaping	2025	\$1,350	
- Irrigation		or		\$0				
- Athletic Field(s) / Playground(s)	\$75,000	or		\$75,000	Resurface Track	2025	\$20,250	
- Parking Lot(s)	\$10,000	or		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2020	\$450	
- Parking Lot(s)		or	1,200	\$30,000	Pava Gravel Parking Area at Back of School	2025	\$8,100	
- Driveway(s) / Turn lane(s)		or		\$0				
- Sidewalks		or		\$0				
- ADA		or		\$0				
- Site Lighting		or		\$0	Duke Energy Owned System			
-		or		\$0				
Building Envelope								
- Structural		or		\$0				
- Roof, Low Slope	\$1,299,857	or		\$1,299,857	Replace Media Center Bldg., Front Classroom Bldg., Connecting Corridor	2020	\$58,494	
- Roof, Low Slope	\$995,882	or		\$995,882	Replace Cafeteria Bldg., Voc Ed, Gym Bldg.	2025	\$268,888	
- Exterior Walls	\$5,000	or		\$5,000	Pressure Wash Exterior	2025	\$1,350	
- Exterior Doors		or		\$0				
- Windows		or		\$0				
-		or		\$0				
Building Finishes								
- Flooring, Sports Flooring		or	2	\$20,000.00	\$40,000	Refinish Gym Floor	2025	\$10,800
- Ceiling, ACT		or			\$0			
- Walls, Painting		or	124,250	\$1.50	\$186,375	Per 7-Year Cycle	2025	\$50,321
- Casework		or			\$0			
- Interior Doors / Windows		or			\$0			
- ADA / Code Upgrades		or			\$0			
- Asbestos Abatement		or	124,250	\$1.40	\$173,950	Pre 1989 CMU Walls	2025	\$46,967
-		or			\$0			
Building Systems								
- Food Service	\$250,000	or		\$250,000	Replace Hood, Dish Washer, Cooler / Freezer	2020	\$11,250	
- Food Service	\$85,000	or		\$85,000	Refresh Kitchen Equipment	2025	\$22,950	
- Plumbing	\$125,000	or		\$125,000	Allowance: Replace Two (2) Sewer Pumps	2019	\$0	
- Plumbing		or	2	\$10,000.00	\$20,000	Replace Water Heaters (2) 100 Gal NOW	2019	\$0
- Plumbing		or	6	\$500.00	\$3,000	Replace Hose Bibs	2019	\$0
- Plumbing	\$5,000	or		\$5,000	Investigate Under Slab Sewer Issue (Near Kitchen / Group Restroom)	2019	\$0	
- Fire Sprinkler		or			\$0			
- HVAC		or	124,250	\$4.00	\$497,000	Replace Chiller Per 12 Year Cycle (2007)	2019	\$0
- HVAC		or	124,250	\$2.00	\$248,500	Replace Boilers (2) - Per 20 Year Cycle	2019	\$0
- HVAC		or	124,250	\$14.00	\$1,739,500	Replace AHUs	2019	\$0
- HVAC		or	124,250	\$3.00	\$372,750	Replace Controls - Per 20 Year Cycle (2016)	2019	\$0
- Electrical		or	115,000	\$1.50	\$172,500	Replace T8s to LED	2025	\$46,575
- Electrical	\$3,500	or		\$3,500	Investigate Replacing Switchgear	2019	\$0	
- Electrical	\$12,000	or		\$12,000	Communications Repeater	2019	\$0	
- Fire Alarm		or	124,250		\$0	Full System Replacement - Per 20 Year Cycle (2019)	2039	\$0
- Security: Cameras		or	15	\$2,000.00	\$30,000	Replaced in 2010 and need an additional 15	2020	\$1,350
- Security: Cameras		or	25	\$2,000.00	\$50,000	Upgrade Existing "Older" I.P. Cameras & Server	2023	\$9,000
- Security: Intrusion	\$6,931	or		\$6,931	Head End Replacement - Per 20 Year Cycle	2025	\$1,871	
- Intercom		or	124,250	\$0.85	\$105,613	Full System Replacement - Per 20 Year Cycle	2020	\$4,753
- Access Controls	\$25,000	or		\$25,000	S2 Door Access	2022	\$3,375	
-		or			\$0			
Technology								
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle		
- UPS		or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or			\$0	Additional Drops		
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle		
-		or			\$0			
Facility Improvements Sub Total					\$10,047,858			
II B Support Costs								
Prof/Pm/Support Fees	10%			\$1,004,786		2020	\$45,215	
Survey/Testing	1.5%			\$150,718		2020	\$6,782	
Storage and Moving				\$0				
City Fees/County				\$0				
FF&E	3%			\$301,436	Refresh Student Desks / FFE	2025	\$81,388	
Land Purchase				\$0				
Contingency	10%			\$1,004,786		2020	\$45,215	
Support Costs Subtotal					\$2,461,725			
Program Subtotal					\$12,509,583			
Program Escalation					\$1,680,354		\$1,680,354	
Program Total					\$14,189,937			



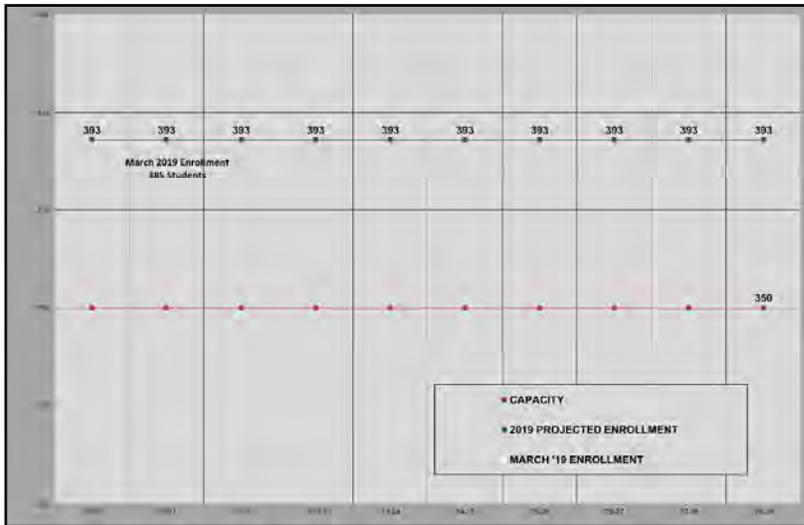
J.D. CLEMENT EARLY COLLEGE

1801 FAYETTEVILLE STREET

- School #:** 309
- Building Size:** N/A (Leased Space)
- Grade Level:** 9-12
- Year Built:** N/A (Leased Space)
- Site Size:** N/A (Leased Space)

SUMMARY

The Early College Program is located in space provided by North Carolina Central University. As a choice program, enrollment and capacity can be balanced. A security Entrance is planned for 2019 but occasional space upgrades may be provided by NCCU. Therefore, only technology upgrades are proposed as a separate item.



Current Capacity: 350 Students

Current Enrollment: 385 Students
96%

Projected Enrollment: 393 Students
112%

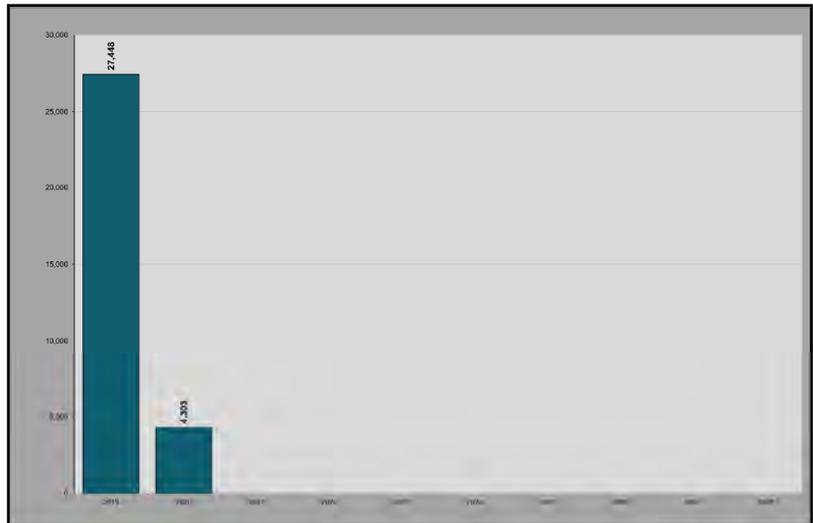
Square Feet per Student: N/A

Facility Condition Index: N/A

New Construction: \$0

Current / Deferred Maintenance: \$31,751

Total Facility Needs: \$31,751



Durham Public Schools Capital Improvement Plan			J.D. Clement Early College (Review)		School 309	Summary Sheet	
Category/Description	Campus Program Total		\$ 31,751		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A	Facility Improvements:						
	New Construction						
	- Addition	or		\$0			
	- Canopies	or		\$0			
	-	or		\$0			
	Renovation						
	- Security Vestibule	or		\$0	Develop Passive Security at Front Office (2019)		
	-	or		\$0			
	Site						
	- Grading for New Construction	or		\$0			
	- Drainage / Erosion	or		\$0			
	- Landscaping / Grassing	or		\$0			
	- Irrigation	or		\$0			
	- Athletic Field(s) / Playground(s)	or		\$0			
	- Athletic / Playground Equipment	or		\$0			
	- Parking Lot(s)	or		\$0			
	- Driveway(s) / Turn lane(s)	or		\$0			
	- Sidewalks	or		\$0			
	- ADA	or		\$0			
	- Fencing	or		\$0			
	- Site Lighting	or		\$0			
	- Utilities	or		\$0			
	-	or		\$0			
	Building Envelope						
	- Structural	or		\$0			
	- Roof, Low Slope	or		\$0			
	- Roof, Metal	or		\$0			
	- Roof, Shingle	or		\$0			
	- Exterior Walls	or		\$0			
	- Exterior Doors	or		\$0			
	- Storefronts / Window Walls	or		\$0			
	- Windows	or		\$0			
	-	or		\$0			
	Building Finishes						
	- Flooring: VCT / Vinyl	or		\$0			
	- Flooring: Hard Tile / Terrazzo	or		\$0			
	- Flooring: Sports Flooring	or		\$0			
	- Ceiling: ACT	or		\$0			
	- Ceiling: Other	or		\$0			
	- Walls: Painting	or		\$0			
	- Walls: Other	or		\$0			
	- Casework	or		\$0			
	- Interior Doors / Windows	or		\$0			
	- ADA / Code Upgrades	or		\$0			
	- Asbestos Abatement	or		\$0			
	-	or		\$0			
	Building Systems						
	- Food Service	or		\$0			
	- Plumbing	or		\$0			
	- Fire Sprinkler	or		\$0			
	- HVAC	or		\$0			
	- Electrical	or		\$0			
	- Fire Alarm	or		\$0	Full System Replacement - Per 20 Year Cycle		
	- Security: Cameras	or	\$10,000	\$10,000	Full System Replacement - Per 6 Year Cycle (Replaced 2007)	2019	\$0
	- Security: Intrusion	or	\$4,953	\$4,953	Head End Replacement - Per 20 Year Cycle	2019	\$0
	- Intercom	or		\$0	Head End Replacement - Per 20 Year Cycle		
	- Access Controls	or	\$10,000	\$10,000	Full System Replacement - Per 15 Year Cycle	2019	\$0
	-	or		\$0			
	Technology						
	- Route / Switch Equipment	or		\$0	Replace - Per 5 Year Cycle		
	- UPS	or		\$0	Replace - Per 5 Year Cycle		
	- Wireless Access Points	or		\$0	Replace - Per 5 Year Cycle		
	- VOIP Phones System	or		\$0	Replace - Per 10 Year Cycle		
	- Data Cabling / Racks	or		\$0	Additional Drops		
	- Classroom A/V	or		\$0	Replace - Per 5 Year Cycle		
	-	or		\$0			
	Facility Improvements Sub Total			\$24,953			
II B	Support Costs						
	Prof/Pm/Support Fees	10%		\$2,495		2019	\$0
	Survey/Testing	1.5%		\$374		2020	\$17
	Storage and Moving			\$0			
	City Fees/County			\$0			
	FF&E	5%		\$1,248	Allowance - Refresh	2020	\$56
	Land Purchase			\$0			
	Contingency	10%		\$2,495		2020	\$112
	Support Costs Subtotal			\$6,613			
	Program Subtotal			\$31,566			
	Program Escalation			\$185			\$185
	Program Total			\$31,751			



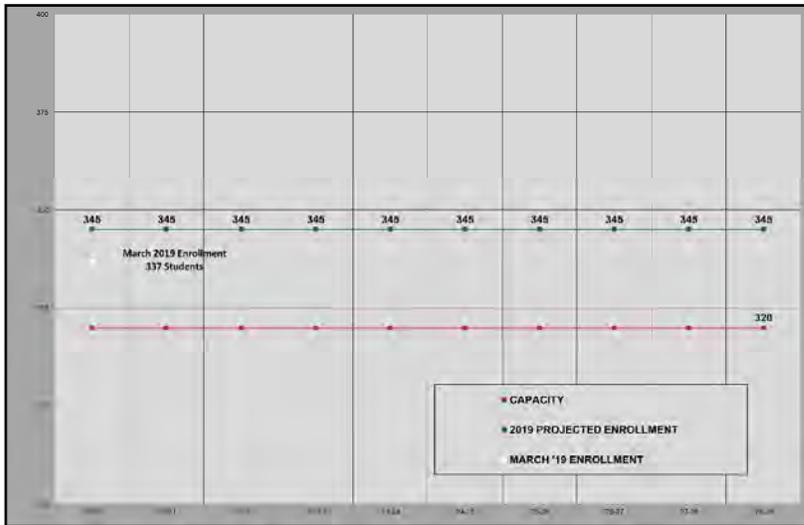
CITY OF MEDICINE ACADEMY

4100 NORTH ROXBORO ROAD

- School #:** 317
- Building Size:** 40,519 Square Feet
- Grade Level:** 9-12
- Year Built:** 2011
- Site Size:** 7.2 Acres

SUMMARY

City of Medicine Academy is located in a new facility constructed through the 2007 Bond and opened in 2011. This facility has a capacity of 320 students, which is the defined student cap, but enrollment is expected to be a constant 345 over the next ten years, and therefore overcrowding relief should be addressed. This facility does not currently have a gym to support PE activities and therefore should be considered. Typical maintenance such as HVAC chiller replacement and painting should be addressed over the next ten years.



Current Capacity: 320 Students

Current Enrollment: 337 Students
105%

Projected Enrollment: 345 Students
108%

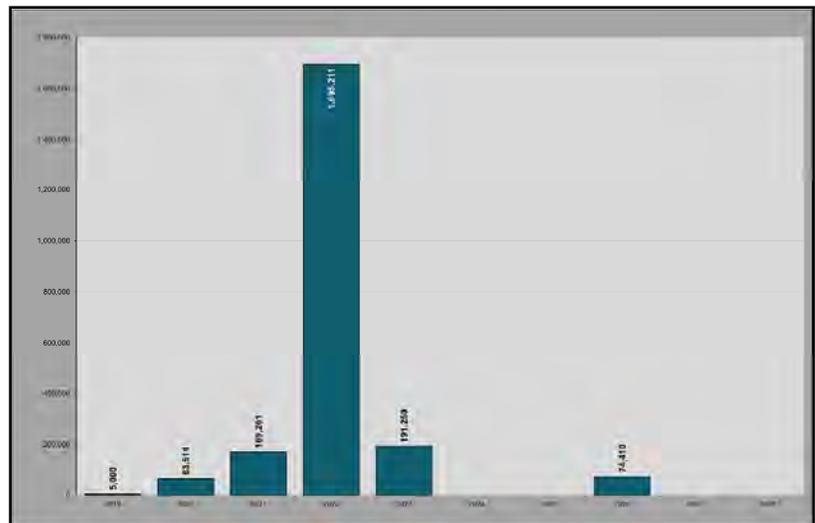
Square Feet per Student: 126.6 sf

Facility Condition Index: .18

New Construction: \$1,814,700

Current / Deferred Maintenance: \$383,946

Total Facility Needs: \$2,198,646



Durham Public Schools Capital Improvement Plan			City of Medicine Academy		345	Summary Sheet		
Category/Description	Campus Program Total		\$ 2,198,646		Comments	Year Required	Escalation	
	Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A	Facility Improvements:							
	New Construction							
						Currently at 105% Occupancy Level and will increase to 108%		
	- Addition				\$0	Opened in 2011	2022	\$0
	- Addition	6,000	\$200.00		\$1,200,000	Add Gym for PE	2022	\$162,000
	- Canopies				\$0			
	-				\$0			
	Renovation							
	- 20 Year Renovation				\$0			
	- Bio-Retention System				\$0			
	Site							
	- Grading for New Construction	\$115,000			\$115,000	Site Prep for Gym Addition	2022	\$15,525
	- Drainage / Erosion	\$5,000			\$5,000	Water Intrudes Under Doors	2019	\$0
	- Landscaping / Grassing				\$0			
	- Irrigation				\$0			
	- Athletic Field(s) / Playground(s)				\$0			
	- Athletic / Playground Equipment				\$0			
	- Parking Lot(s)				\$0			
	- Driveway(s) / Turn lane(s)				\$0			
	- Sidewalks				\$0			
	- ADA				\$0			
	- Fencing				\$0			
	- Site Lighting				\$0	Duke Energy Owned System		
	- Utilities				\$0			
	-				\$0			
	Building Envelope							
	- Structural				\$0			
	- Roof: Low Slope				\$0			
	- Roof: Metal				\$0			
	- Roof: Shingle				\$0			
	- Exterior Walls				\$0			
	- Exterior Doors				\$0			
	- Storefronts / Window Walls				\$0			
	- Windows				\$0			
	-				\$0			
	Building Finishes							
	- Flooring: VCT / Vinyl				\$0			
	- Flooring: Hard Tile / Terrazzo				\$0			
	- Flooring: Sports Flooring				\$0			
	- Ceiling: ACT				\$0			
	- Ceiling: Other				\$0			
	- Walls: Painting	40,519	\$1.50		\$60,779	Per 7 Year Cycle (2011)	2020	\$2,735
	- Walls: Other				\$0			
	- Casework				\$0			
	- Interior Doors / Windows				\$0			
	- ADA / Code Upgrades				\$0			
	- Asbestos Abatement				\$0			
	-				\$0			
	Building Systems							
	- Food Service				\$0	Replace Hood, Dish Washer, Cooler / Freezer	2031	\$0
	- Plumbing				\$0			
	- Fire Sprinkler				\$0			
	- HVAC	40,519	\$4.00		\$162,076	Replace Chiller Per 12 Year Cycle (2011)	2023	\$29,174
	- HVAC	40,519			\$0	Replace Boilers (2) - Per 20 Year Cycle	2031	\$0
	- HVAC	40,519			\$0	Replace AHUs	2031	\$0
	- HVAC	40,519			\$0	Replace Controls - Per 20 Year Cycle	2031	\$0
	- Electrical	40,519			\$0	Replace T8s to LED	2031	\$0
	- Fire Alarm	40,519			\$0	Full System Replacement - Per 20 Year Cycle	2031	\$0
	- Security: Cameras				\$0	Full System Replacement - Per 6 Year Cycle (2011)		
	- Security: Intrusion				\$0	Full System Replacement - Per 20 Year Cycle	2031	\$0
	- Intercom		40,519		\$0	Full System Replacement - Per 20 Year Cycle	2031	\$0
	- Access Controls	\$10,000			\$10,000	S2 Door Access	2026	\$3,150
	-				\$0			
	Technology							
	- Route / Switch Equipment		or		\$0	Replace - Per 5 Year Cycle		
	- UPS		or		\$0	Replace - Per 5 Year Cycle		
	- Wireless Access Points		or		\$0	Replace - Per 5 Year Cycle		
	- VOIP Phones System		or		\$0	Replace - Per 10 Year Cycle		
	- Data Cabling / Racks		or		\$0	Additional Drops		
	- Classroom A/V		or		\$0	Replace - Per 5 Year Cycle		
	-		or		\$0			
	Facility Improvements Sub Total				\$1,552,855			
	II B Support Costs							
	Prof/Pm/Support Fees	10%			\$155,285		2021	\$13,976
	Survey/Testing	1.5%			\$23,293		2022	\$3,145
	Storage and Moving				\$0			
	City Fees/County				\$0			
	FF&E	3%			\$46,586	Allowance - Refresh	2026	\$14,674
	Land Purchase				\$0			
	Contingency	10%			\$155,285		2022	\$20,964
	Support Costs Subtotal				\$380,449			
	Program Subtotal				\$1,933,304			
	Program Escalation				\$265,342			\$265,342
	Program Total				\$2,198,646			



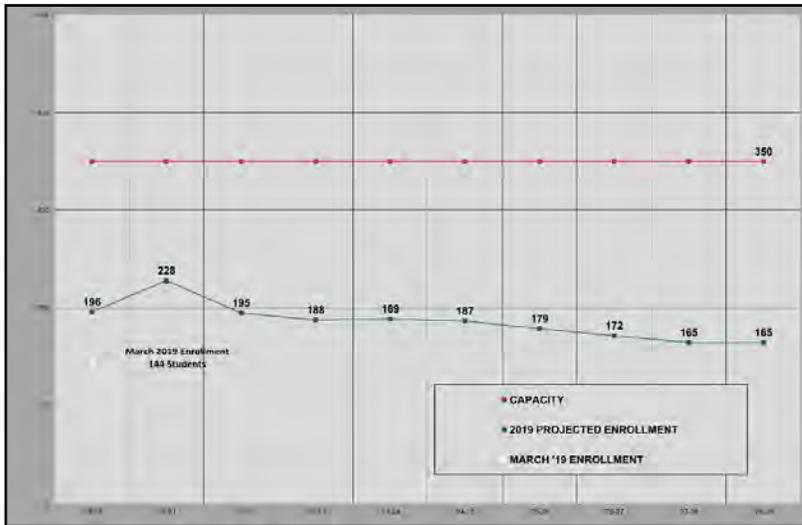
DURHAM PERFORMANCE LEARNING CENTER

401 NORTH DRIVER STREET

School #: 322 & 329
Building Size: 104,869 Square Feet
Grade Level: 9-12
Year Built: 1933, '09
Site Size: 7.0 Acres

SUMMARY

The Durham Performance Learning Center was previously located in rental space at the Northgate Mall but was relocated to a new DPS facility that was opened in 2009. Although the facility is not occupied by just DPS staff and students (2nd floor and part of 1st floor is occupied by other municipalities), it has a capacity of 350 students and in its current use, has an enrollment of 144 students, which is a 41% occupancy level. Therefore some thought should be given to how best utilize the underused space at this facility in the future as the enrollment trend is to not exceed 47% occupancy level. The FCI is at a good level and includes work associated with painting and HVAC System.



Current Capacity: 350 Students

Current Enrollment: 144 Students
41%

Projected Enrollment: 165 Students
47%

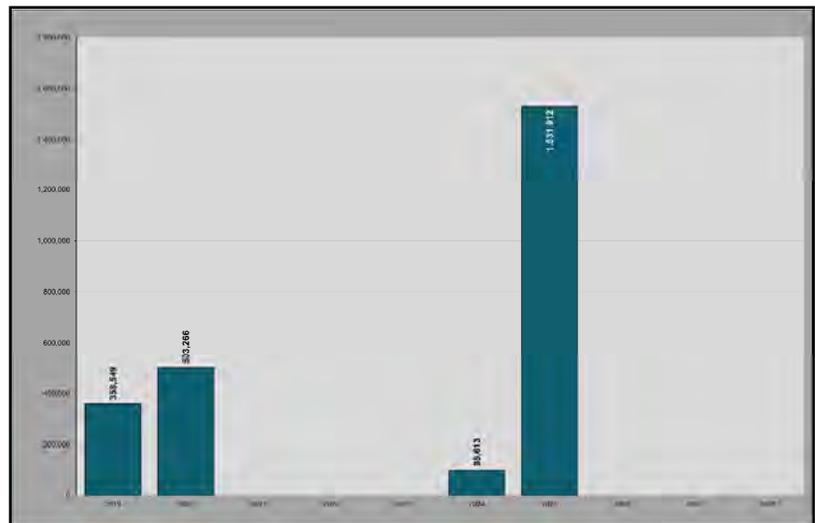
Square Feet per Student: 299.6 sf

Facility Condition Index: .08

New Construction: \$0

Current / Deferred Maintenance: \$2,492,039

Total Facility Needs: \$2,492,039



Durham Public Schools Capital Improvement Plan			Durham Performance Learning Center		School 322 & 329	Summary Sheet	
Category/Description	Campus Program Total		\$ 2,492,039		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A Facility Improvements:							
New Construction					Currently at 41% Occupancy Level but will increase to 47%		
- Addition		or		\$0	Opened in 2009		
- Canopies		or		\$0			
-		or		\$0			
Renovation							
- 20 Year Renovation		or	104,869	\$0	Entire Facility	2029	\$0
- 20 Year Renovation	\$3,500	or		\$3,500	Investigate Combining Room 3302, 3112, & 1302 into Two Small Rooms	2019	\$0
- 20 Year Renovation		or	2,500	\$25.00	Cos Lab Refresh	2024	\$14,063
- Security Vestibule	\$70,750	or		\$70,750	Develop Passive Security at Front Office (Also on Survey)	2020	\$3,184
- Theater Arts Renovation		or		\$0	A/V, Lights, Rigging	2029	\$0
Site							
- Grading for New Construction		or		\$0			
- Drainage / Erosion		or		\$0			
- Landscaping / Grassing		or		\$0	Refresh Landscaping	2029	\$0
- Irrigation		or		\$0			
- Athletic Field(s) / Playground(s)		or		\$0			
- Athletic / Playground Equipment		or		\$0			
- Parking Lot(s)	\$10,000	or		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2019	\$0
- Driveway(s) / Turn lane(s)		or		\$0			
- Sidewalks		or		\$0			
- ADA		or		\$0			
- Fencing		or		\$0			
- Site Lighting		or		\$0	Duke Energy Owned System		
- Utilities		or		\$0			
-		or		\$0			
Building Envelope							
- Structural		or		\$0			
- Roof: Low Slope	\$163,164	or		\$163,164	Roof Section A of Gym Bldg.	2020	\$7,342
- Roof: Metal		or		\$0	Entire Roof Replaced in 2009	2029	\$0
- Roof: Shingle		or		\$0			
- Exterior Walls		or		\$0			
- Exterior Doors		or		\$0			
- Storefronts / Window Walls		or		\$0			
- Windows		or		\$0			
-		or		\$0			
Building Finishes							
- Flooring: VCT / Vinyl		or		\$0			
- Flooring: Hard Tile / Terrazzo		or		\$0			
- Flooring: Sports Flooring		or		\$0			
- Ceiling: ACT		or		\$0			
- Ceiling: Other		or		\$0			
- Walls: Painting		or	104,869	\$1.50	Per 7 Year Cycle (2009)	2019	\$0
- Walls: Other		or		\$0			
- Casework		or		\$0			
- Interior Doors / Windows		or		\$0			
- ADA / Code Upgrades		or		\$0			
- Asbestos Abatement		or		\$0			
-		or		\$0			
Building Systems							
- Food Service		or		\$0			
- Plumbing		or		\$0			
- Fire Sprinkler		or		\$0			
- HVAC		or	104,869	\$10.00	Replace (33) Packaged Units (15 Year Cycle)	2025	\$283,146
- HVAC		or	104,869	\$1.50	Install Controls (Only T Stats)	2025	\$42,472
- Electrical		or	97,000	\$0	Replace T8s to LED	2029	\$0
- Elevator		or		\$0			
- Fire Alarm		or	104,869	\$0	Full System Replacement - Per 20 Year Cycle	2029	\$0
- Security: Cameras		or	18	\$1,000.00	Upgrade Existing "Older" I.P. Cameras	2024	\$4,050
- Security: Intrusion	\$6,931	or		\$6,931	Full System Replacement - Per 20 Year Cycle	2019	\$0
- Intercom		or		\$0	Head End Replacement - Per 20 Year Cycle	2029	\$0
- Access Controls	\$10,000	or		\$10,000	Head End Replacement - Per 15 Year Cycle	2019	\$0
Technology							
- Route / Switch Equipment		or		\$0	Replace - Per 5 Year Cycle		
- UPS		or		\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or		\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or		\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or		\$0	Additional Drops		
- Classroom A/V		or		\$0	Replace - Per 5 Year Cycle		
-		or		\$0			
Facility Improvements Sub Total				\$1,708,142			
II B Support Costs							
Prof/Pm/Support Fees	10%			\$170,814		2019	\$0
Survey/Testing	1.5%			\$25,622		2020	\$1,153
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3%			\$51,244	Refresh	2020	\$2,306
Land Purchase				\$0			
Contingency	10%			\$170,814		2020	\$7,687
Support Costs Subtotal				\$418,495			
Program Subtotal				\$2,126,637			
Program Escalation				\$365,403			\$365,403
Program Total				\$2,492,039			



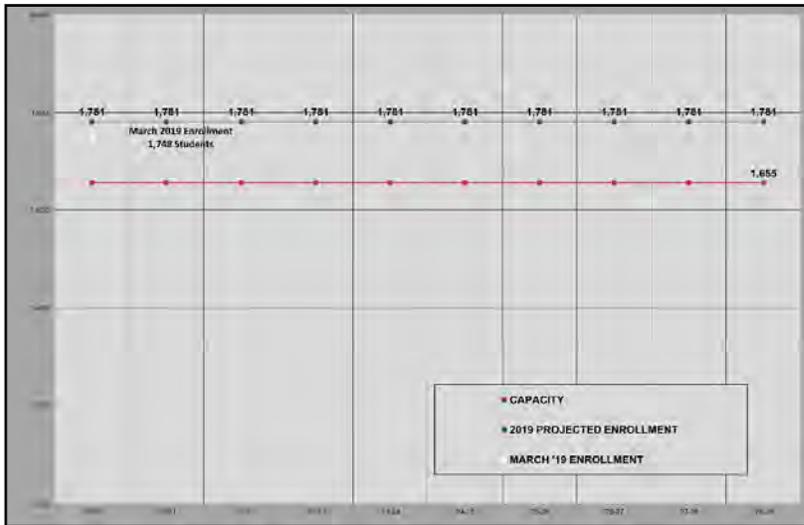
DURHAM SCHOOL OF THE ARTS

400 NORTH DUKE STREET

- School #:** 323
- Building Size:** 352,267 Square Feet
- Grade Level:** 6-12
- Year Built:** 1921, '28, '49, '55, '62, '75, '88, '08, '11
- Site Size:** 10.6 Acres

SUMMARY

DSA is a historic facility having been built in 1921 and is a very popular magnet school. Over the years, the facility has had nine additions / renovations and currently has a capacity of 1655 students but an enrollment of 1748 students, 6% over the building's capacity. This enrollment is estimated at 1781 students and will remain constant over the next ten years, so an addition should be considered to efficiently handle the surplus student population. Additionally, we have included budgetary figures for fully revamping the campus per DTW Architects master plan.



Current Capacity: 1,655 Students

Current Enrollment: 1,748 Students
106%

Projected Enrollment: 1,781 Students
108%

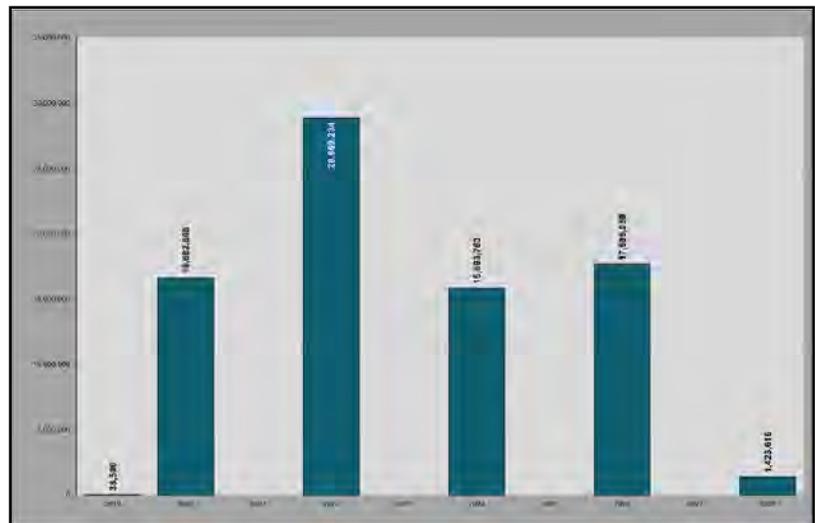
Square Feet per Student: 212.9 sf

Facility Condition Index: .74

New Construction: \$40,868,393

Current / Deferred Maintenance: \$39,725,587

Total Facility Needs: \$80,593,979



Durham Public Schools		Durham School of the Arts		1771		Summary Sheet		
Capital Improvement Plan		Campus Program Total		\$ 80,593,979				
Category/Description		Lump Sum	Unit	Cost/Unit	Cost Estimate	Comments	Year Required	Escalation
I A	Facility Improvements:							
	New Construction					Currently at 106% Occupancy Level but will increase to 108%		
	- Addition	or	32,500	\$200.00	\$6,500,000	Kitchen, Cafeteria, Commons, EC Classroom Expansion	2022	\$877,500
	- Addition	or	10,660	\$200.00	\$2,130,000	Performance Theater / 300 Seats	2022	\$287,500
	- Addition	or	44,100	\$200.00	\$8,820,000	Match / Science Classroom Wing	2022	\$1,190,700
	- Addition	or	1,600	\$200.00	\$320,000	Gym Lobby Addition	2022	\$43,200
	- Addition	or	\$45,000		\$45,000	Dumpster Surround / Mechanical Surround	2022	\$6,075
	- Addition	or	18,600	\$200.00	\$3,720,000	Music Spaces "Infill" Addition	2024	\$837,000
	- Addition	or	26,250	\$200.00	\$5,250,000	Admin & Classroom Addition	2026	\$1,653,750
	- Addition	or	3,000	\$175.00	\$525,000	Athletic Fieldhouse	2022	\$70,875
	-	or			\$0			
	Renovation							
	- Major Renovation	or	40,300	\$60.00	\$2,418,000	Gym Building (Lower & Main)	2022	\$326,430
	- Major Renovation	or	76,660	\$60.00	\$4,599,600	Renovation of Main Building (Less Middle School Building)	2024	\$1,034,910
	- Major Renovation	or	30,488	\$60.00	\$1,829,280	Weaver Auditorium (How Many Seats?)	2024	\$411,588
	- Major Renovation	or	8,704	\$25.00	\$217,600	Black Box Theater	2028	\$88,128
	- 20 Year Renovation	or			\$0	20 Year Renovation of Three (3) Gym Locker Rooms - +/- 3,600 SF (2018)	2038	\$0
	- 20 Year Renovation	or	30,960	\$0	\$0	20 Year Renovation of 2008 Classroom Addition	2028	\$0
	- 20 Year Renovation	or	86,136	\$0	\$0	20 Year Renovation of MS Building - Completed 2011	2031	\$0
	- Theater Arts Renovation	or	\$550,000		\$550,000	A/V, Lights, Rigging	2022	\$74,250
	Site							
	- Grading for New Construction	or	3	\$115,000.00	\$345,000	Site Prep for Additions (w/ Storm Sewer & Erosion Control)	2022	\$46,575
	- Demo Existing Structures	or	52,515	\$8.50	\$446,378	Demo Existing Math / Science Building (52,515 SF)	2022	\$60,261
	- Demo Existing Structures	or	2,500	\$8.50	\$21,250	Demo Existing Physical Plant Building (2,000 SF)	2022	\$2,859
	- Demo Existing Structures	or	30,152	\$8.50	\$256,292	Demo Existing Media Center Building (30,152 SF)	2022	\$34,599
	- Landscaping / Grassing	or	\$100,000		\$100,000	Allowance - New Landscape	2028	\$40,500
	- Irrigation	or	2	\$20,000.00	\$40,000	Replace Irrigation at Soc & Softball	2022	\$5,400
	- Athletic Field(s) / Playground(s)	or	\$75,000		\$75,000	Resurface Track	2028	\$30,375
	- Athletic Field(s) / Playground(s)	or	3	\$175,000.00	\$525,000	Add LED Lights at Tennis courts, Replace Athletic Field Lights to LED	2022	\$70,875
	- Athletic Field(s) / Playground(s)	or	2	\$17,500.00	\$35,000	Regrade Soc & Softball	2022	\$4,725
	- Athletic Field(s) / Playground(s)	or	\$45,000		\$45,000	Replace PA System	2022	\$6,075
	- Parking Lot(s)	or			\$0	Rebuild Student Parking Lot (2019)		
	- Parking Lot(s)	or	\$20,000		\$20,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2020	\$900
	- Parking Lot(s)	or	25	\$2,250.00	\$56,250	Add Small Parking Lot	2028	\$22,781
	- Driveway(s) / Turn lane(s)	or	\$25,000		\$25,000	Allowance - Resurface Drive and Lot off Minerva Ave	2022	\$3,375
	- Driveway(s) / Turn lane(s)	or	3,000	\$25.00	\$75,000	New Student Drop Off Driveway at New Cafe' Area	2022	\$10,125
	- Sidewalks	or	\$5,000		\$5,000	Allowance - Demo and Replace Sidewalk between school and track	2020	\$225
	- Sidewalks	or	7,550	\$5.50	\$41,525	Phase 1 - 4 Sidewalks (New)	2022	\$5,606
	- ADA	or	\$35,000		\$35,000	Misc. HC Ramps	2019	\$0
	- Site Lighting	or	\$20,000		\$20,000	Duke Energy Owned System	2028	\$8,100
	- Utilities	or	4	\$30,000.00	\$120,000	New Backflow Vaults	2020	\$5,400
	-	or			\$0			
	Building Envelope							
	- Structural	or	\$3,500		\$3,500	Investigate Settlement Issues at MS Building	2019	\$0
	- Roof, Low Slope	or	\$400,000		\$400,000	Second Floor Commons Roof	2024	\$90,000
	- Roof, Metal	or	25,000	\$50.00	\$1,250,000	Replacing existing slate with metal (main building)	2022	\$168,750
	- Roof, Shingle	or	22,180	\$25.00	\$554,500	Roof Replacement @ Weaver Auditorium (22,180 SF)	2024	\$124,763
	- Roof, Shingle	or	\$20,000		\$20,000	Replace (K1, K2, Section E & Gym Corridor I)	2022	\$2,700
	- Roof, Other	or	\$160,000		\$160,000	Replace Cupola	2022	\$21,600
	- Exterior Walls	or	\$200,000		\$200,000	Tuck Point, Pressure Wash, Seal Single Wyth	2028	\$81,000
	- Exterior Walls	or	492	\$700.00	\$344,400	G1, G2, G3	2028	\$139,482
	- Windows	or			\$0	Replacement Included in Renovation		
	-	or			\$0			
	Building Finishes							
	- Flooring: Sports Flooring	or			\$0	Replace Main Gym Floor (Included in Gym Renovation)	2022	\$0
	- Walls: Painting	or	187,112	\$1.50	\$280,668	Per 7-Year Cycle	2022	\$37,890
	- ADA / Code Upgrades	or			\$0	ADA Compliance Included in Renovations		
	- Asbestos Abatement	or			\$0	Abatement Included in Renovation - MS & Gym Building (2018)		
	-	or			\$0			
	Building Systems							
	- Food Service	or			\$0			
	- Plumbing	or	187,112	\$10.00	\$1,871,120	Full Plumbing System Replacement (Included in Renovation)	2024	\$421,002
	- Fire Sprinkler	or	187,112	\$3.00	\$561,336	Add Fire Sprinkler System	2022	\$75,780
	- HVAC	or	187,112	\$4.00	\$748,448	Replace Chillers - Per 12 Year Cycle (2008)	2020	\$33,680
	- HVAC	or	187,112	\$2.50	\$467,780	Replace Boilers - Per 20 Year Cycle	2020	\$21,050
	- HVAC	or	187,112	\$37.50	\$7,016,700	Replace AHUs	2020	\$315,752
	- HVAC	or	187,112	\$3.00	\$561,336	Replace Controls - Per 20 Year Cycle	2020	\$25,260
	- HVAC	or	86,136	\$0	\$0	MS Building HVAC (2011)	2031	\$0
	- Electrical	or	187,112	\$1.50	\$280,668	Replace T12s & T8s to LED	2020	\$12,630
	- Electrical	or	273,248		\$0	Replace Switchgear, Sub Panels (Included in Renovations)		
	- Electrical	or	\$120,000		\$120,000	Add Generator	2020	\$5,400
	- Fire Alarm	or	187,112	\$2.50	\$467,780	Full System Replacement - Per 20 Year Cycle (Included in Renovation)	2020	\$21,050
	- Security: Cameras	or	\$43,750		\$43,750	Full System Replacement - Per 6 Year Cycle	2020	\$1,969
	- Security: Intrusion	or			\$0	Full System Replacement - Per 20 Year Cycle (Included in Renovation)	2020	\$0
	- Intercom	or			\$0	Full System Replacement - Per 20 Year Cycle (Included in Renovation)	2020	\$0
	- Access Controls	or	\$100,000		\$100,000	Full System Replacement - Per 15 - Year Cycle	2020	\$4,500
	-	or			\$0			
	Technology							
	- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle		
	- UPS	or			\$0	Replace - Per 5 Year Cycle		
	- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle		
	- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle		
	- Data Cabling / Racks	or			\$0	Additional Drops		
	- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle		
	-	or			\$0			
	Facility Improvements Sub Total				\$54,663,161			
II B	Support Costs							
	- Prof/Pm/Support Fees	or	11%		\$6,012,948		2020	\$270,583
	- Survey/Testing	or	1.5%		\$819,947		2026	\$258,283
	- Storage and Moving	or			\$0			
	- City Fees/County	or	0.50%		\$273,316		2026	\$86,094
	- FF&E	or	3%		\$1,639,895	Furniture Refresh, Wrestling Mats, Weight Room Equipment, Hurdles, High Jump, Etc.	2026	\$516,567
	- Land Purchase	or			\$0			
	- Contingency	or	10%		\$5,466,316		2026	\$1,721,890
	Support Costs Subtotal				\$14,212,422			
	Program Subtotal				\$68,875,582			
	Program Escalation				\$11,718,397			\$11,718,397
	Program Total				\$80,593,979			



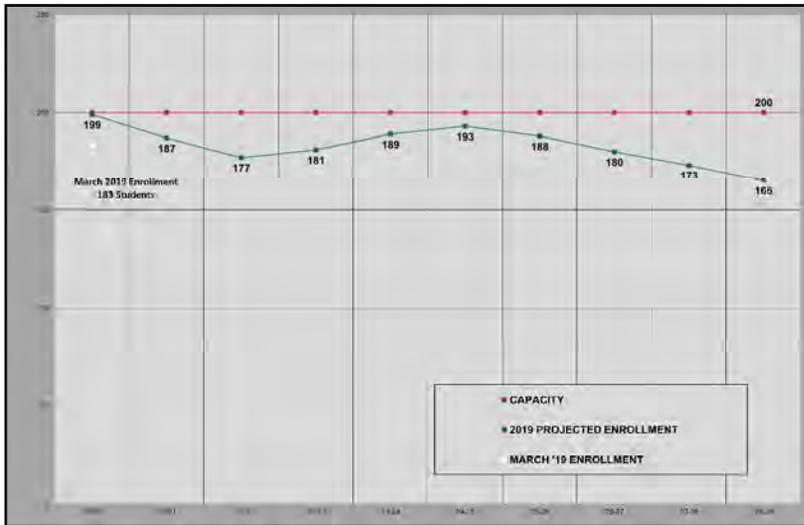
MIDDLE COLLEGE HIGH SCHOOL

1637 LAWSON STREET

- School #:** 353
- Building Size:** N/A (Leased Space)
- Grade Level:** 11-12
- Year Built:** N/A (Leased Space)
- Site Size:** N/A (Leased Space)

SUMMARY

Middle College High School utilizes space provided by Durham Tech. No space modifications are planned but technology upgrades are included in a separate item.



Current Capacity: 200 Students

Current Enrollment: 183 Students
92%

Projected Enrollment: 165 Students
83%

Square Feet per Student: N/A

Facility Condition Index: N/A

New Construction: \$0

Current / Deferred Maintenance: \$0

Total Facility Needs: \$0



Durham Public Schools Capital Improvement Plan			Middle College HS at DTCC		TBD	Summary Sheet	
Category/Description	Campus Program Total		\$ -		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A	Facility Improvements:						
	New Construction						
	- Addition	or		\$0			
	- Canopies	or		\$0			
	-	or		\$0			
	Renovation						
	- 20 Year Renovation	or		\$0			
	-	or		\$0			
	Site						
	- Grading for New Construction	or		\$0			
	- Drainage / Erosion	or		\$0			
	- Utilities	or		\$0			
	- Landscaping / Grassing	or		\$0			
	- Irrigation	or		\$0			
	- Athletic Field(s) / Playground(s)	or		\$0			
	- Athletic / Playground Equipment	or		\$0			
	- Parking Lot(s)	or		\$0			
	- Driveway(s) / Turn lane(s)	or		\$0			
	- Sidewalks	or		\$0			
	- ADA	or		\$0			
	- Fencing	or		\$0			
	- Site Lighting	or		\$0			
	- Utilities	or		\$0			
	-	or		\$0			
	Building Envelope						
	- Structural	or		\$0			
	- Roof, Low Slope	or		\$0			
	- Roof, Metal	or		\$0			
	- Roof, Shingle	or		\$0			
	- Exterior Walls	or		\$0			
	- Exterior Doors	or		\$0			
	- Storefronts / Window Walls	or		\$0			
	- Windows	or		\$0			
	-	or		\$0			
	Building Finishes						
	- Flooring: VCT / Vinyl	or		\$0			
	- Flooring: Hard Tile / Terrazzo	or		\$0			
	- Flooring: Sports Flooring	or		\$0			
	- Ceiling: ACT	or		\$0			
	- Ceiling: Other	or		\$0			
	- Walls: Painting	or		\$0			
	- Walls: Other	or		\$0			
	- Casework	or		\$0			
	- Interior Doors / Windows	or		\$0			
	- ADA / Code Upgrades	or		\$0			
	- Asbestos Abatement	or		\$0			
	-	or		\$0			
	Building Systems						
	- Food Service	or		\$0			
	- Plumbing	or		\$0			
	- Fire Sprinkler	or		\$0			
	- HVAC	or		\$0			
	- Electrical	or		\$0			
	- Fire Alarm	or		\$0			
	- Security: Cameras	or		\$0			
	- Security: Intrusion	or		\$0			
	- Intercom	or		\$0			
	- Access Controls	or		\$0	Full System Replacement - Per 15 - Year Cycle	2020	\$0
	-	or		\$0			
	Technology						
	- Route / Switch Equipment	or		\$0	Replace - Per 5 Year Cycle		
	- UPS	or		\$0	Replace - Per 5 Year Cycle		
	- Wireless Access Points	or		\$0	Replace - Per 5 Year Cycle		
	- VOIP Phones System	or		\$0	Replace - Per 10 Year Cycle		
	- Data Cabling / Racks	or		\$0	Additional Drops		
	- Classroom A/V	or		\$0	Replace - Per 5 Year Cycle		
	-	or		\$0			
	Facility Improvements Sub Total			\$0			
II B	Support Costs						
	Prof/Pm/Support Fees	10%		\$0		2020	\$0
	Survey/Testing	1.5%		\$0		2020	\$0
	Storage and Moving			\$0			
	City Fees/County			\$0			
	FF&E	3%		\$0	Allowance - Refresh	2020	\$0
	Land Purchase			\$0			
	Contingency	10%		\$0		2020	\$0
	Support Costs Subtotal			\$0			
	Program Subtotal			\$0			
	Program Escalation			\$0			\$0
	Program Total			\$0			



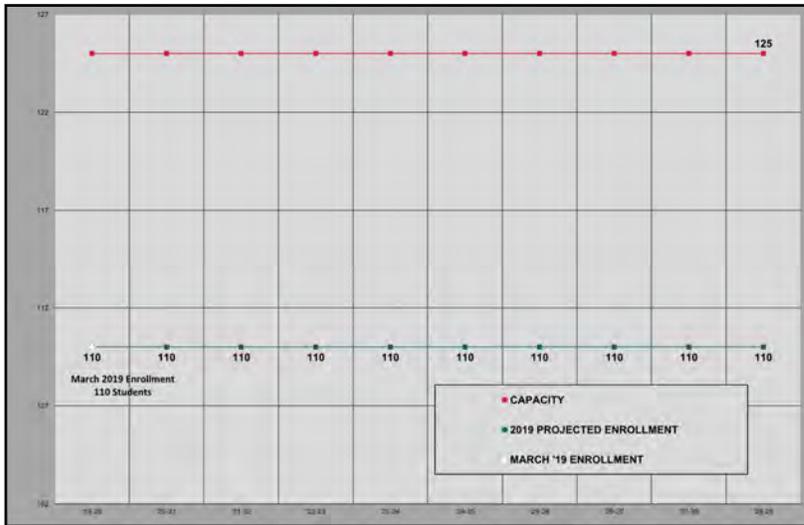
LAKEVIEW SCHOOL

3705 DEERBORN DRIVE

- School #:** 341
- Building Size:** 40,769 Square Feet
- Grade Level:** 6-12
- Year Built:** 1962, '05, '10
- Site Size:** 11.9 Acres

SUMMARY

Lakeview School is an alternative facility serving approximately 100-125 students. A new gymnasium was completed in 2010 but the balance of the facility is due for a renovation and the Roof Top HVAC units are aging out so replacement should be considered over the next 10 years.



Current Capacity: 125 Students

Current Enrollment: 110 Students
88%

Projected Enrollment: 110 Students
88%

Square Feet per Student: 326.2 sf

Facility Condition Index: .19

New Construction: \$6,225

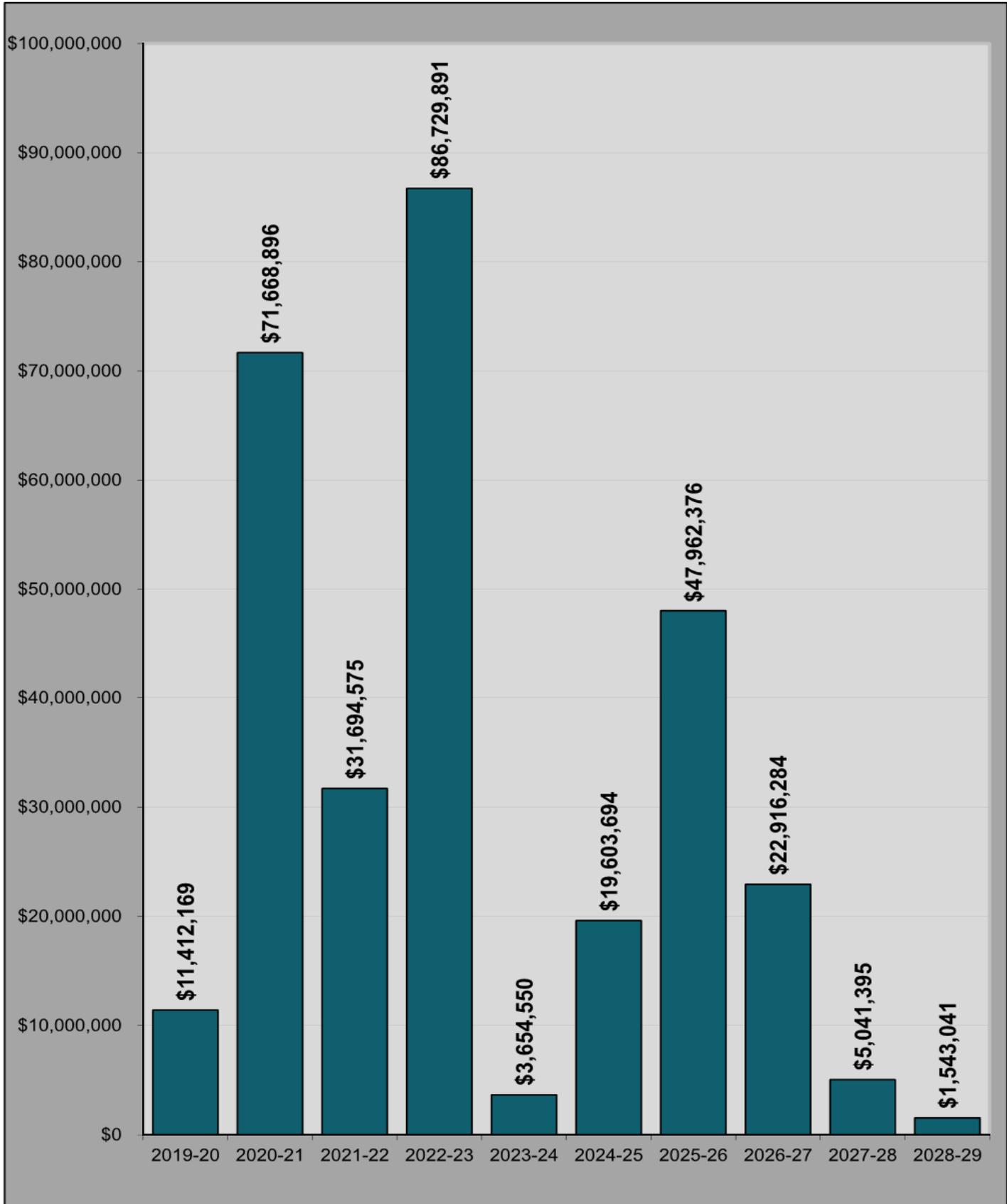
Current / Deferred Maintenance: \$2,297,315

Total Facility Needs: \$2,303,540



Durham Public Schools			Lakeview School		School 341	Summary Sheet		
Capital Improvement Plan			2,303,540		Comments	Year Required	Escalation	
Category/Description	Campus Program Total	Unit	Cost/Unit	Cost Estimate				
	Lump Sum							
I A Facility Improvements:								
New Construction								
- Addition	\$5,000	or		\$5,000	Investigate Possibility of Enlarging Cafeteria (Too Small)	2019	\$0	
-		or		\$0				
Renovation								
- 20 Year Renovation		or	30,000	\$25.00	\$750,000	20 Year Renovation of All Areas Except Gym	2020	\$33,750
- 20 Year Renovation		or	10,769		\$0	20 Year Cycle Renovation of Balance (2010)	2030	\$0
- Security Vestibule		or			\$0	Develop Passive Security at Front Office (2019)		
-		or						
Site								
- Grading for New Construction		or			\$0			
- Drainage / Erosion		or			\$0			
- Landscaping / Grassing	\$5,000	or			\$5,000	Landscape Refresh	2020	\$225
- Irrigation		or			\$0			
- Athletic Field(s) / Playground(s)		or			\$0			
- Athletic / Playground Equipment		or			\$0			
- Parking Lot(s)	\$10,000	or			\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2020	\$450
- Parking Lot(s)		or	40	\$1,000.00	\$40,000	Allowance: Repave Parking Lot	2020	\$1,800
- Driveway(s) / Turn lane(s)		or			\$0			
- Sidewalks		or			\$0			
- ADA		or			\$0			
- Fencing		or	1,500	\$30.00	\$45,000	Install 6ft Site Perimeter Fence	2020	\$2,025
- Site Lighting		or			\$0	Duke Energy Owned System		
- Utilities		or			\$0			
-		or			\$0			
Building Envelope								
- Structural		or			\$0			
- Roof: Low Slope		or			\$0	Main Building Replaced in 2008 / Gym in 2010	2030	\$0
- Roof: Metal		or			\$0	Canopies Replaced in 2010	2035	\$0
- Roof: Shingle		or			\$0			
- Exterior Walls		or			\$0			
- Exterior Doors		or			\$0			
- Storefronts / Window Walls		or			\$0			
- Windows		or			\$0			
-		or			\$0			
Building Finishes								
- Flooring: VCT / Vinyl		or			\$0			
- Flooring: Hard Tile / Terrazzo		or			\$0			
- Flooring: Sports Flooring		or			\$0			
- Ceiling: ACT		or			\$0			
- Ceiling: Other		or			\$0			
- Walls: Painting		or	40,769	\$1.50	\$61,154	Per 7 Year Cycle (Included w/ 20 Year Renovation)	2020	\$2,752
- Walls: Other		or			\$0			
- Casework		or			\$0			
- Interior Doors / Windows		or			\$0			
- ADA / Code Upgrades	\$10,000	or			\$10,000	Upgrade Miscellaneous Building Items	2020	\$450
- Asbestos Abatement	\$75,000	or			\$75,000	Allowance: Replace Asbestos Flooring	2020	\$3,375
-		or			\$0			
Building Systems								
- Food Service		or			\$0			
- Plumbing		or	2		\$0	Replace Water Heaters (2) 125 Gals (2017)	2037	\$0
- Plumbing		or	8	\$500.00	\$4,000	Replace Hose Bibs	2019	\$0
- Fire Sprinkler		or			\$0			
- HVAC		or	40,769	\$10.00	\$407,690	Replace RTU's - Per 20 Year Cycle (21 Total Units) (1998)	2020	\$18,346
- HVAC		or	40,769	\$3.00	\$122,307	Replace Controls - Per 20 Year Cycle	2020	\$5,504
- Electrical		or	40,769	\$1.50	\$61,154	Replace T12s & T8s to LED	2020	\$2,752
- Electrical	\$15,000	or			\$15,000	Replace Canopy Lights	2020	\$675
- Electrical	\$3,500	or			\$3,500	Investigate Replacing Switchgear	2019	\$0
- Fire Alarm		or	40,769	\$2.50	\$101,923	Full System Replacement - Per 20 Year Cycle	2020	\$4,587
- Security: Cameras		or	14	\$1,000.00	\$14,000	Upgrade Existing "Older" I.P. Cameras	2023	\$2,520
- Security: Intrusion	\$4,953	or			\$4,953	Head End Replacement - Per 20 Year Cycle	2020	\$223
- Intercom	\$20,000	or			\$20,000	Head End Replacement - Per 20 Year Cycle	2020	\$900
- Access Controls	\$20,000	or			\$20,000	S2 Door Access	2020	\$900
-		or						
Technology								
- Route / Switch Equipment		or			\$0	Replace - Per 5 Year Cycle		
- UPS		or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points		or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System		or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks		or			\$0	Additional Drops		
- Classroom A/V		or			\$0	Replace - Per 5 Year Cycle		
-		or			\$0			
Facility Improvements Sub Total					\$1,775,680			
II B Support Costs								
Prof/Pm/Support Fees	10%				\$177,568		2019	\$0
Survey/Testing	1.5%				\$26,635		2020	\$1,199
Storage and Moving					\$0			
City Fees/County					\$0			
FF&E	3%				\$53,270	Allowance - Refresh	2020	\$2,397
Land Purchase					\$0			
Contingency	10%				\$177,568		2020	\$7,991
Support Costs Subtotal					\$435,041			
Program Subtotal					\$2,210,721			
Program Escalation					\$92,819			\$92,819
Program Total					\$2,303,540			

HIGH / 6-12 CHOICE CONSTRUCTION COST



\$302,226,870

CENTRAL SERVICES SUMMARY SHEETS



DURHAM PUBLIC SCHOOLS



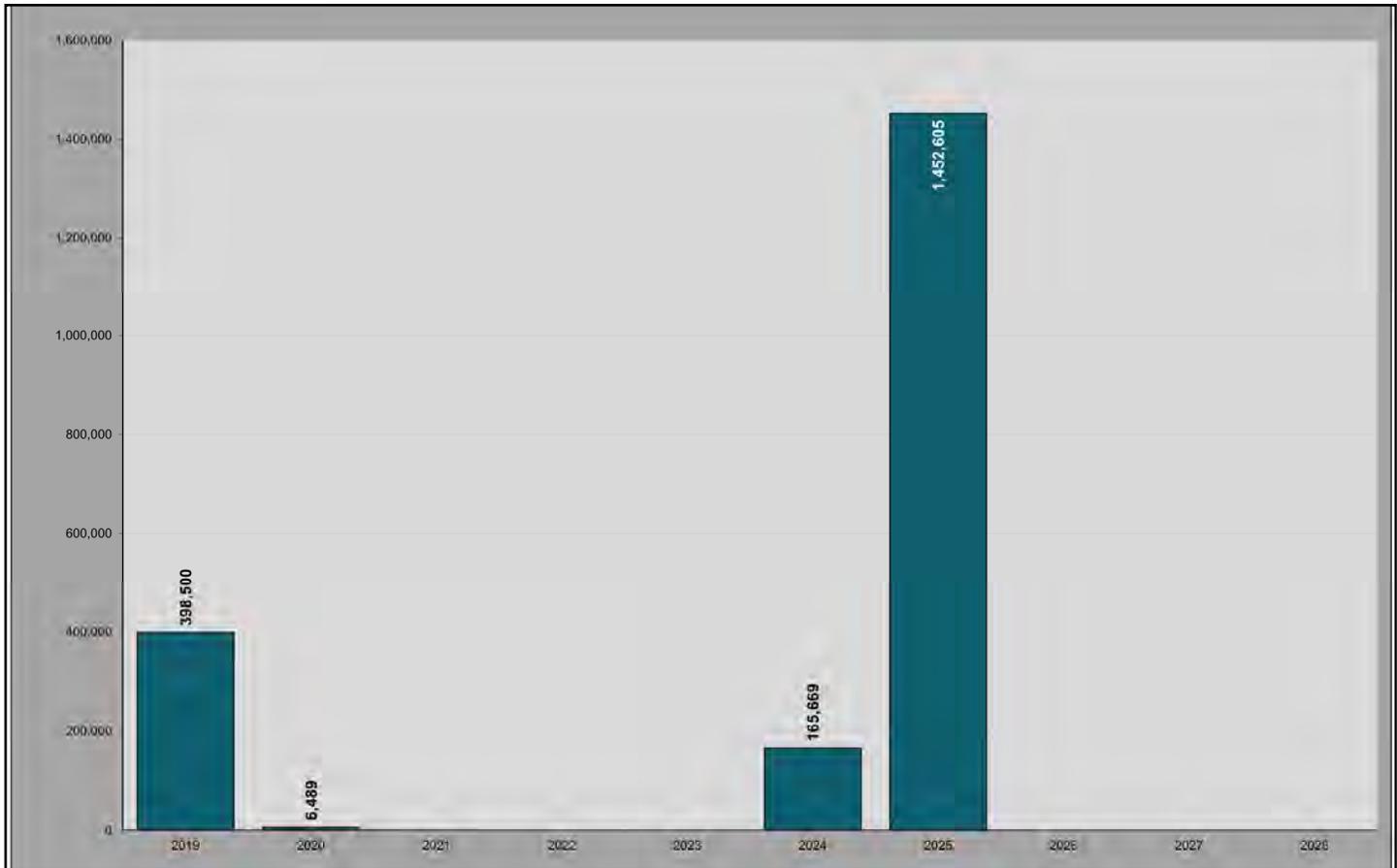
BACON STREET BUILDING

808 BACON STREET

School #: 580
Building Size: 94,780 Square Feet
Grade Level: N/A
Year Built: 1990
Site Size: 5.2 Acres

SUMMARY

Over the next ten years, the Bacon Street facility will require typical maintenance needs that includes a 20 year cycle renovation, site improvements, replacement of a cooler and freezer, as well as mechanical and electrical upgrades.



Facility Condition Index: .07

New Construction: \$0

Total Facility Needs: \$2,023,263

Current / Deferred Maintenance: \$2,023,263

Durham Public Schools Capital Improvement Plan			Bacon Street Center		580	Summary Sheet			
Category/Description	Campus Program Total		\$ 2,023,263		Comments	Year Required	Escalation		
	Lump Sum	Unit	Cost/Unit	Cost Estimate					
I A	Facility Improvements:								
	New Construction								
	- Addition	or		\$0					
	- Canopies	or		\$0					
	-	or		\$0					
	Renovation								
	- Office Renovation	or	20,000	\$25.00	\$500,000	Renovate Offices	2025	\$135,000	
	- Security Vestibule	or			\$0	Develop Passive Security at Front Office (2019)			
	-	or			\$0				
	Site								
	- Grading for New Construction	or			\$0				
	- Drainage / Erosion	or			\$0				
	- Landscaping / Grassing	or			\$0				
	- Irrigation	or			\$0				
	- Athletic Field(s) / Playground(s)	or			\$0				
	- Athletic / Playground Equipment	or			\$0				
	- Parking Lot(s)	or	\$10,000		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2019	\$0	
	- Parking Lot(s)	or	\$3,500		\$3,500	Investigate Parking Lot Expansion	2019	\$0	
	- Driveway(s) / Turn lane(s)	or			\$0				
	- Sidewalks	or			\$0				
	- ADA	or			\$0				
	- Fencing	or			\$0				
	- Site Lighting	or			\$0	Duke Energy Owned System			
	- Utilities	or			\$0				
	-	or			\$0				
	Building Envelope								
	- Structural	or			\$0				
	- Roof: Low Slope	or			\$0	Entire Roof Replaced in 2013	2033	\$0	
	- Roof: Metal	or			\$0	Replace CNS Entrance Canopies 20 Year Cycle	2033	\$0	
	- Roof: Metal	or	\$6,210		\$6,210	Replace Loading Dock Canopy	2020	\$279	
	- Roof: Shingle	or			\$0				
	- Exterior Walls	or			\$0				
	- Exterior Doors	or			\$0				
	- Storefronts / Window Walls	or			\$0				
	- Windows	or			\$0				
	-	or			\$0				
	Building Finishes								
	- Flooring: VCT / Vinyl	or			\$0				
	- Flooring: Hard Tile / Terrazzo	or			\$0				
	- Flooring: Sports Flooring	or			\$0				
	- Ceiling: AC1	or			\$0				
	- Ceiling: Other	or			\$0				
	- Walls: Painting	or	94,780	\$1.50	\$142,170	Per 7-Year Cycle (Included in Renovation)	2025	\$38,386	
	- Walls: Other	or			\$0				
	- Casework	or			\$0				
	- Interior Doors / Windows	or			\$0				
	- ADA / Code Upgrades	or			\$0				
	- Asbestos Abatement	or			\$0				
	-	or			\$0				
	Building Systems								
	- Food Service	or	\$150,000		\$150,000	Replace Cooler / Freezers	2025	\$40,500	
	- Food Service	or			\$0	Relocate Cooling units to roof	2025	\$0	
	- Plumbing	or			\$0				
	- Fire Sprinkler	or			\$0				
	- HVAC	or	\$15,000		\$15,000	Replace (1) Remaining RTU Unit - Others Replaced in 2012	2019	\$0	
	- HVAC	or	20,000	\$14.00	\$280,000	Replace VAVs	2019	\$0	
	- HVAC	or	20,000	\$3.00	\$60,000	Replace Controls - Per 20 Year Cycle	2019	\$0	
	- Electrical	or	20,000	\$1.50	\$30,000	Replace T8s to LED (Front Office)	2025	\$8,100	
	- Electrical	or			\$0				
	- Fire Alarm	or	\$30,000		\$30,000	Full System Replacement - Per 20 Year Cycle	2025	\$8,100	
	- Security: Cameras	or	\$30,000		\$30,000	Full System Replacement - Per 6 Year Cycle (Replaced 2012)	2019	\$0	
	- Security: Intrusion	or	\$4,953		\$4,953	Head End Replacement - Per 20 Year Cycle	2025	\$1,337	
	- Intercom	or	94,780	\$0.85	\$80,563	Full System Replacement - Per 20 Year Cycle	2025	\$21,752	
	- Access Controls	or	\$10,000		\$10,000	Full System Replacement - Per 15 Year Cycle	2025	\$2,700	
	-	or			\$0				
	Technology								
	- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle			
	- UPS	or			\$0	Replace - Per 5 Year Cycle			
	- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle			
	- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle			
	- Data Cabling / Racks	or			\$0	Additional Drops			
	- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle			
	-	or			\$0				
	Facility Improvements Sub Total					\$1,352,396			
II B	Support Costs								
	Prof/Pm/Support Fees		10%		\$135,240		2024	\$30,429	
	Survey/Testing		1.5%		\$20,286		2025	\$5,477	
	Storage and Moving				\$0				
	City Fees/County				\$0				
	FF&E		3.0%		\$40,572	Allowance - Refresh	2025	\$10,954	
	Land Purchase				\$0				
	Contingency		10%		\$135,240		2025	\$36,515	
	Support Costs Subtotal					\$331,337			
	Program Subtotal					\$1,683,733			
	Program Escalation					\$339,530			\$339,530
	Program Total					\$2,023,263			



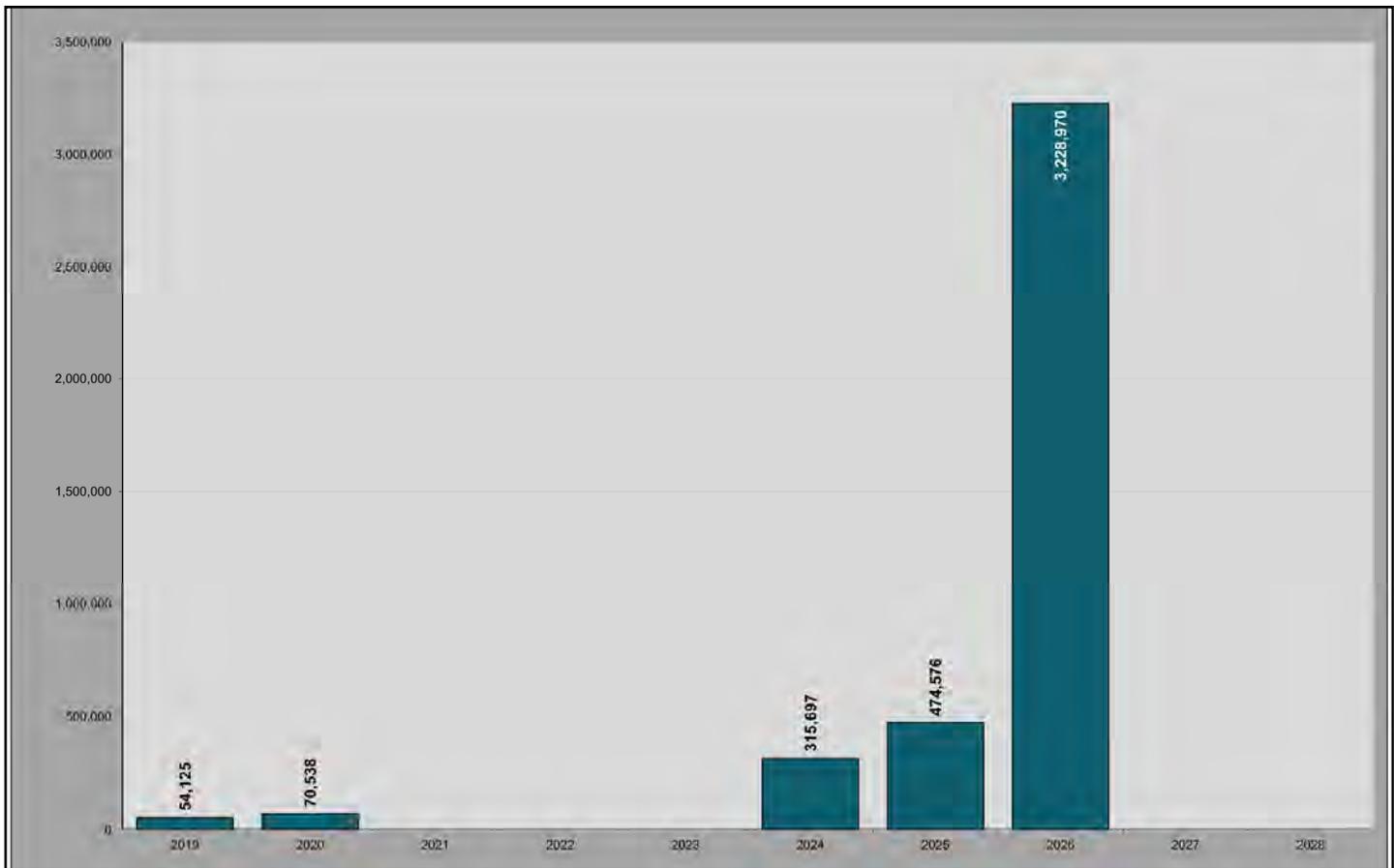
FULLER BUILDING

511 CLEVELAND STREET

- School #:** 520
- Building Size:** 54,670 Square Feet
- Grade Level:** N/A
- Year Built:** 1964
- Site Size:** 1.7 Acres

SUMMARY

The Fuller building is the main District office facility and is located in downtown Durham. The building is 54,670 square feet, built in 1964 and recently had the roof replaced. Over the next ten years, the District should pursue a 20 year cycle renovation, HVAC System replacement, LED lighting upgrades, and fire alarm replacement.



Facility Condition Index: .25

New Construction: \$0

Total Facility Needs: \$4,143,905

Current / Deferred Maintenance: \$4,143,905



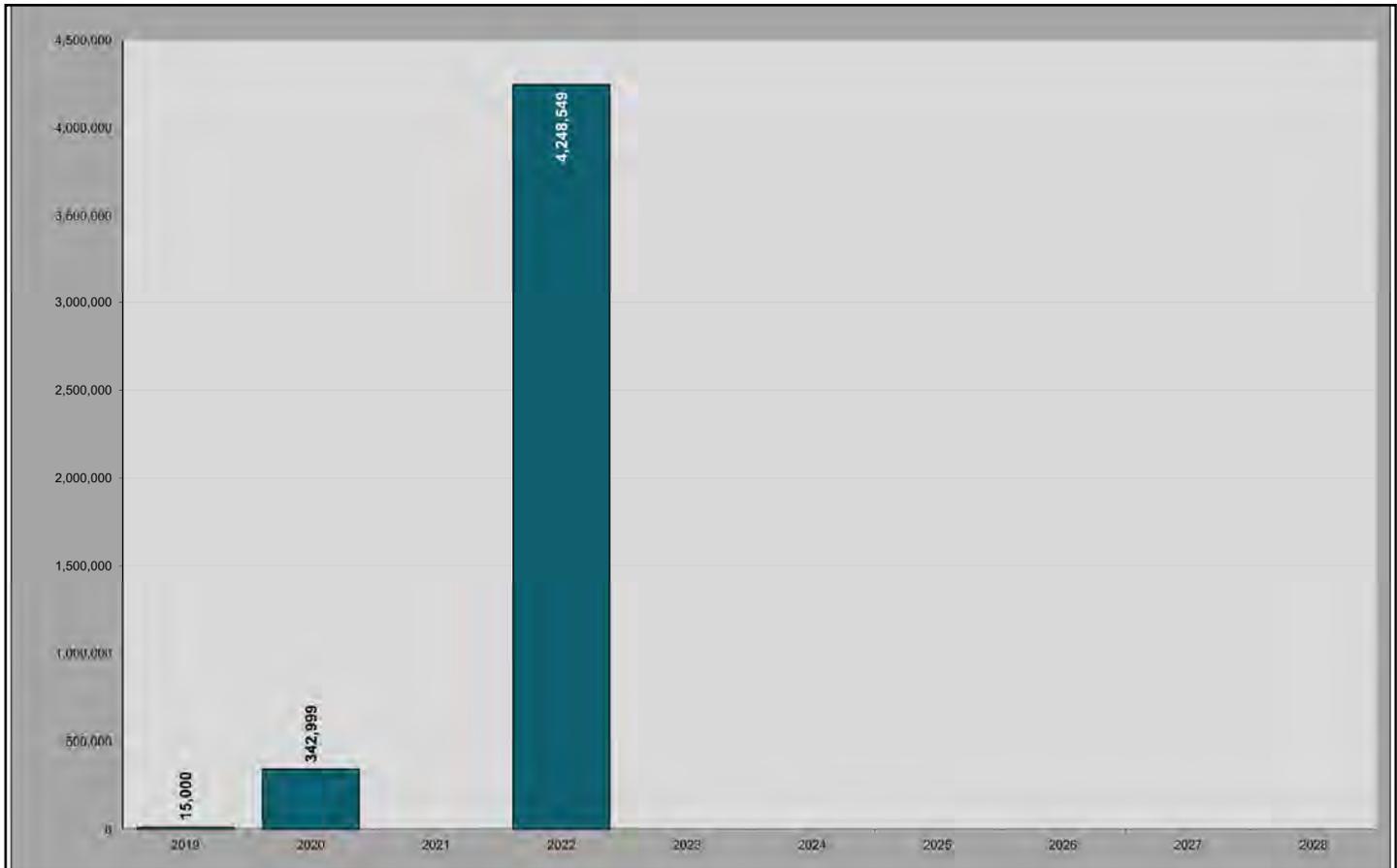
HAMLIN ROAD CENTRAL SERVICE

1817 HAMLIN ROAD

School #: 523
Building Size: 43,859 Square Feet
Grade Level: N/A
Year Built: 1976
Site Size: 10.6 Acres

SUMMARY

Built in 1976, and is the main Bus Transportation office and IT services. Some renovations were provided by the 2003 Bond and proposed includes a new District server room, and a bus maintenance building. Additionally, the District should consider a 20 year cycle renovation, parking lot expansion and maintenance, as well as HVAC and electrical system improvements.



Facility Condition Index: .34

New Construction: \$2,228,700

Total Facility Needs: \$4,606,548

Current / Deferred Maintenance: \$2,377,848

Durham Public Schools Capital Improvement Plan			Hamlin Road Central Service		550	Summary Sheet	
Category/Description	Campus Program Total		\$ 4,606,548		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A	Facility Improvements:						
	New Construction						
	- Addition	or 2,000	\$500.00	\$1,000,000	Construct New District Server / Clean Room (W/ no servers, UPS, Etc.)	2022	\$135,000
	- Addition	or 2,500	\$200.00	\$500,000	Permanent Building for Transportation Office	2022	\$67,500
	-	or		\$0			
	Renovation						
	- 20 Year Renovation	or 22,359	\$25.00	\$558,975	20 Year Cycle Renovation	2022	\$75,462
	- Security Vestibule	or		\$0	Not Needed		
	-	or		\$0			
	Site						
	- Grading for New Construction	\$115,000	or	\$115,000	For New Transportation Office	2022	\$15,525
	- Drainage / Erosion	or		\$0			
	- Landscaping / Grassing	or		\$0			
	- Irrigation	or		\$0			
	- Athletic Field(s) / Playground(s)	or		\$0			
	- Athletic / Playground Equipment	or		\$0			
	- Parking Lot(s)	or 100	\$2,250.00	\$225,000	Additional Bus Driver Parking (100 Cars)	2022	\$30,375
	- Parking Lot(s)	or 80,000	\$4.15	\$332,000	Repave Parking Lot	2022	\$44,820
	- Driveway(s) / Turn lane(s)	or		\$0			
	- Sidewalks	or		\$0			
	- ADA	or		\$0			
	- Fencing	or		\$0			
	- Site Lighting	or		\$0	Duke Energy Owned System		
	- Utilities	or		\$0			
	-	or		\$0			
	Building Envelope						
	- Structural	or		\$0			
	- Roof: Low Slope	or		\$0	Replace Office Roof (2017)	2037	\$0
	- Roof: Low Slope	or		\$0	Replace Warehouse Roof (2017)	2037	\$0
	- Roof: Shingle	or		\$0			
	- Exterior Walls	or		\$0			
	- Exterior Doors	or		\$0			
	- Storefronts / Window Walls	or		\$0			
	- Windows	or 5	\$3,000.00	\$15,000	Replace Windows	2022	\$2,025
	-	or		\$0			
	Building Finishes						
	- Flooring: VCT / Vinyl	or		\$0			
	- Flooring: Hard Tile / Terrazzo	or		\$0			
	- Flooring: Sports Flooring	or		\$0			
	- Ceiling: ACT	or		\$0			
	- Ceiling: Other	or		\$0			
	- Walls: Painting	or 43,859	\$1.50	\$65,789	Per 7-Year Cycle (Included in Renovation)	2022	\$8,881
	- Walls: Other	or		\$0			
	- Casework	or		\$0			
	- Interior Doors / Windows	or		\$0			
	- ADA / Code Upgrades	or		\$0			
	- Asbestos Abatement	or		\$0			
	-	or		\$0			
	Building Systems						
	- Food Service	or		\$0			
	- Plumbing	or		\$0			
	- Fire Sprinkler	or		\$0			
	- HVAC	or 6	\$20,000.00	\$120,000	Replace 6 Split Systems, 5 RTUs (Gas)	2022	\$16,200
	- HVAC	\$20,000	or	\$20,000	Install Controls	2022	\$2,700
	- Electrical	or 43,859		\$0	Replace T8s to LED	2022	\$0
	- Electrical	\$35,000	or	\$35,000	Replace Sub Panels	2022	\$4,725
	- Electrical	\$150,000	or	\$150,000	Generator for Data Center	2022	\$20,250
	- Fire Alarm	or 43,859	\$2.50	\$109,648	Full System Replacement - Per 20 Year Cycle	2022	\$14,802
	- Security: Cameras	\$15,000	or	\$15,000	Full System Replacement - Per 6 Year Cycle (Replaced 2012)	2019	\$0
	- Security: Intrusion	\$5,873	or	\$5,873	Full System Replacement - Per 15 Year Cycle	2022	\$793
	- Intercom	\$5,000	or	\$5,000	Head End Replacement - Per 20 Year Cycle	2022	\$675
	- Access Controls	\$10,000	or	\$10,000	Head End Replacement - Per 20 Year Cycle	2022	\$1,350
	Technology						
	- Route / Switch Equipment	or		\$0	Replace - Per 5 Year Cycle		
	- UPS	or		\$0	Replace - Per 5 Year Cycle		
	- Wireless Access Points	or		\$0	Replace - Per 5 Year Cycle		
	- VOIP Phones System	or		\$0	Replace - Per 10 Year Cycle		
	- Data Cabling / Racks	or		\$0	Additional Drops		
	- Classroom A/V	or		\$0	Replace - Per 5 Year Cycle		
	-	or		\$0			
	Facility Improvements Sub Total			\$3,282,284			
	II B Support Costs						
	Prof/Pm/Support Fees	10%		\$328,228		2020	\$14,770
	Survey/Testing	1.5%		\$49,234		2022	\$6,647
	Storage and Moving			\$0			
	City Fees/County			\$0			
	FF&E	3.0%		\$98,469	Allowance - Refresh	2022	\$13,293
	Land Purchase			\$0			
	Contingency	10%		\$328,228		2022	\$44,311
	Support Costs Subtotal			\$804,160			
	Program Subtotal			\$4,086,444			
	Program Escalation			\$520,104			\$520,104
	Program Total			\$4,606,548			



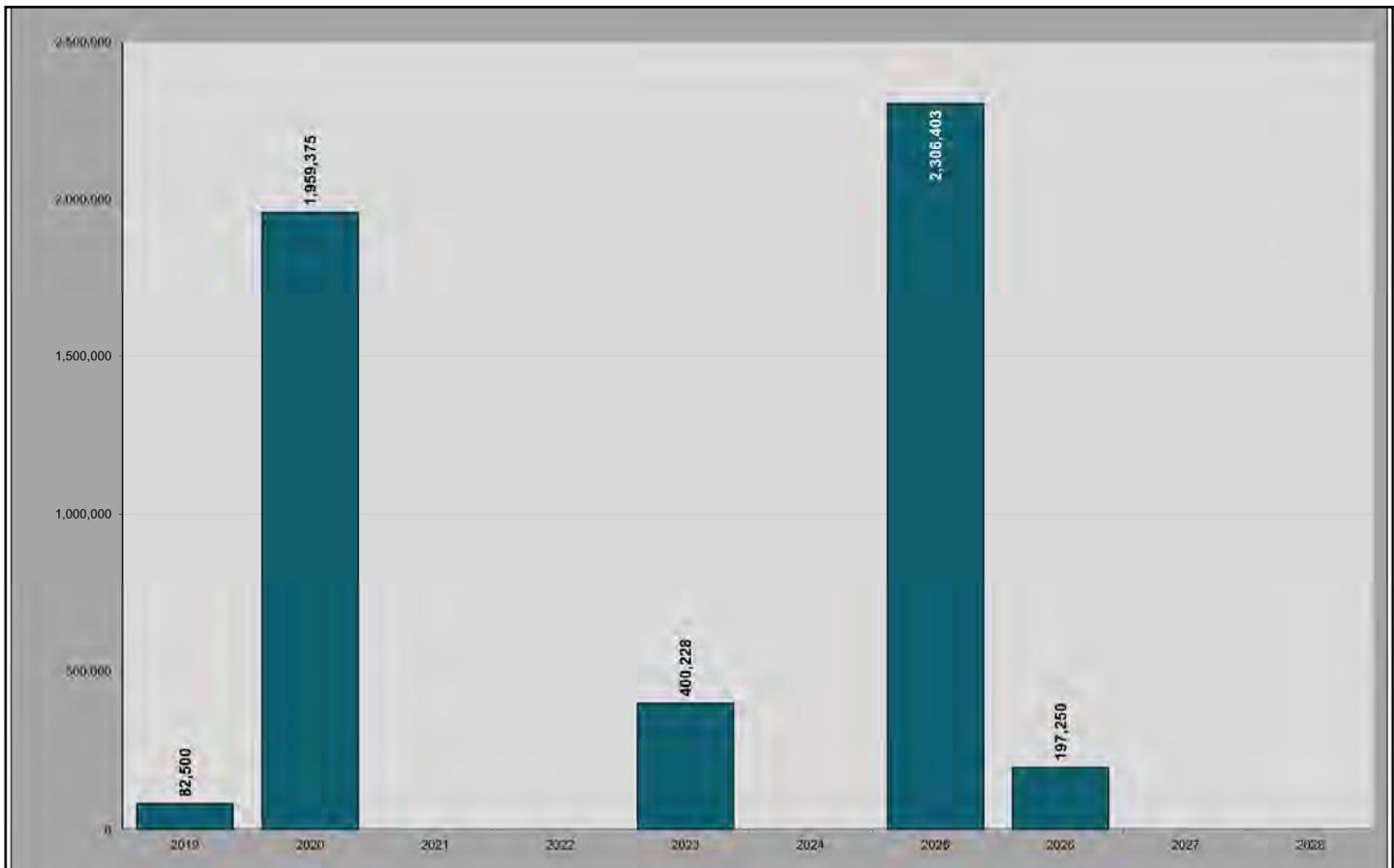
HAMLIN ROAD OPERATIONS

2011 HAMLIN ROAD

School #: 522
Building Size: 37,371 Square Feet
Grade Level: N/A
Year Built: 1976
Site Size: 19.5 Acres

SUMMARY

The Operation Center serves the District's maintenance, Construction Services, bus transportation, as well as other District operation services. The facility was originally constructed in the 1950's and was renovated or added onto in 1992 and 2007. Currently, they facility includes mobile units to house staff and these spaces should be converted to permanent office to help secure the campus. The transportation services will need additions associated with a wash bay and a building to handle maintenance. The facility is due for a 20 year cycle renovation in 2025 as well as other typical maintenance such as HVAC and electrical systems.



Facility Condition Index: .43

New Construction: \$1,983,300

Total Facility Needs: \$4,945,755

Current / Deferred Maintenance: \$2,962,455

Durham Public Schools Capital Improvement Plan			Hamlin Road Operations		522	Summary Sheet	
Category/Description	Campus Program Total		\$ 4,945,755		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A	Facility Improvements:						
	New Construction						
- Addition	or	3,000	\$100.00	\$300,000	Construct Wash Bay (2 Bays), Crew Facilities, & Oil Separator	2020	\$13,500
- Addition	or	2,500	\$200.00	\$500,000	Permanent Building for Transportation Maint. at Bus Lot	2020	\$22,500
- Addition	or	2,400	\$200.00	\$480,000	Office Addition to Replace Mob Units	2025	\$129,600
- Addition	or	\$50,000		\$50,000	Enclose Equipment Storage Bldg.	2025	\$13,500
-	or			\$0			
	Renovation						
- 20 Year Renovation	or	37,371	\$15.00	\$560,565	Renovation of Offices and Restrooms	2025	\$151,353
- Fuel Station Upgrade	or	\$120,000		\$120,000	Upgrade Onsite Fuel Station	2020	\$5,400
- Security Vestibule	or			\$0	Has a Secure Entrance		
-	or			\$0			
	Site						
- Grading for New Construction	or	\$115,000		\$115,000	For Wash Bay / Bus Office / Office Additions	2020	\$5,175
- Drainage / Erosion	or			\$0			
- Landscaping / Grassing	or			\$0			
- Irrigation	or			\$0			
- Athletic Field(s) / Playground(s)	or			\$0			
- Athletic / Playground Equipment	or			\$0			
- Parking Lot(s)	or	\$10,000		\$10,000	Parking Lot Preventative Maintenance - Per 10 Year Cycle	2019	\$0
- Parking Lot(s)	or	25,000	\$24.00	\$600,000	Pave all Gravel Lots	2020	\$27,000
- Driveway(s) / Turn lane(s)	or			\$0			
- Sidewalks	or			\$0			
- ADA	or			\$0			
- Fencing	or	2	\$5,000.00	\$10,000	Add Automatic Operators to Two (2) Gates	2019	\$0
- Site Lighting	or			\$0	Duke Energy Owned System		
- Utilities	or			\$0			
-	or			\$0			
	Building Envelope						
- Structural	or			\$0			
- Roof: Low Slope	or			\$0	Entire Roof Replaced in 2007	2030	\$0
- Roof: Metal	or			\$0			
- Roof: Shingle	or			\$0			
- Exterior Walls	or			\$0			
- Exterior Doors	or			\$0			
- Storefronts / Window Walls	or			\$0			
- Windows	or			\$0			
-	or			\$0			
	Building Finishes						
- Flooring: VCT / Vinyl	or			\$0			
- Flooring: Hard Tile / Terrazzo	or			\$0			
- Flooring: Sports Flooring	or			\$0			
- Ceiling: ACT	or			\$0			
- Walls: Painting	or	37,371	\$1.50	\$56,057	Per 7-Year Cycle (Included in Renovation)	2025	\$15,135
- Casework	or			\$0			
- Interior Doors / Windows	or			\$0			
- ADA / Code Upgrades	or			\$0			
- Asbestos Abatement	or			\$0			
-	or			\$0			
	Building Systems						
- Food Service	or			\$0			
- Plumbing	or			\$0			
- Fire Sprinkler	or			\$0			
- HVAC	or	4	\$15,000.00	\$60,000	Replace 4 RTU Systems	2020	\$2,700
- HVAC	or	\$20,000		\$20,000	Install Controls	2020	\$900
- Electrical	or	\$150,000		\$150,000	Replace District Head End (2016)	2026	\$47,250
- Electrical	or	20,000	\$1.50	\$30,000	Replace T8s to LED	2025	\$8,100
- Electrical	or	\$50,000		\$50,000	Replace Switchgear and Sub Panels	2025	\$13,500
- Electrical	or	\$150,000		\$150,000	Replace 150 kw Generator	2020	\$6,750
- Fire Alarm	or	\$20,000		\$20,000	Full System Replacement - Per 20 Year Cycle	2025	\$5,400
- Security: Cameras	or	\$62,500		\$62,500	Full System Replacement - Per 6 Year Cycle (Replaced 2005)	2019	\$0
- Security: Intrusion	or	\$5,873		\$5,873	Head End Replacement - Per 20 Year Cycle	2025	\$1,586
- Intercom	or	37,371	\$0.85	\$31,765	Head End Replacement - Per 20 Year Cycle	2025	\$8,577
- Access Controls	or	\$10,000		\$10,000	Full System Replacement - Per 15 Year Cycle	2020	\$450
-	or			\$0			
	Technology						
- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle		
- UPS	or			\$0	Replace - Per 5 Year Cycle		
- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle		
- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle		
- Data Cabling / Racks	or			\$0	Additional Drops		
- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle		
-	or			\$0			
	Facility Improvements Sub Total						
				\$3,391,760			
II B	Support Costs						
Prof/Pmi/Support Fees	10%			\$339,176		2023	\$61,052
Survey/Testing	1.50%			\$50,876		2025	\$13,737
Storage and Moving				\$0			
City Fees/County				\$0			
FF&E	3.0%			\$101,753	Misc.	2025	\$27,473
FF&E	\$40,000			\$40,000	Two (2) Shop Lifts for Bus	2025	\$10,800
Land Purchase				\$0			
Contingency	10%			\$339,176		2025	\$91,578
	Support Costs Subtotal						
				\$870,981			
	Program Subtotal						
				\$4,262,741			
	Program Escalation						
				\$683,014			\$683,014
	Program Total						
				\$4,945,755			



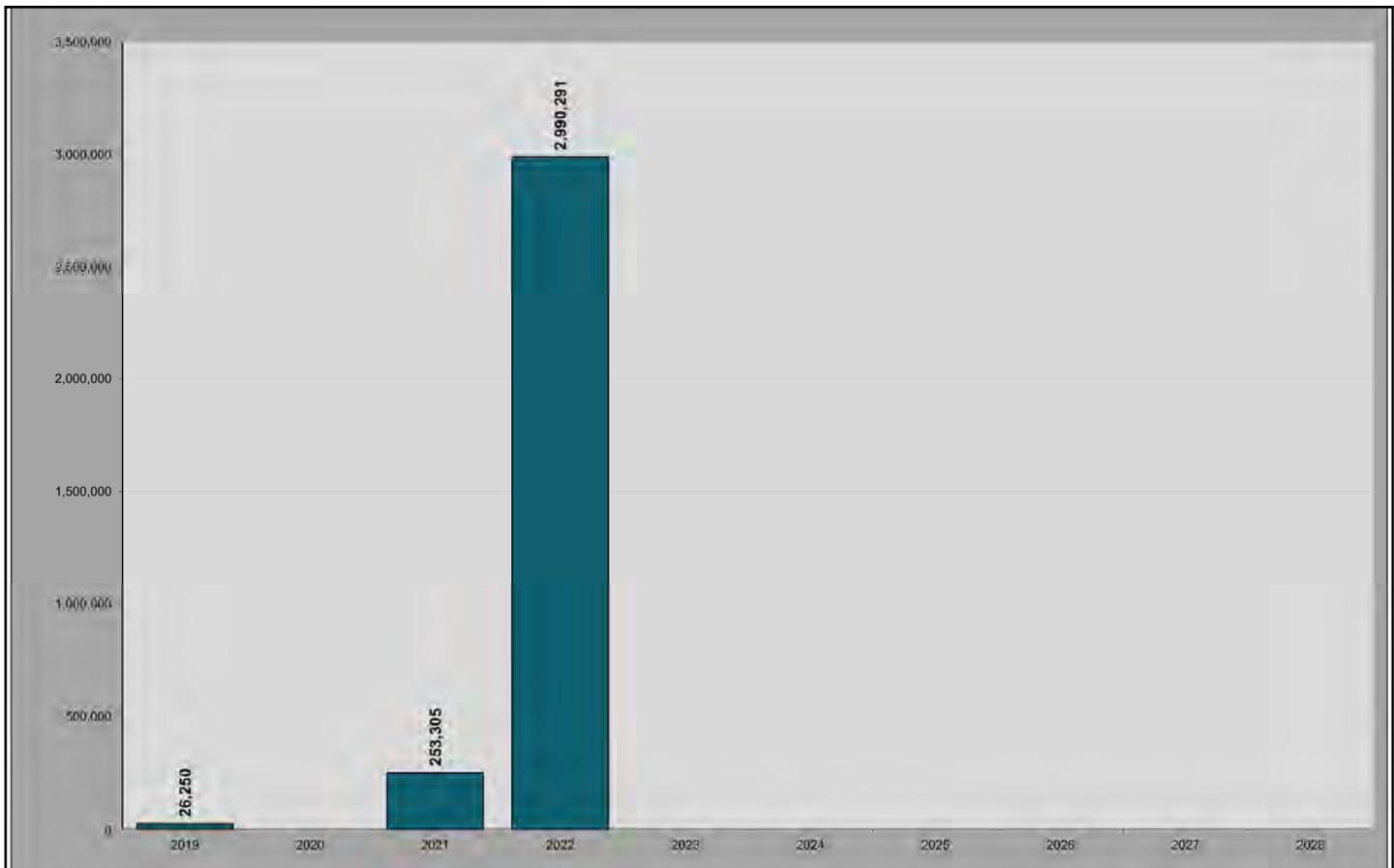
STAFF DEVELOPMENT CENTER

2107 HILLANDALE ROAD

- School #:** 525
- Building Size:** 34,154 Square Feet
- Grade Level:** N/A
- Year Built:** 1985
- Site Size:** 17.0 Acres

SUMMARY

Consideration should be given to selling property and consolidating with District Administration (Bacon Street, Fuller, Staff Development). However, if the District maintains this facility, they should consider improvements to building systems such as HVAC and electrical, as well as a 20 year cycle renovation. Overall, the FCI will rate at critical in 2028 if items are not addressed.



Facility Condition Index: .31

New Construction: \$0

Total Facility Needs: \$3,269,846

Current / Deferred Maintenance: \$3,269,846

Durham Public Schools Capital Improvement Plan			Staff Development Center		808	Summary Sheet	
Category/Description	Campus Program Total		\$ 3,269,846		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A	Facility Improvements:						
	New Construction						
	- Addition	or		\$0			
	-	or		\$0			
	Renovation						
	- Building Renovations	or	34,154	\$35.00	\$1,195,390	Renovate All Buildings	2022 \$161,378
	- Security Vestibule	or			\$70,750	Develop Passive Security at Front Office	2022 \$9,551
	-	or			\$0		
	Site						
	- Grading for New Construction	or			\$0		
	- Drainage / Erosion	or			\$10,000	Allowance: Grade at Left of Facility to Correct Drainage	2019 \$0
	- Drainage / Erosion	or			\$10,000	Allowance: Roof Drainage Issue Between Two Main Bldgs.	2019 \$0
	- Landscaping / Grassing	or			\$5,000	Landscape Refresh	2022 \$675
	- Irrigation	or			\$0		
	- Athletic Field(s) / Playground(s)	or			\$0		
	- Athletic / Playground Equipment	or			\$0		
	- Parking Lot(s)	or	2,200	\$30.00	\$66,000	Pave Gravel Parking Lot	2022 \$8,910
	- Driveway(s) / Turn lane(s)	or	750	\$30.00	\$22,500	Pave Emergency Drive	2022 \$3,038
	- Sidewalks	or			\$0		
	- ADA	or			\$0		
	- Fencing	or			\$0		
	- Site Lighting	or			\$0	Duke Energy Owned System	
	- Utilities	or			\$0		
	-	or			\$0		
	Building Envelope						
	- Structural	or			\$0		
	- Roof: Low Slope	or			\$0	Replace Front & Rear Classroom Bldg., Mech Front, Mech (2019)	2039 \$0
	- Roof: Low Slope	or			\$0	Replace Entire Roof. Main Building Funded for 2014	2034 \$0
	- Roof: Metal	or			\$0	Replace Canopy Roofs Previously Funded	
	- Roof: Shingle	or			\$0		
	- Exterior Walls	or	5,500	\$4.50	\$24,750	Replace Curtain Wall System at Old Classroom and Cafeteria	2022 \$3,341
	- Exterior Doors	or			\$0		
	- Storefronts / Window Walls	or			\$0		
	- Windows	or			\$0		
	-	or			\$0		
	Building Finishes						
	- Flooring: VCT / Vinyl	or			\$0		
	- Flooring: Hard Tile / Terrazzo	or			\$0		
	- Flooring: Sports Flooring	or			\$0		
	- Ceiling: ACT	or			\$0		
	- Ceiling: Other	or			\$0		
	- Walls: Painting	or	34,154	\$1.50	\$51,231	Per 7-Year Cycle (Included in Renovation)	2022 \$6,916
	- Walls: Other	or			\$0		
	- Casework	or			\$0		
	- Interior Doors / Windows	or			\$0		
	- ADA / Code Upgrades	or			\$0		
	- Asbestos Abatement	or	34,154	\$1.40	\$47,816	Asbestos Abatement	2022 \$6,455
	-	or			\$0		
	Building Systems						
	- Food Service	or			\$0		
	- Plumbing	or			\$0		
	- Fire Sprinkler	or			\$0		
	- HVAC	or	34,154	\$16.00	\$546,464	Replace HVAC for Entire Facility	2022 \$73,773
	- HVAC	or	34,154	\$3.00	\$102,462	Replace Controls	2022 \$13,832
	- Electrical	or			\$35,000	Upgrade Service and Replace Switchgear	2022 \$4,725
	- Fire Alarm	or	34,154	\$2.50	\$85,385	Full System Replacement - Per 20 Year Cycle	2022 \$11,527
	- Security: Cameras	or			\$6,250	Full System Replacement - Per 6 Year Cycle (Replaced 2010)	2019 \$0
	- Security: Intrusion	or			\$5,873	Head End Replacement - Per 20 Year Cycle	2022 \$793
	- Intercom	or	34,154	\$0.85	\$29,031	Head End Replacement - Per 20 Year Cycle	2022 \$3,919
	- Access Controls	or			\$10,000	Full System Replacement - Per 15 Year Cycle	2022 \$1,350
	-	or			\$0		
	Technology						
	- Route / Switch Equipment	or			\$0	Replace - Per 5 Year Cycle	
	- UPS	or			\$0	Replace - Per 5 Year Cycle	
	- Wireless Access Points	or			\$0	Replace - Per 5 Year Cycle	
	- VOIP Phones System	or			\$0	Replace - Per 10 Year Cycle	
	- Data Cabling / Racks	or			\$0	Additional Drops	
	- Classroom A/V	or			\$0	Replace - Per 5 Year Cycle	
	-	or			\$0		
	Facility Improvements Sub Total				\$2,323,902		
II B	Support Costs						
	Prof/Pmi/Support Fees		10%		\$232,390		2021 \$20,915
	Survey/Testing		1.5%		\$34,859		2022 \$4,706
	Storage and Moving				\$0		
	City Fees/County				\$0		
	FF&E		3.0%		\$69,717	Allowance - Refresh +/- 1/3 Furniture - (15 Year Cycle)	2022 \$9,412
	Land Purchase				\$0		
	Contingency		10%		\$232,390		2022 \$31,373
	Support Costs Subtotal				\$569,356		
	Program Subtotal				\$2,893,257		
	Program Escalation				\$376,588		\$376,588
	Program Total				\$3,269,846		



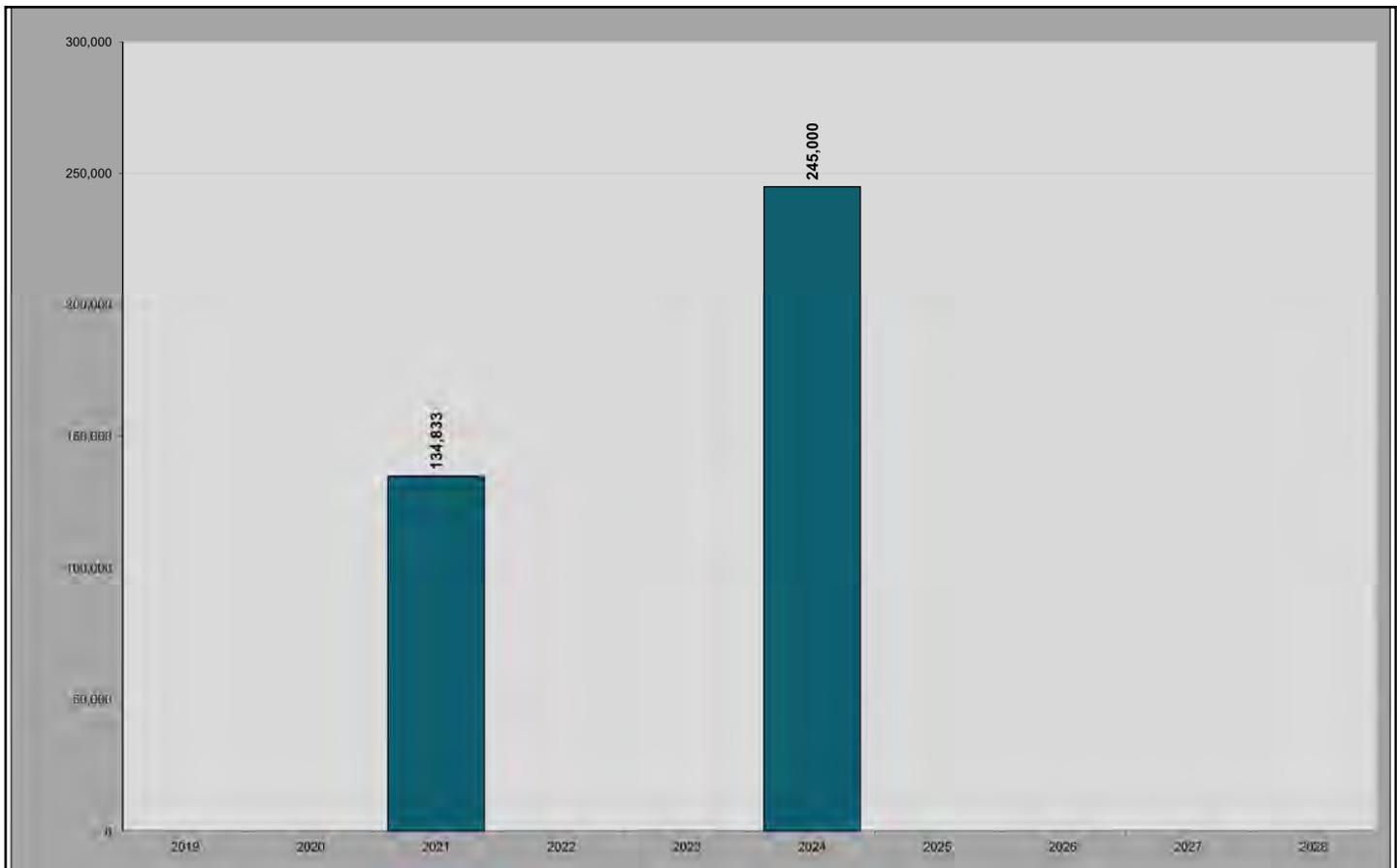
HUB FARM

117 MILTON ROAD

School #: N/A
Building Size: N/A
Grade Level: N/A
Year Built: N/A
Site Size: 62.2 Acres

SUMMARY

Hub Farm is located on the Eno Valley ES campus and over the next ten years will need a new greenhouse as well as various upgrades based on a master plan.



Facility Condition Index: N/A

New Construction: \$374,100

Total Facility Needs: \$379,833

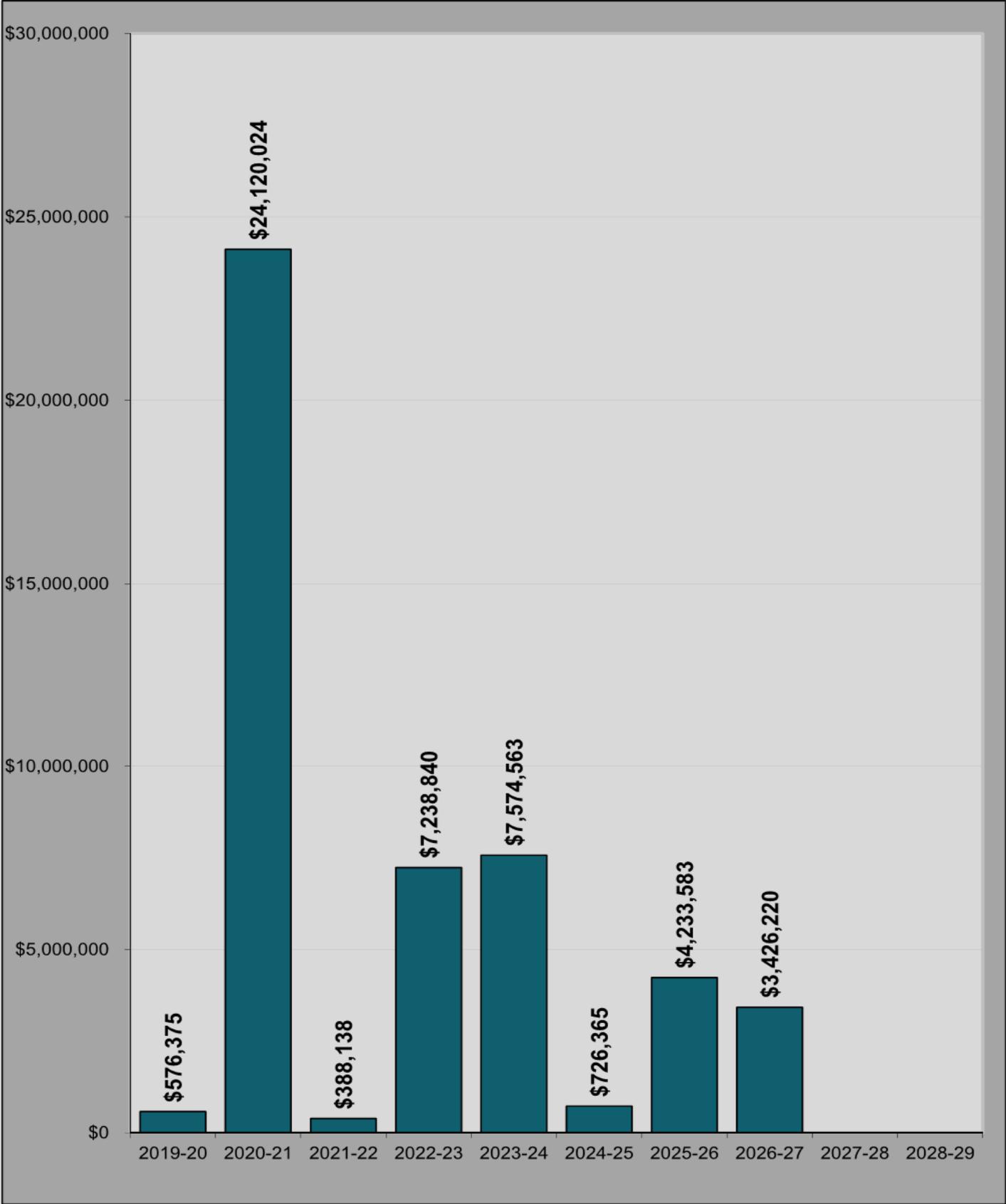
Current / Deferred Maintenance: \$5,733

Durham Public Schools Capital Improvement Plan			Hub Farm		0	Summary Sheet	
Category/Description	Campus Program Total		\$ 379,833		Comments	Year Required	Escalation
	Lump Sum	Unit	Cost/Unit	Cost Estimate			
I A	Facility Improvements:						
	New Construction						
	- Addition	\$60,000	or	\$60,000	New Greenhouse	2021	\$5,400
	- Addition	\$200,000	or	\$200,000	Misc. Campus Upgrades	2024	\$45,000
	- Canopies		or	\$0			
	-		or	\$0			
	Renovation						
	- Building Renovations		or	\$0			
	- Security Vestibule		or	\$0			
	-		or	\$0			
	Site						
	- Grading for New Construction		or	\$0			
	- Drainage / Erosion		or	\$0			
	- Landscaping / Grassing		or	\$0			
	- Irrigation		or	\$0			
	- Athletic Field(s) / Playground(s)		or	\$0			
	- Athletic / Playground Equipment		or	\$0			
	- Parking Lot(s)		or	\$0			
	- Driveway(s) / Turn lane(s)		or	\$0			
	- Sidewalks		or	\$0			
	- ADA		or	\$0			
	- Fencing		or	\$0			
	- Site Lighting		or	\$0			
	- Utilities		or	\$0			
	-		or	\$0			
	Building Envelope						
	- Structural		or	\$0			
	- Roof: Low Slope		or	\$0			
	- Roof: Metal		or	\$0			
	- Roof: Shingle		or	\$0			
	- Exterior Walls		or	\$0			
	- Exterior Doors		or	\$0			
	- Storefronts / Window Walls		or	\$0			
	- Windows		or	\$0			
	-		or	\$0			
	Building Finishes						
	- Flooring: VCT / Vinyl		or	\$0			
	- Flooring: Hard Tile / Terrazzo		or	\$0			
	- Flooring: Sports Flooring		or	\$0			
	- Ceiling: ACT		or	\$0			
	- Ceiling: Other		or	\$0			
	- Walls: Painting		or	\$0			
	- Walls: Other		or	\$0			
	- Casework		or	\$0			
	- Interior Doors / Windows		or	\$0			
	- ADA / Code Upgrades		or	\$0			
	- Asbestos Abatement		or	\$0			
	-		or	\$0			
	Building Systems						
	- Food Service		or	\$0			
	- Plumbing		or	\$0			
	- Fire Sprinkler		or	\$0			
	- HVAC		or	\$0			
	- Electrical		or	\$0			
	- Fire Alarm		or	\$0			
	- Security: Cameras		or	\$0			
	- Security: Intrusion		or	\$0			
	- Intercom		or	\$0			
	- Access Controls		or	\$0			
	Technology						
	- Route / Switch Equipment		or	\$0			
	- UPS		or	\$0			
	- Wireless Access Points		or	\$0			
	- VOIP Phones System		or	\$0			
	- Data Cabling / Racks		or	\$0			
	- Classroom A/V		or	\$0			
	-		or	\$0			
	Facility Improvements Sub Total			\$260,000			
II B	Support Costs						
	Prof/Pm/Support Fees	10%		\$26,000		2021	\$2,340
	Survey/Testing	1.5%		\$3,900		2021	\$351
	Storage and Moving			\$0			
	City Fees/County			\$0			
	FF&E	3.0%		\$7,800	Allowance - Refresh	2021	\$702
	Land Purchase			\$0			
	Contingency	10%		\$26,000		2021	\$2,340
	Support Costs Subtotal			\$63,700			
	Program Subtotal			\$323,700			
	Program Escalation			\$56,133			\$56,133
	Program Total			\$379,833			

DISTRICT TECHNOLOGY COSTS

Durham Public Schools		Capital Improvement Plan		Technology		0	Summary Sheet		
Category/Description		Campus Program Total		\$ 28,914,959		Comments	Year Required	Escalation	
		Lump Sum	Unit	Cost/Unit	Cost Estimate				
I A	Facility Improvements								
	New Construction								
	- Canopies		or		\$0				
	-		or		\$0				
	Renovation								
	- Building Renovations		or		\$0				
	- Security Vestibule		or		\$0				
	-		or		\$0				
	Site								
	- Grading for New Construction		or		\$0				
	- Drainage / Erosion		or		\$0				
	- Landscaping / Grassing		or		\$0				
	- Irrigation		or		\$0				
	- Athletic Field(s) / Playground(s)		or		\$0				
	- Athletic / Playground Equipment		or		\$0				
	- Parking Lot(s)		or		\$0				
	- Driveway(s) / Turn lane(s)		or		\$0				
	- Sidewalks		or		\$0				
	- ADA		or		\$0				
	- Fencing		or		\$0				
	- Site Lighting		or		\$0				
	- Utilities		or		\$0				
	-		or		\$0				
	Building Envelope								
	- Structural		or		\$0				
	- Roof: Low Slope		or		\$0				
	- Roof: Low Slope		or		\$0				
	- Roof: Metal		or		\$0				
	- Roof: Shingle		or		\$0				
	- Exterior Walls		or		\$0				
	- Exterior Doors		or		\$0				
	- Storefronts / Window Walls		or		\$0				
	- Windows		or		\$0				
	-		or		\$0				
	Building Finishes								
	- Flooring: VCT / Vinyl		or		\$0				
	- Flooring: Hard Tile / Terrazzo		or		\$0				
	- Flooring: Sports Flooring		or		\$0				
	- Ceiling: ACT		or		\$0				
	- Ceiling: Other		or		\$0				
	- Walls: Painting		or		\$0				
	- Walls: Other		or		\$0				
	- Casework		or		\$0				
	- Interior Doors / Windows		or		\$0				
	- ADA / Code Upgrades		or		\$0				
	- Asbestos Abatement		or		\$0				
	-		or		\$0				
	Building Systems								
	- Food Service		or		\$0				
	- Plumbing		or		\$0				
	- Fire Sprinkler		or		\$0				
	- HVAC		or		\$0				
	- HVAC		or	174	\$2,500.00	\$435,000	Data Closets in District	2019	\$0
	- Electrical		or		\$0				
	- Electrical		or		\$0				
	- Fire Alarm		or		\$0				
	- Security: Cameras		or		\$0				
	- Security: Intrusion		or		\$0				
	- Intercom		or		\$0				
	- Access Controls		or		\$0				
	Technology								
	- Router / Switch Equipment		or	1,368	\$9,000.00	\$12,312,000	Replace - Per 5 Year Cycle	2019	\$0
	- UPS		or	342	\$1,500.00	\$513,000	Replace - Per 5 Year Cycle	2019	\$0
	- Wireless Access Points		or	3,000	\$1,333.50	\$4,000,500	Replace - Per 5 Year Cycle	2019	\$0
	- VOIP Phones System		or	4,850	\$255.64	\$1,239,854	Replace - Per 10 Year Cycle	2019	\$0
	- Data Cabling / Racks		or	290	\$2,413.80	\$700,002	Racks	2019	\$0
	- Classroom A/V		or	400	\$3,010.00	\$1,204,000	Replace - Per 5 Year Cycle (Replace 450 & 455 Units)	2019	\$0
	- Classroom A/V		or	2,100	\$3,010.00	\$6,321,000	Replace - Per 5 Year Cycle	2022	\$853,335
			or			\$0			
	Facility Improvements Sub Total					\$26,725,356			
II B	Support Costs								
	Prof/Pm/Support Fees				\$0			2019	\$0
	Survey/Testing				\$0				
	Storage and Moving				\$0				
	City Fees/County				\$0				
	FF&E				\$0				
	Land Purchase				\$0				
	Contingency	5%				\$1,336,268		2019	\$0
	Support Costs Subtotal					\$1,336,268			
	Program Subtotal					\$28,061,624			
	Program Escalation					\$853,335			\$853,335
	Program Total					\$28,914,959			

CENTRAL SERVICES CONSTRUCTION COST



\$48,284,109



DURHAM

PUBLIC SCHOOLS

GLOSSARY

The following information is provided for the convenience of the reader to define the terms used in the document. It should facilitate the understanding of each category description used on the facility update sheets as well as the standard definition of common language used in operational services of Durham Public Schools

20 Year Renovation:	After 20 years, school buildings are typically in need of a cosmetic refresh as many of the finishes have reached their life cycle. This work includes new ceilings, new floor coverings, painting, and casework replacement.
Abatement:	The removal of existing asbestos, lead based paint, and silica containing materials which has been identified and remains encapsulated in good condition but may be disturbed by construction activity.
ADA/Life Safety:	Indicates an amount necessary to bring the existing facility into compliance with the Americans with Disabilities Act of 1991 and its revisions. Normally included in renovation cost, there may be exceptions where the complexity of the accessibility requirements can not be accommodated by renovation cost alone. In such cases they are included in the spreadsheets in addition to renovation cost. Examples of Miscellaneous Items include: Door Hardware, Sidewalks, Ramps, Toilet Accessories, etc.
Additions:	The addition of new gross square footage necessary to accommodate growth or change in curriculum.
Athletic Components:	Associated with the upgrade of athletic fields in the secondary level. Life-cycle and functionality related.
City/County fees:	All fees associated with the city and county to complete the work. Example: Impact fees; planning submittal fees; and associated environmental and review fees.
Civil/Site Improvement:	Exterior improvement necessary to satisfy either a code, transportation, drainage, athletic or paving issues.
Code upgrades:	Normally stand-alone items which occurs in a facility where major renovation will not occur but existing life safety or accessibility features must be updated to comply with current code requirements.
Contingency:	Percentage amount related to the construction contract used for changes related to items not previously identified during design.
Electrical:	Replacement of lighting/outlets/switches/panels/breakers that that exceed the life-cycle or code requirements. Life safety issue compliance.
FCI:	The Facility Condition Index (FCI) is a standard facility management benchmark that is used to objectively assess the current and projected condition of a building asset. An FCI approaching 60% indicates that a building should be considered for replacement. Good – 0.0 to .05 Fair – .05 to .1 Poor – .1 to .3 Critical – Greater than .3

FF & E:	The cost of furniture, fixed assets and equipment.
Fire Alarm Systems:	Upgrade or replacement of the campus fire system to meet the changing life safety policy of the fire codes.
Flooring:	Replacement of vinyl or carpet based on life-cycle and life safety.
Hardware/Locks:	Replacement of existing door handles/locking mechanism/panic bar devices/door hinges that exceed life-cycle or code requirements.
Head End:	Master Control components for receiving, processing, and distribution for Data / Fire Alarm / Telephone / Security systems.
HVAC:	“Heat Ventilation Air Condition” system. Replacement of chillers and boilers and/or all duct work and controls.
Inflation:	The estimate value of increase cost over time.
Intercom:	Related to the communication network infrastructure of the campus.
Kitchen upgrade:	Equipment such as cooler/freezers and dish machines that have run their life cycle and need to be replaced. These are fixed asset items stationary to the building and not part of the child nutrition program.
Land Purchase:	Related to the purchase of land only.
New Construction:	Area in gross square feet necessary to comply with district-adopted educational specifications. Cost per square foot includes the cost to build a new structure, but does not include cost of land, furnishings, technology and project supported expenditures, which are accounted for in the summary of this document.
Painting:	Over the life cycle of a campus, the interior structure needs to be revitalized between the refurbish and renovation stages of the district master plan.
Playgrounds:	Replacement of playground equipment. All replacements are related to health/safety compliance and curriculum needs.
Plumbing:	Replacement of sanitary waste and water management devices due to code requirements or life safety compliance. Toilets/sinks/piping and drinking fountains not addressed in code compliance section.
Prof/PM/Support:	Professional: Architectural Design & Engineering fees excluding flow-through costs and other consultant fees not under the Design contract. PM: District cost for the operational management of the Bond Program. Contingency: Owner’s contingency. Retained by the owner to cover any changes in program scope. Not related to construction contingency.
Refresh:	Update of the Technology systems to current standards

Renovation:	An interior demolition and rebuilding of an existing space to meet compliance issues based on district-adopted specifications as well as Department of Instruction and other federal, state and local codes and ordinances associated with life safety and accessibility issues.
Roof Replacement:	Replacement of roof systems or components based on DPS life-cycle schedule and or system failure beyond repair.
Security:	An estimated amount required to expand the surveillance systems required to maintain a secure campus.
Storage/Moving:	Renovation of occupied facilities require storage and movement of fixed assets before, during and at closeout.
Structural:	Repair or replacement of aging or damaged structural issues such as concrete slab slippage/wall cracking/building shifting or alignment.
Support Cost:	Soft cost not directly associated with the actual construction but directly related to the overall budget expenditures to complete the program.
Survey/Testing:	Owner provided fees not related to the design contract or any other consultant or construction contract. Misc. support cost.
Technology Systems:	Technology system replacement as identified by the Districts IT Department. Includes routers, switches, UPS system, wireless access points, VOIP phone systems, data cabling, racks, and classroom AV. Does not include the purchasing of computers/printers and software.
Upgrade:	Replacement of outdated or improperly functioning equipment

OREd REPORT - EXHIBIT A

Durham Public Schools Enrollment Forecast: Research Approach, Results and DPS Recommendations

Prepared by:
School Planning & Transportation at NCSU ITRE

Prepared for: Durham Public Schools
Dr. Pascal Mubenga, Superintendent
Mr. Aaron Beaulieu, Chief Operations Officer
Ms. Donna Hudson, Director of Student Assignment

Introduction

The long-range, integrated planning for schools in communities involves the synthesis of data from coordinated operational services - facilities, enrollment, and transportation. These operational services function within neighborhood, municipal, regional and state regulation, finance and politics. The greater the coordination, the more likely that communities and schools plan together for sustained, equitable growth.

In 2018, Durham Public Schools (DPS) contracted with the Operations Research and Education Laboratory at NCSU ITRE (OREd) to project student enrollment trends over the next 10 years, until 2028. Pursuant to this deliverable, OREd has collected and analyzed the requisite data and information to answer the question, (Q1) *What are the student enrollment trends, opportunities and problems that Durham Public Schools (DPS) is facing in the next 10 years?*

Report Outline

1. **Durham Land Use Study and the DPS Residential Development Inventory**
 - a. Table 1: Residential Development Inventory - Approved Single Family Detached Projects Larger than 50 Units
 - b. Table 2: Residential Development Inventory - Townhome Projects Larger than 100 Units
 - c. Table 3: Residential Development Inventory - Multifamily and Mixed Use Projects
 - d. Image 1: Geographic Information System (GIS) Analysis of Durham Developments
2. **Durham Public Schools 10-Year Student Enrollment Forecast**
 - a. Figure 1: Student Enrollment Project Model over 10-Year Period (2019-2029)
 - b. Image 2: Student Population Change by Student Residence Elementary Zone (2013-14 / 2018-19)
 - c. Image 3: Charter Student Enrollment Percentages within Durham County
3. **Facility Utilization Analysis**
 - a. Image 4: Facility Capacity Table embedded with Project Student Enrollment
4. **Recommended Next Steps: A Research Road Map**

Overview of Integrated Student Enrollment Planning for Schools and Communities

Integrated Planning for Schools and Communities (IPSAC) is a suite of student enrollment tools and practices designed to assist decision makers in the student enrollment planning process. The IPSAC is a product of the Operations Research and Education Laboratory, located at the Institute for Transportation Research and Education on Centennial Campus at North Carolina State University. The planning system has been featured in numerous professional journals, newspapers, and media broadcasts.

Often the IPSAC workflow culminates with optimal school sites and/or optimal attendance zones, but it is important to acknowledge the process begins with a deep understanding of the student population trends occurring within the district. This “ground-truthing” of student enrollment can only occur by spending time in the district and learning from practitioners: the planning and other professionals with institutional knowledge about new residential developments, utilities infrastructure upgrades, transportation improvements, and other factors which influence school enrollments. At the beginning of the IPSAC process OREd captures this critical information by conducting comprehensive Land Use Studies.

1. Durham Land Use Study and the DPS Residential Development Inventory

The Durham Land Use Study includes two components: community interviews and geographic information systems (GIS) analysis. Collectively, these components form the DPS Residential Development Inventory. For Durham Public Schools (DPS), all analyses presented in this document are based on information gathered by the Land Use Study conducted in the fall of 2018. The purpose of the community interviews is to capture stakeholders’ knowledge and perceptions of key trend indicators, factors encouraging growth, factors constraining growth, and transportation and water/sewer issues that may impact residential and non-residential developments. A critical task of the community interviews is to locate and identify all new and planned residential subdivisions.

In this project, Durham City and County Planning Department were the central informants to planned and expected residential growth for the area of Durham’s student enrollment jurisdiction. Through multiple in-person interviews in the fall of 2018, City/County Planning staff shared the size, location and anticipated build out for 113 residential projects in either the City or County of Durham. In total, there are over 14,000 units projected to be built in Durham over the next decade.

Note: The development data provided during the land use interviews in fall of 2018 were a moment-in-time review of approved projects in the City and County of Durham. With access to multiple sources of water, proximity to three interstates, the state’s largest employer in Duke University, a supportive partnership with the Research Triangle Park, and a long history of agricultural land, Durham’s residential growth and development may not be limited to those projects that were submitted, reviewed and approved in the fall of 2018.

Research Need: Consistent Durham City-County residential development monitoring and tracking; Analysis of residential project influence on when and where changes in Durham Public School student enrollment are likely to occur; Annual updates to the DPS Student Enrollment Forecast based on annual average daily membership data (ADM) and residential development progress.

Table 1: Approved Single Family Detached Residential Projects Larger than 50 Units

Source: Durham Planning Department Interviews, Fall 2018

Project Name	Development Tier	Units	Begin Build	Build Out
Creekside at Bethpage	Suburban	654	2017	2019
751 South Phase 1	Suburban	402	2021	2022
Ellis Road Phase 2	Suburban	340	2018	2019
Magnolia Place	Suburban	221	2019	2021
Andrew's Chapel	Suburban	180	2019	2020
Yancey Parcel	Suburban	149	2019	2020
Copley Farm Subdivision	Suburban	143	-	-
Sagewood Subdivision	Suburban	139	-	-
Courtyards at Andrews Chapel	Suburban	117	2018	2025
Garrett and Pickett Residential	Suburban	99	2018	2019
Sherron Road Tract Ph. 8 and 9	Suburban	96	2018	2021
Sherron Road Tract	Suburban	93	2018	2022
823 Belgreen Road	Suburban	90	-	-
Nichols Farm	Suburban	80	2019	2022
Fletchers Mill	Suburban	68	-	-
Brightleaf at the Park Tract 12	Suburban	62	2019	2024
The Meadows at Colony Park	Suburban	60	-	-
Grandin Trace	Suburban	52	2018	2021

Table 2: Approved Townhome Residential Projects Larger than 100 Units

Source: Durham Planning Department Interviews, Fall 2018

Project Name	Development Tier	Units	Begin Build	Build Out
Ellis Road - Phase 4	Suburban	254	-	-
Andrew's Chapel Townhomes	Suburban	231	2018	2019
Trilogy at Brier Creek	Compact-Neighbor	190	2019	2023
Davis Park Townhomes	Compact-Neighbor	181	-	-
Southern Pointe Townes	Suburban	176	-	-
Meadows at Southpoint	Suburban	175	2020	2022
Meadows North	Suburban	175	2019	2023
Shepards Square	Urban	160	-	-
TW Alexander Townhomes	Suburban	154	-	-
Southpoint Trails	Suburban	149	2018	2019
Creekside Commons	Suburban	132	-	-
Page Square Townhomes	Suburban	130	2018	2018
Page Park Townhomes	Suburban	114	2019	2021
Meridian Townhomes	Suburban	111	2018	2020
539 Foster Street Townhomes	Downtown	101	2019	2021

Table 3: Approved Multifamily and Mixed Use Residential Projects

Source: Durham Planning Department Interviews, Fall 2018

Typology	Project Name	Development Tier	Units	Begin Build	Build Out
Apartments	Van Alen	Downtown	408	2018	2019
Apartments	Davis Park East	Compact-Neighbor	402	2018	2018
Apartments	Solis Patterson Place Apartments	Compact-Neighbor	347	2018	2019
Apartments	600 Willard Street	Downtown	340	2018	2020
Apartments	Palladian Apartments	Suburban	298	2020	2025
Apartments	Farrington Road Mixed Use	Compact-Neighbor	298	-	-
Apartments	The Lodge at Croasdaile Farm	Suburban	288	2019	2024
Apartments	NC 54 Apartments	Suburban	288	2021	2026
Apartments	Magnolia Place Apartments	Suburban	212	2020	2022
Apartments	Solis Brightleaf	Downtown	200	-	-
Apartments	Foster on the Park	Downtown	164	2019	2024
Apartments	Woodstone II at Croasdaile Farm	Urban	144	2019	2021
Mixed Use	City Center	Downtown	132	2019	2020
Multi Family	Bethpage Village Multifamily	Suburban	510	2018	2022
Multi Family	Ellis Road Phase 1	Urban	336	2020	2022
Multi Family	South Square Mixed-Use Project	Compact-Neighbor	263	2019	2020
Multi Family	Highland Park Subdivision	Suburban	220	2021	2023
Multi Family	Lakeview Villas	Urban	126	2018	2020

Geographic Information System (GIS) Analysis of Durham Developments

A spatial analysis based on GIS parcel data provides quantitative data concerning available parcels and subdivisions lots that can be used to identify areas of future growth. The information from Durham planning and development provides a growth modifier for the student generation ratios of land parcels impacted by the conversion to a new residential use. As of Fall 2018, half of all development activity in Durham City and County is clustered in the two southeast elementary attendance zones.

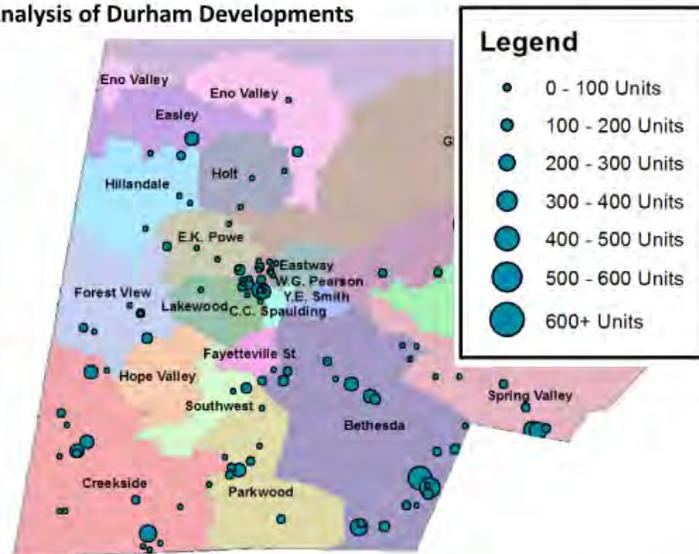


Image 1: Geolocation of Durham Residential Development Projects
Source: Operations Research / Education Lab (OREd), Fall 2018

2. Durham Public Schools 10-Year Student Enrollment Forecast

The System-wide Membership Forecast produces a 10-year student population forecast by synthesizing historical membership data, resident live birth trends, and macro-economic and demographic trends. This forecast, presented in *Figure 1*, yields a broad sense of growth/loss dynamics within the district and may be used to analyze characteristics of specific cohorts within the system.

Figure 1: Student Enrollment Project Model over 10-Year Period (2019-2029)

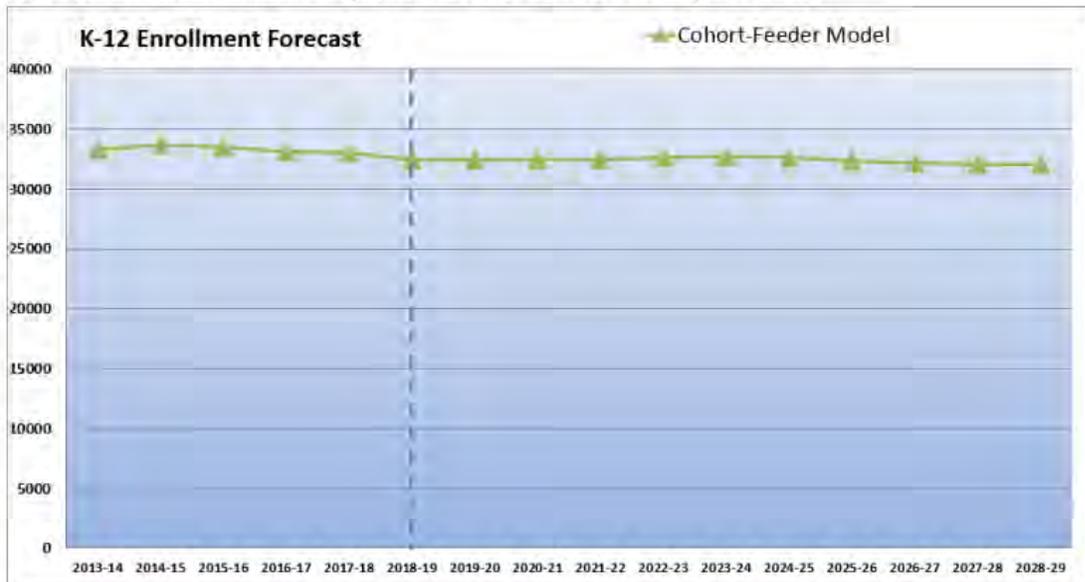
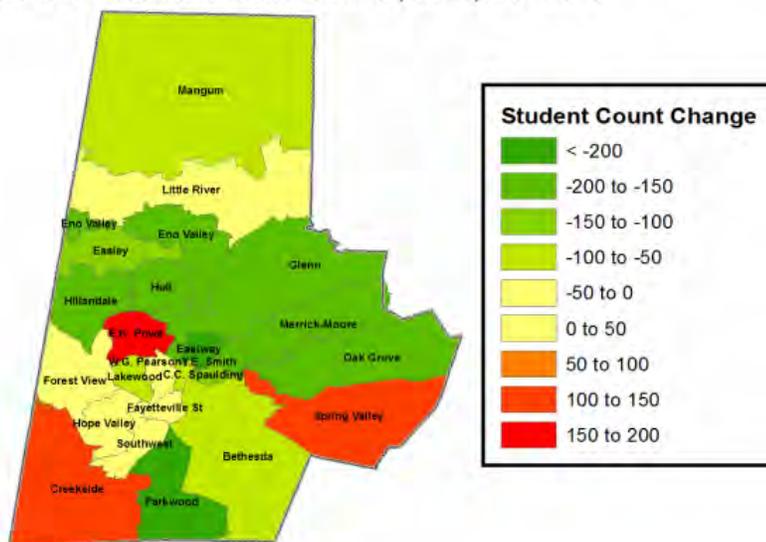


Image 2: Student Population Change by Student Residence Elementary Zone (2013-14 to 2018-19)

Source: Operations Research / Education Lab (OREd), Fall 2018

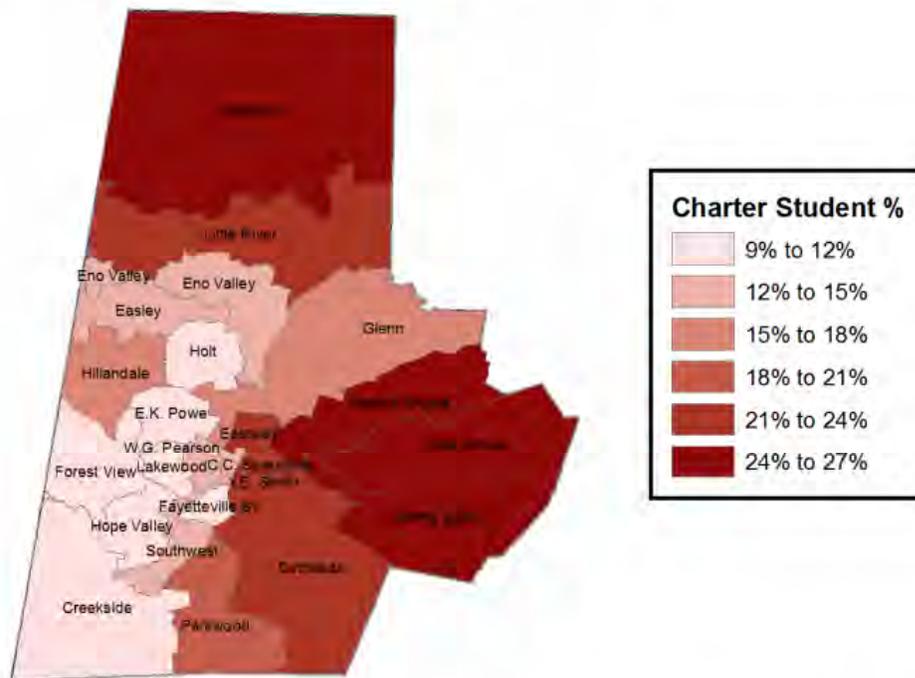


Charter Student Enrollment Analysis

Of relevance to Durham Public Schools, much of the projected development is located in southeastern Durham County, which is presently an area of high charter student enrollment ratios. Notably, Bethesda Elementary and Spring Valley Elementary enrollment areas have high charter percentages. *Image 3* presents this spatial enrollment information.

Image 3: Charter Student Enrollment Percentages within Durham County

Source: Operations Research / Education Lab (OREd), Fall 2018



Research Need: The areas of Durham City and County with elevated levels of charter student enrollment percentages appear at the 15% threshold and beyond. Two questions emerge out of this analysis:

Question 2, Why are families choosing charter schools?, and **Question 3, Which factors predict charter school choice?.**

In addition to the relative percentages of charter enrollment to public school enrollment, Durham has a larger district-level public school student recruitment and retention objective – how to increase public school choice levels to those of comparable school districts in Orange County, Chapel Hill-Carrboro, and Wake County.

3. Facility Utilization Analysis

OREd researchers are experts in applying operations research (O.R.) methods to long-range facility planning decisions for school districts across North Carolina (Ed). Similarly, Durham Public School's Board of Education and District leadership are the experts on Durham Public Schools' students and schools. As such, the generation of facility utilization analysis for Durham Public Schools is necessarily an on-going dialog between OREd and the school district leadership. School building capacities, for example, should incorporate any specific programming and curricular needs required by the district's students in line with the district's goal of ensuring the best educational opportunities possible for all students.

The OREd Out-of-Capacity (OOC) Tables presented (*below in Image 4*) provide a 10-year school-level forecast and are a quick visual way of understanding where the most immediate facility needs exist and where they are forecasted to exist in the future based on enrollment forecasting and school-level capacities.

Working from left to right, the OOC Table starts with building capacities provided by Durham Public Schools' staff. From there school-level observed membership data and forecasted enrollment are colored based on the extent to which each school is below, near, or above its capacity. This enrollment projection spans a ten year school district time horizon. The OOC's coloring and number of forecasted students provides district leaders with information on the magnitude to which certain schools are underutilized or overcrowded over a ten year window.

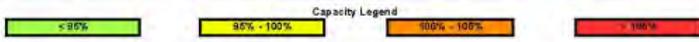
Note: The Out-of-Capacity Table and Facility Utilization Analysis includes information on student forecasted time-series data and the school-level based on reported capacity information. This analysis does not factor in facility age, condition, or need for maintenance and repair.

Research Need: Durham Public Schools has a variety of school enrollment policies and boundaries which inform the size and geography of student enrollment in the City and County of Durham. Over half of all Durham Public School facilities may be tied to a unique magnet curriculum orientation, year-round calendar options, and/or a priority enrollment and lottery system for student assignment.

Compounding the complexity of enrollment and facility decisions, many of Durham's school facilities vary by age, condition, and proximity to residential developments and school-aged families. Consideration of why families are choosing charter schools (**Q2**) and which factors predict charter school choice (**Q3**) leads to **Question 4**, *What can be done through operations (facilities, student enrollment and transportation) to address the issue of declining enrollment?*

Image 4: Facility Capacity Table embedded with Project Student Enrollment
 Source: Operations Research / Education Lab (OREd), Fall 2018

Durham Public Schools Out-of-Capacity Table												
<small> 1 2018-19 Month-1 ADM provided by NC DPI 2 Capacities provided by Durham Public Schools (11/1/2015), (middle units /2) (6/6/65) 3 *** Indicates lottery magnet school </small>												
	Capacities	Month-1	Forecasted Month-1 ADM									
	2018-19	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Elementary Schools												
Bethesda Elementary	684	653	686	714	730	752	782	821	877	920	971	1030
Burton Elementary***	396	350	350	350	350	350	350	350	350	350	350	350
Eastway Elementary	496	503	460	432	416	397	381	373	371	373	374	378
Easley Elementary (Year Round)	499	503	466	468	447	442	433	426	424	426	427	431
Eno Valley Elementary	599	445	415	399	386	384	373	373	370	372	373	377
Club Boulevard Elementary***	444	462	462	462	462	462	462	462	462	462	462	462
Creekside Elementary	686	557	573	591	596	623	647	663	647	562	564	564
Glenn Elementary	538	637	606	574	535	512	501	497	494	496	497	502
Hilandale Elementary	636	594	566	548	526	518	501	518	513	515	517	522
Hope Valley Elementary	575	652	644	632	646	643	660	621	618	620	621	621
Hoff Elementary (Year Round)	619	650	639	634	633	630	627	615	612	614	616	622
Forest View Elementary	669	734	748	755	756	751	720	718	718	733	715	721
Lakewood Elementary	351	389	357	340	310	292	290	283	281	282	283	286
Little River (K-8)	640	495	517	522	530	537	547	555	553	564	560	561
Fayetteville Street Elementary	308	265	250	243	238	223	221	221	219	220	221	223
George Watts Elementary***	293	329	329	329	329	329	329	329	329	329	329	329
Mangum Elementary	324	321	326	326	314	324	330	320	318	319	320	323
Merrick-Moore Elementary	619	621	597	563	534	531	519	504	500	502	504	509
Morehead Montessori***	214	223	223	223	223	223	223	223	223	223	223	223
Oak Grove Elementary	629	534	502	471	448	427	429	423	421	423	424	428
Parkwood Elementary	593	546	544	550	551	549	552	540	536	539	540	545
E K Pove Elementary	509	492	498	481	466	460	441	419	416	418	419	423
Pearsontown Elementary (Year Round)***	772	796	796	796	796	796	796	796	796	796	796	796
R N Harris Elementary***	376	329	329	329	329	329	329	329	329	329	329	329
Sandy Ridge Elementary***	555	554	554	554	554	554	554	554	554	554	554	554
Southwest Elementary	593	602	592	574	581	572	567	569	565	568	569	575
C C Spaulding Elementary	308	245	247	236	223	224	226	230	229	230	230	233
Spring Valley Elementary	642	595	604	623	709	778	754	793	796	789	795	796
W G Pearson Elementary***	479	430	430	430	430	430	430	430	430	430	430	430
Y E Smith Elementary	358	309	294	270	262	254	256	259	258	259	260	263
Totals	15394	15145	14939	14736	14598	14545	14527	14509	14437	14497	14520	14625
Middle Schools												
Brogden Middle	872	515	560	579	621	588	593	565	561	532	528	518
George L Carrington Middle	1288	921	962	931	877	790	780	768	778	760	742	724
James E Shepard Middle***	546	453	453	453	453	453	453	453	453	453	453	453
Lakewood Montessori Middle***	300	292	292	292	292	292	292	292	292	292	292	292
Lucas Middle	644	512	482	448	424	396	384	365	354	339	336	330
Lowe's Grove Middle	774	627	717	757	815	810	800	797	802	867	889	866
Neal Middle	810	789	846	814	863	844	872	835	840	860	886	864
Sherwood Githens Middle	852	995	1100	1140	1094	1036	1010	985	1019	1021	1018	985
Rogers-Herr Middle***	644	637	637	637	637	637	637	637	637	637	637	637
Totals	6730	5741	6050	6151	6171	5948	5821	5787	5766	5764	5782	5680
High Schools												
C E Jordan High	1810	1902	1870	1877	2081	2294	2384	2427	2310	2231	2117	2053
Hillside (incl. New Tech High)	1535	1671	1723	1637	1838	1812	1945	1908	1907	1936	1947	1994
Northern High	1790	1490	1460	1390	1356	1374	1322	1270	1199	1141	1131	1115
Riverside High	1540	1738	1563	1563	1647	1748	1742	1764	1714	1658	1633	1592
Southern School of Energy and Sustainability	1540	1248	1229	1229	1253	1366	1477	1506	1524	1452	1377	1394
High / 6-12 Choice Schools												
The School for Creative Studies***	700	605	605	605	605	605	605	605	605	605	605	605
J D Clement Early College HS***	350	393	393	393	393	393	393	393	393	393	393	393
City of Medicine Academy***	320	345	345	345	345	345	345	345	345	345	345	345
Durham's Performance Learning Center	350	186	196	228	195	189	189	187	179	172	165	165
Durham School of the Arts***	1655	1331	1381	1381	1381	1381	1381	1381	1381	1381	1381	1381
Middle College HS @ DTCC	200	189	199	187	177	181	189	193	186	180	173	165
Totals	11790	11544	11490	11540	11671	12184	12382	12378	12144	11894	11766	11771
System Total	33824	32430	32479	32426	32441	32677	32731	32594	32347	32154	32068	32076



Operations Research and Education Laboratory
 Institute for Transportation Research and Education
 North Carolina State University

January 17, 2019

4. Recommended Next Steps: A Research Road Map

Emerging from this analysis, there are several operational implications for student enrollment policy, school facility location decisions, and school transportation operations and policy. DPS Leadership and OREd research staff are considering the process for planning for long-range growth and student enrollment in Durham. Through this research collaboration, NCSU ITRE has developed a planning process and research framework to evaluate critical emergent questions:

Q2 – Why is student enrollment in Durham declining?

Q3 – Which factors predict charter school choice?

Q4 – What actionable steps can the DPS Board of Education and District Leadership take to promote an “Invest in Durham” using data-driven policy?

Q5 – How can Durham Public Schools departments of operations transition into a long-range strategy that brings together facility, student enrollment and transportation technical solutions for operational problems?

Research Road Map

	Question	Data Input	Source of Data	Deliverables	Projected Calendar
Issue Identification: Student Enrollment Projection and Development Inventory [Q1-Q3]					
Q1	What are the student enrollment trends and problems that Durham Public Schools (DPS) is facing in the next 10 years?	Historic Enrollment Data; Current Development Data	DPS Planning/Zoning	Land Use Study Student Forecast OOC	2018-19
Q1A	What implications for student enrollment emerge from Fall 2019 ADM Data and On-going Residential Development Projects?	Facilitated Collaboration between DPS Operations and Durham City/County Planning	DPS Planning/Zoning	Updated Land Use Study Updated Student Enrollment Forecast & OOC	Fall 2019
Q2	Why are families choosing Charters?	Focus Groups and Community Input Workshops	Parents, School Community, Neighborhood Institutions	Report on Emergent themes from Durham Enrollment Areas and Populations	Spring – Summer 19
Q3	Which factors predict charter school choice?	Observed family decisions from DPS Student Enrollment Data	DPS	Choice Behavior Model - how multiple factors concurrently play into DPS enrollment choices	Summer – Fall 19

Solution Identification: Comprehensive Plan for Facilities, Student Enrollment and Transportation [Q4]					
Q4	What can be done to address the issue of declining enrollment?	Emergent themes from Community Input Workshop paired with State and National Best Practices	Best Practices from Enrollment and Facility Planning; Case Studies from NC; DPS Staff Experience; Community Input; OREd Optimization and TIMS TIA	Comprehensive Operations Plan for Facilities, Student Enrollment and Transportation	Fall 2019 - Fall 2020
School Board Adoption of Comprehensive Operations Plan [Facilities, Student Enrollment and Transportation]					
Q5	How does DPS Operations Enact the Adopted Plan for Facilities, Enrollment and Transportation?	Pair Student Enrollment Recommendations with Facility Master Plan and TIMS Data	DPS Staff NCSU ITRE/OREd	Technical Solutions and Services for Board Policy Transition	Fall 2020 - Summer 2021

Summary

The first phase of this research project has been to produce a ten-year student enrollment projection for Durham Public Schools. Shared with the Durham Public Schools Board of Education at the January 2019 Monthly Board Meeting, this enrollment forecast shows declining enrollment in Durham Public Schools despite the development of over 100 residential projects in the City and County of Durham. The reasons for this stagnation in student enrollment during a time of larger residential growth are multifaceted and require a thorough analysis utilizing historic public and charter school enrollment data, public and community input, and the experience and perspective of Durham Public Schools’ staff.

Comprehensive Operations Plan & Technical Support for School Facilities, Student Enrollment and Transportation

Prepared by:
School Planning & Transportation at NCSU ITRE

Prepared for: Durham Public Schools
Dr. Pascal Mubenga, Superintendent
Mr. Aaron Beaulieu, Chief Operations Officer
Ms. Donna Hudson, Director of Student Assignment

The long-term, integrated planning for schools in communities involves the synthesis of data from coordinated operational services - facilities, enrollment, and transportation. These services operate in neighborhood, municipal, regional and state regulatory, financial and political contexts. The greater the coordination, the more likely that communities and schools plan together for sustained, equitable growth.

In 2018, Durham Public Schools (DPS) contracted with the Operations Research and Education Laboratory at NCSU ITRE (OREd) to project student enrollment trends over the next 10 years, until 2028. Emerging from this analysis, DPS Leadership and OREd Researchers reviewed the findings and operational implications for student enrollment policy, school facility location and capacity, and school transportation operations and routing.

Emergent Research Needs

Through this research collaboration, DPS Leadership requested that NCSU ITRE develop a proposal and planning process to evaluate questions that emerged from the declining student enrollment forecast:

Understanding the Problem

Q2 | Why is student enrollment in Durham declining, and why are families choosing Charters?

Q3 | Which factors predict actual, observed charter school choice?

Solutions for Declining Enrollment

Q4 | What actionable steps can the DPS Board of Education and District Leadership take to promote an “Invest in Durham” using data-driven policy?

Q5 | How can Durham Public Schools departments of operations transition into a long-range strategy that brings together facility, student enrollment and transportation technical solutions for operational problems?

Research Plan and Schedule

NCSU ITRE will pursue this research agenda using all available research methods:

- To begin, OREd will work with DPS to convene focused enrollment area workshops that collect and identify community factors and perspectives associated with the decline in student enrollment.
- Next, OREd will develop and test a student enrollment behavioral model built based on observed family choices on whether to enroll in Durham’s public schools, magnet schools, or charter schools.
- Collectively, this input from both community perspectives and observed behaviors will inform the recommendations OREd produces for DPS.
- Lastly, OREd and the School Planning & Transportation Group at NCSU ITRE are equipped to help DPS Operations and Leadership transition into changes to facilities, student enrollment and transportation.

The research plan and scope of work outlined below reflect these research questions in NCSU ITRE’s support of data-driven school board policy and planning in Durham County, North Carolina.

1. Understanding the Problem

Development Inventory	Completed by OREd, Fall 2018
Student Enrollment Forecast	Completed by OREd, Fall 2018

Report on Emergent Themes from Durham Enrollment Areas	Proposed, Spring – Fall 2019
Charter School Choice Behavior Model	Proposed, Summer – Fall 2019
Updated Land Use Study, Student Enrollment Forecast & OOC	Proposed, Winter 2020

2. Solutions for DPS Enrollment, Facilities and Transport Changes

Balance SW Student Enrollment to Alleviate Capacity Issues	Proposed, Summer 2019
Comprehensive Operations Plan [Facilities, Student Enrollment and Transportation]	Proposed, Fall 2019 – 2020
Technical Solutions and Services for Board Policy Transition	Proposed, Fall 2020 – 2021

Recommended Research Road Map

Question	Data Input	Source of Data	Deliverables	Projected Calendar	
Issue Identification: Student Enrollment Projection and Development Inventory [Q1-Q3]					
Q1	What are the student enrollment problems that Durham Public Schools (DPS) is facing in the next 10 years?	Historic Enrollment Data; Current Development Data	DPS Planning/Zoning	Land Use Study Student Forecast OOC	2018-19
Q1A	What implications for student enrollment emerge from new data?	Facilitated Collaboration between DPS and City/County Planning	DPS Planning/Zoning	Updated Land Use Study Updated Student Enrollment Forecast & OOC	Winter 2019
Q2	Why are families choosing Charters?	Focus Groups and Community Input Workshops	Parents, School Community, Neighborhood Institutions	Report on Emergent themes from Durham Enrollment Areas and Populations	Spring 2019 - Summer 2019
Q3	Which factors predict charter school choice?	Observed family decisions from DPS Student Enrollment Data	DPS	Choice Behavior Model - how multiple factors concurrently play into DPS enrollment choices	Summer 2019 - Fall 2019
Solution Identification: Comprehensive Operations Plan [Facilities, Student Enrollment and Transportation]					
Q4	What can be done to address the issue of declining enrollment?	Emergent themes from Community Input Workshop paired with State and National Best Practices	Best Practices from Enrollment Facility Planning; NC Case Studies; DPS Staff Experience; Community Input	Comprehensive Operations Plan for Facilities, Student Enrollment and Transportation	Fall 2019 - Fall 2020
School Board Adoption of Comprehensive Operations Plan					
Q5	How does DPS Operations Enact the Adopted Plan for Facilities, Enrollment and Transportation?	Pair Student Enrollment Recommendations with Facility Master Plan and TIMS Data	DPS Staff NCSU ITRE/OREd	Technical Solutions and Services for Board Policy Transition	Fall 2020 - Summer 2021

1. Understanding the Problem

Q1A. What implications for student enrollment emerge from new data?

OREd will continue to collect residential development data throughout 2019-2020 in coordination with Durham City/County Planning Staff.

- Residential development updates will include project title, magnitude, locational/geographic features, and anticipated build begin and end dates.
- Collect fall of 2019 Average Daily Membership student enrollment data.
- Analyze short- and long-term student enrollment implications from updated development and annual enrollment data.

Q2. Community Input Meetings: Why are families choosing Charters?

OREd will pursue a deeper understanding of what goes into the decision making of school-aged families in regards to choosing Durham Public Schools or other available enrollment options, such as charter schools, private schools and home schooling.

- Convene Focused Area Enrollment Studies with DPS Staff, which include Community Input Workshops in partnership with school-level, community-level, and neighborhood institutions.
- The Workshops will be held in regions of the district with low student enrollment in DPS.
- Using facilitated question prompts, OREd will engage participants in activities that are qualitative (verbal) but that can be coded into quantitative data for deeper assessment.
- In addition to these community input workshops, semi-structured interviews with DPS Staff and Administration will verify findings from Community Input Meetings.

Q3. Behavior Model: Statistically, which factors predict charter school choice?

Many factors may affect a family's decision to attend DPS or charter schools. Major relevant factors may include: the supply of available charter seats, student and school achievement, student-to-school proximity, school facility conditions, etc.

A Choice Behavior Model is a quantitative way to examine which of these and other factors are the most impactful to families based on their observed decisions. Knowing which factors influence charter school choice can help DPS identify what steps can be undertaken to help attract and retain these students.

- Input 2018-19 charter and non-charter student data from DPS. Add additional variables describing the assigned and potential charter school options available to each student.
- Develop a binary choice linear regression model using a statistical software program. Account for and test the impact and statistical significance of variables such as student distance to school, school report card data, facility age and condition, and other factors.
- Interpret initial results and share with DPS staff. Adjust the model by adding additional variables and test for their significance at the request of DPS staff.
- Share conclusions with DPS staff. The results of this analysis could yield actionable funding priorities for the school district as DPS aims to attract and retain charter students.

2. Exploring Solutions for DPS

Q4. What can be done to address the issue of declining enrollment?

OREd will bring together the themes emergent from community input workshops and staff input with the predictive factors in the school choice model to identify operational solutions to the problem of declining student enrollment.

- Synthesis of findings from Community Input Meetings and School Choice Predictive Model. Summary will distill themes emergent with mixed methods research design.
- Review national and regional best practices for urban education.
- Model Optimal Locations for New Schools and/or Optimal Attendance Zone Scenarios
- Transportation Impact Assessment of facility or student enrollment operational changes.
- Present all findings to school officials for review. Advisement on Board decisions that respond to the findings from the analysis in the context of operational research and practice.
- Board action regarding enrollment, facility and transportation priorities and actions.

Optimization of Student Enrollment Boundaries, Facilities and Transportation

Using the student enrollment forecast, optimal attendance zone scenarios are generated using Operations Research optimization algorithms.

- The scenarios allow district staff and Board members to examine attendance zone options based on clearly defined scenario assumptions.
- Minimizing student transportation distance and balancing building utilization are the typical goals of Optimization.
- Model parameters such as building capacity and demographic balance indices may be adjusted to meet specific policy-defined criteria.
 - Demographic data, socioeconomic indices, and academic performance also may be incorporated and balanced.
 - New school siting and the feasibility of alternative building configurations can also be evaluated mathematically using Optimization.
- Facility configuration scenarios can be generated including examining consolidation possibilities while drawing corresponding attendance boundaries which minimize transportation distance.
 - Run new school location optimization algorithms for impacted grade levels.
 - Run boundary optimization(s) for each impacted level for specific years as requested by the school district.
 - Create maps and data summaries to describe optimal scenarios.
- Using TIMS Data, simulate new facility and magnet enrollment impacts on the existing school transportation system.

Q5. How Can DPS Transition to Comprehensive Plan for Facilities, Enrollment and Transportation?

Transition Planning is critical to consider how Durham Public Schools will migrate from existing facility, student enrollment and transportation configurations to adopted policies by the DPS Board of Education.

- This includes the potential for new school construction, realignment of magnet programming, and Grandfathering for Students.
- DPS will require significant help in managing the operational transition from year-to-year.
- Ongoing Development in Durham City and County (Land Use Updates).
- Corresponding Updates to Student Enrollment Projections, Student Assignment Boundaries, and Facility Locations & Capacities.
- Transportation School Bus Routing Design and Efficiency Optimization



DURHAM

PUBLIC SCHOOLS

Printed : 4/18/2023 1:25 PM ET

ITEM : IV.A. Review of Discretionary Transfer Options for 2023-2024 & Spot Reassignment Consideration for Efland-Cheeks Elementary School ['10] **Date**

12/12/2022

Action Item (Yes / No)

Yes

Subject

Review of Discretionary Transfer Options for 2023-2024 & Spot Reassignment consideration for Efland-Cheeks Elementary School

Staff Contact

Catherine Mau, Student Assignment and Technology Projects Coordinator

Patrick Abele, Deputy Superintendent

Goals

Strategic Goal 2-OUTCOME GOAL 2: EXCELLENCE AND EFFICIENCY - (Aligns with Equity Goal 5: Make decisions, draft policies and allocate and utilize resources that are aligned to the district Equity Policy. Assess the racial and equity impact of decisions, policies, and resource allocation and identify strategies to address inequities.)

Purpose

1. To review spot reassignment of subdivisions from Efland-Cheeks Elementary School to Grady A. Brown Elementary School due to school capacity issues. Following parent and community feedback, the administration anticipates bringing this item back to the Board of Education in late January or early February, 2023.

2. To approve the Discretionary Transfer and Admission Options for the 2023-24 school year as presented at the [December 6, 2022](#) Board Retreat.

Background**REVISED****Background**

To provide application process updates for Discretionary Transfers, Discretionary Admissions, and Choice programs in accordance with local policies; and provide key dates for information purposes.

To confirm the designation of current Choice Schools/Programs for the next school year.

To discuss additional Spot Reassignment for 2023-24 to reduce overcrowding at Efland-Cheeks Elementary School.

Updates for Information Only

Process

Student Assignment is planning to combine and expand the windows for Discretionary Transfers, Discretionary Admissions, and Choice programs from January 1 until February 28, 2023. Parents will be able to use a single login to apply and to enroll their children in school. New student enrollment will begin January 1, 2023.

Notices of School Assignment for 2023-24 will be sent in a printed letter or through the online document delivery system.

Key Dates

November, 2022

November 15: SAPFO (Schools Adequate Public Facilities Ordinance) Membership Submission to Orange County Planning

December, 2022

December 6: Recommendation to Board of Education for 2023–24 transfer options and spot reassignment

December 12: Board of Education approval of 2023–24 transfer options

December 12: Board of Education approval of 2023–24 tuition rate of \$4,808

January, 2023

January 1: Kindergarten and new student registration begins

January 1–February 28: School Choice, Discretionary Transfer, and Discretionary Admission application window opens/closes

January 6: Annual Notice of Student Assignment letters sent home to students in a printed letter or through the online document delivery system.

March, 2023

March 1–15: School Choice, Discretionary Transfer, and Out-of-District Discretionary Admission applications are processed

March 16–31: Notifications to families regarding transfer applications are sent

2023-2024 Spot Reassignment Options to Address Overcrowding at Efland-Cheeks Elementary School

Due to the significant development in Mebane, Efland-Cheeks Elementary is well over capacity. The school has enrolled 522 K–5 students, and has a 1.15 Level of Service (LOS). When adjusted to include Pre-K students, the school's enrollment is at 552 students with a 1.21 LOS. All 26 of the school's classrooms are in use, with specials and pull-outs taking place in hallways. Class sizes in grades K–3 are at or over the maximum allowed by NC State Law requiring a [district waiver](#). Class sizes are set locally for grades 4–12; the school continues to have class size overages in grades 4–5. As new students continue to move into the area, the school's enrollment numbers have increased. A [previous spot reassignment](#) approved by the Board on August 30, 2022 has moved students to Central Elementary. So far, only one student has moved.

The adjacent Collington Farms and Meadows subdivisions have added 197 students to the district. 90 of the students added are in the elementary school level. Construction is active, with 16 more houses to be built.

Subdivision	Number of Elementary Students
Collington Farms	65
Meadows	33
Ashbury	67

Building age and Capacity

Building age and capacity are shown below.

	Year Built	Square Feet	SAPFO Capacity	Membership 11/15/2022	Available Seats	Level of Service
Central Elementary	1952	52,492	428	296	132	0.69
Efland-Cheeks Elementary	1952	64,316	455	522	-67	1.15
Grady Brown Elementary	1974	74,016	490	415	75	0.85
Hillsborough Elementary	1952	51,106	420	428	-8	1.02
New Hope Elementary	1991	100,164	526	528	-2	1.00
Pathways Elementary	2000	85,282	540	309	231	0.57
River Park Elementary	1956	70,812	502	561	-59	1.12
All Elementary	54 years	498,188	3,361	3,023	338	0.90
A.L. Stanback Middle	1995	136,000	740	644	96	0.87
Gravelly Hill Middle	2006	123,600	700	430	270	0.61
Orange Middle	1968	107,620	726	524	202	0.72
All Middle	32 years	367,220	2,166	1,656	510	0.76
Cedar Ridge High	2002	256,900	1,500	1,111	389	0.74
Orange High	1962	213,509	1,399	1,342	57	0.96
Partnership Academy	2006	6,600	40	34	6	0.85
All High	32 years	477,009	2,939	2,472	467	0.84
All Schools	44 years	1,342,417	8,466	7,151	1,315	0.84

Projections

Projections using three-year averages are shown below.

Projected, 20th day 2023 Using 3-Year Advancement Rate

	K	1	2	3	4	5	6	7	8	9	10	11	12	Proj Total	PMR1 2223	Capacity	Seats	LOS
Central ES	42	43	52	50	53	52								292	286	428	136	0.682
Efland-Cheeks ES	88	90	88	90	104	99								559	450	455	-104	1.229
Grady Brown ES	59	61	64	68	62	70								385	394	490	105	0.785
Hillsborough ES	72	73	70	69	75	65								423	420	420	-3	1.008
New Hope ES	92	95	94	83	87	91								542	493	526	-16	1.030
Pathways ES	40	41	40	48	54	54								278	304	540	262	0.514
River Park ES	96	95	89	94	90	107								572	544	502	-70	1.139
A.L. Stanback MS							221	230	208					658	633	740	82	0.889
Gravelly Hill MS							125	133	166					424	439	700	276	0.605
Orange MS							165	164	182					512	517	726	214	0.705
Cedar Ridge HS										300	276	278	228	1,083	1,018	1,500	417	0.722
Orange HS										365	375	327	289	1,356	1,337	1,399	43	0.969
Partnership HS										13	16	14	0	44	27	40	-4	1.089
TOTAL Projected 23-24	490	497	499	502	525	538	511	527	556	678	668	620	516	7,126	6,862	8,466	1,340	0.842

Next Steps

The superintendent recommends the Board approve the Open/Limited/Closed Schools designations and the Discretionary Transfer & Admissions recommendations for 2023–24 school year as follows:

Limit Discretionary Transfer Applications for 2023–24

A. Due to state class size mandates, overcrowding at all but three district elementary schools, continued and forthcoming spot reassignment, and the comprehensive reassignment plan, the superintendent recommends that the Board approve the attached recommended revisions to Policy 4150, which would require families to reapply annually in order for students to continue attending schools as transfer students and would stipulate that such requests shall be granted if the school is under capacity but may be denied if the school becomes overcrowded in subsequent years. Absent this revision, families granted a transfer under Policy 4150 would be entitled to keep their children enrolled at their new schools throughout the grade span, even if the reassignment plan adds substantial numbers of students to that school's regular attendance zone. After the reassignment plan has been developed and implemented, the Board could restore the current language in Policy 4150 and give transfer students a right to complete the grade span at their new schools without adversely impacting the overall intent of the assignment plan. Because of time constraints, the administration recommends that the Board waive second reading and adopt these policy revisions at this meeting.

B. Discretionary transfers may be approved by the administration for students in grades 6-12 to the following schools as per Section B of Policy 4150:

Open Schools (Anticipated capacity less than 85%):

- Gravelly Hill Middle
- Orange Middle
- Cedar Ridge High (IB and Traditional)

Limited Capacity School (Capacity at 85–94%):

- A.L. Stanback Middle

The administration recommends that all other schools be designated as “closed” to transfers pending development and implementation of the forthcoming reassignment plan. This designation would impact the administration’s processing of transfer requests but would not impact the laws and policies governing Board consideration of individual transfer requests.

C. The Superintendent recommends further revisions to Board Policy 4150 (Section C) to authorize the administration to assign decline to allow employees to transfer their children to the schools within the assignment areas of the schools where they work if such transfers would contravene the overall intent of the Board’s assignment plan, in which case other options would be offered. This change would not affect the children of employees who have already received transfers. The administration currently projects that it would exercise this authority only with respect to new elementary-aged children of staff working at Orange Middle, Orange High, Central Office, Transportation, and the Welcome Center. Based on current projections, such children would be assigned to either Pathways Elementary or River Park Elementary..

D. Authorize the Superintendent or designee to allow K–12 transfer requests to be processed outside the transfer window for the remainder of the 2022-2023 school year if granting such transfer requests would ease overcrowding at over-capacity schools or eliminate class size exceptions. This change would in essence be a limited waiver of policy and would not require a specific policy revision.

E. Authorize the administration to advise families when processing transfers for 2023 and beyond that students may still be reassigned to another location pending approval of the school boundaries as defined in the student assignment plan.

Note for choice program enrollment to Hillsborough Elementary School (year-round) and Cedar Ridge High School (IB): Continue to provide opportunities for transportation services to students approved to attend Board-approved Choice Schools or Programs as feasible, along existing routes or by establishing new routes or services within the existing school bus fleet.

All transfer students (except for the choice schools indicated above and staff members whose children are eligible for school bus transportation from the employee’s work site) are not eligible for school bus transportation.

Equity Impact

To provide equitable student assignment practices and opportunities for parents/guardians to request or enroll children in a different school or a choice school/program. The district continues to ensure processes are in place to alleviate overcrowded schools.

Financial Impact

None

Recommendation for Action/Next Steps

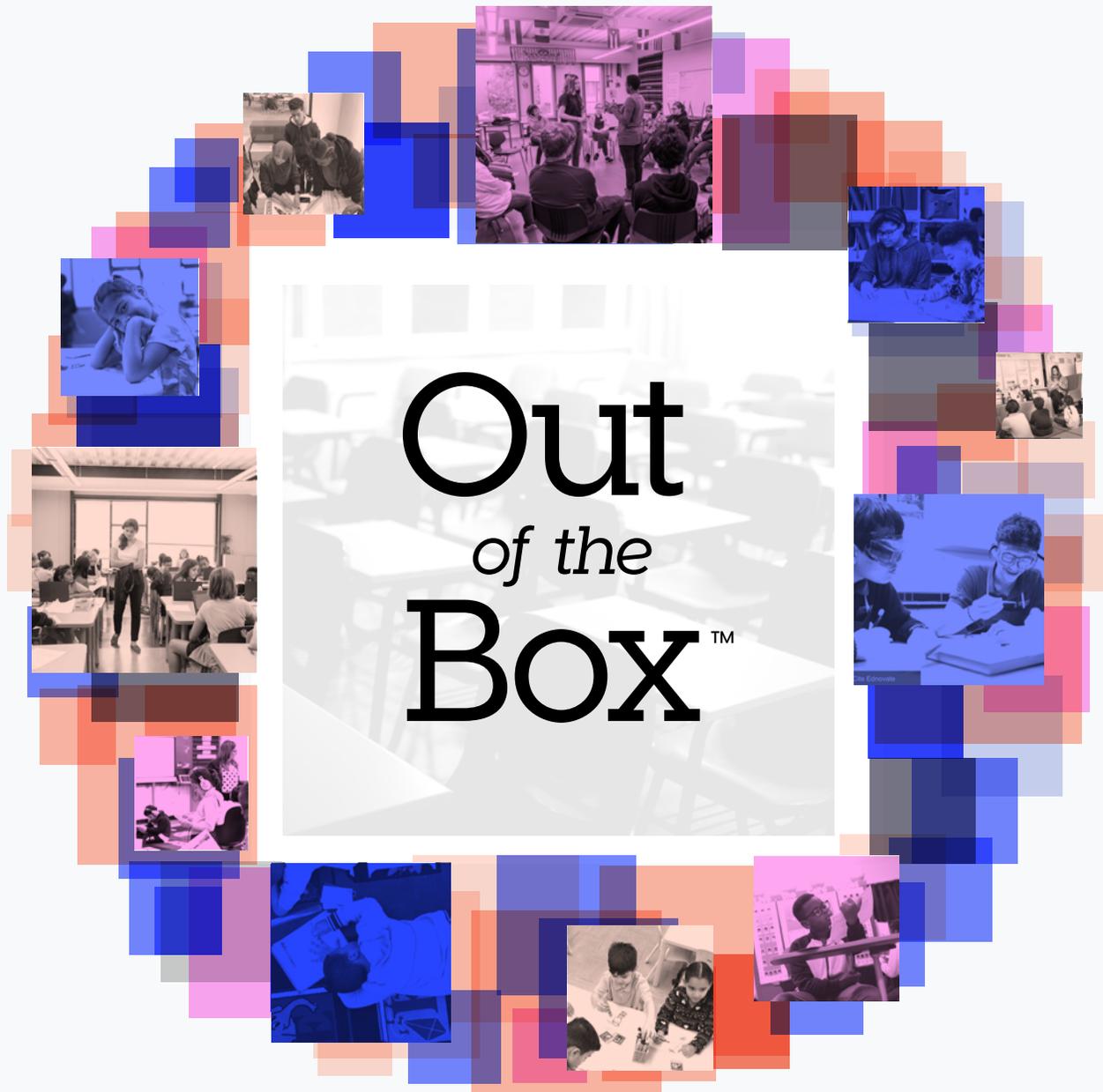
The Superintendent recommends the Board approve the Open/Limited/Closed Schools designations and the Discretionary Transfer & Admissions recommendations for 2023–24 school year as described above.

The Superintendent further recommends the Board waive 2nd reading and approve Policy 4150: School Assignment and Transfers on first reading in order to meet notification deadlines for families starting January 1, 2022. The policy change would not impact any family with a current approved transfer and would not impact new requests for enrollment at Hillsborough Elementary School or the IB program at Cedar Ridge High School. The requested change would impact all other NEW transfers requested after January 1, 2023.

Supporting Documents

[Policy 4150 DRAFT Revised 12.9.2022](#)

[Memo Operations Policy Updates 12.12.2022](#)



Out *of the* Box™

How Innovative Learning Models Can Transform K-12 Education



Joel Rose, Jeff Wetzler, and Jenee Henry Wood

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Most important, none of this would be possible without our partner schools, teachers, and students, from whom New Classrooms and Transcend partners learn every day. We hope this report succeeds in elevating their voices.

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Bart Epstein	President and Chief Executive Officer EdTech Evidence Exchange
Will Ethridge	Former Chief Executive Officer Pearson North America
Julia Freeland Fisher	Director of Education Christensen Institute
Denise Forte	Interim Chief Executive Officer The Education Trust
Thomas Hatch	Director, National Center for Restructuring Education, Schools & Teaching Professor of Education, Teachers College, Columbia University
Bill Hite	Chief Executive Officer KnowledgeWorks

Jen Holleran	Philanthropic Advisor and Consultant
Michael Horn	Author, <i>From Reopen to Reinvent</i>
Laura Jimenez	Director, Office of State and Grantee Relations US Department of Education
Timothy Knowles	President Carnegie Foundation for the Advancement of Teaching
Holly Kuzmich	Executive Director George W. Bush Institute
Lewis Leiboh	Senior Program Officer, Educational Technology Bill & Melinda Gates Foundation
Mike Magee	President Minerva University
Jamie McKee	Deputy Director, K-12 Education Bill & Melinda Gates Foundation
Frances Messano	President NewSchools Venture Fund
Pedro Noguera	Dean USC Rossier School of Education
Lillian Pace	Vice President of Policy and Advocacy KnowledgeWorks
Susan Patrick	President & Chief Executive Officer Aurora Institute
Lauren Perry	Senior Advocacy Manager Walton Education Coalition
Bill Porter	Partner Education First Consulting
Beth Rabbitt	Chief Executive Officer The Learning Accelerator
Roberto Rodríguez	Assistant Secretary for Planning, Evaluation, and Policy Development United States Department of Education
Allison Rose Socol	Vice President for P-12 Policy, Research, and Practice The Education Trust
Javaid Siddiqi	President and Chief Executive Officer The Hunt Institute
Sonja Santelises	Chief Executive Officer Baltimore City Public Schools

Sanjay Sarma	Vice President for Open Learning Massachusetts Institute of Technology
Maia Sharpley	Founder and Managing Partner Odonata Ventures
Kim Smith	Entrepreneur-in-Residence Cambiar Education
Brooke Stafford-Brizard	Vice President, Research to Practice Chan Zuckerberg Initiative
Saskia Thompson	Program Director, New Designs to Advance Learning Carnegie Corporation of New York
Valerie Truesdale	Assistant Executive Director American Association of School Administrators
Marla Ucelli-Kashyap	Senior Director, Educational Issues American Federation of Teachers
Elisa Villanueva-Beard	Chief Executive Officer Teach for America
Elliot Washor	Co-Director The Big Picture Company
Jason Weeby	Independent Education Consultant

Executive Summary



Education can make all the difference in the life trajectory of a young person. It can open their minds, reveal their talents, drive their future economic mobility, and provide them with tools to safeguard democracy.

For more than 100 years, our nation’s central approach to schooling has oriented around an individual teacher guiding the instruction of a cohort of same-aged students through a uniform curriculum, often with the aid of a textbook. We call this approach to schooling the “industrial paradigm” because it was patterned after the standardized ways in which factories operated during the industrial era. At the time, it was considered the most efficient way of supplying a culturally assimilated, factory-ready workforce that was able to perform repetitive tasks, follow directions, and apply basic numeracy and literacy skills.

Since then, the creation and scale of over 100,000 schools based on the industrial paradigm has been one of our nation’s most impressive historical achievements, providing millions of young people with many of the opportunities that education affords.

However, high-quality education within this industrial paradigm has not always been accessible to all students. The quality of education has varied greatly most notably across racial, economic, and geographic lines. Over time, advocates have worked tirelessly to address these inequities, earning hard-fought victories in areas such as school integration, funding, special education, early childhood, and food and health services so all young people can have a fair chance. Building on that progress, reformers in more recent decades expanded options, elevated expectations, improved curricula, developed new technologies, improved human capital pipelines, and more. Each of these efforts has moved the sector forward and created new and better opportunities for countless students.

Factories in the early twentieth century needed workers with a basic set of skills, and the most efficient way to get them was through an educational delivery model patterned after the factory itself.



The Factory



The Factory-Model Classroom

At the same time, many of these efforts have faced limitations, have been hard to scale or sustain, and, in some cases, have had unintended consequences. While there are hundreds of examples of schools, school networks, initiatives, and programs that can validly point to evidence of meaningful success, national-level measures of student performance have largely plateaued.¹ And while graduation rates have somewhat improved, still only about one-third of students graduate high school ready for college or a career.²

We believe the ultimate impact of many worthy reform efforts has been hindered by key elements of the industrial paradigm itself. Higher grade-level standards, for example, can help to ensure higher levels of academic rigor, but provide little guidance when students begin a school year multiple years behind. Good teacher training can make a big difference for the students they serve, but when skilled teachers burn out trying to fill a fundamentally unsustainable role, it is back to square one with a new teacher. Formative assessments can illuminate specific needs for each student, but operationalizing a unique academic plan for each of them is nearly impossible for an individual teacher.

In recent years, COVID-19 unleashed multiple new challenges for schools to confront, including the need to address its profound impact on students' academic and mental health. Teachers bear this burden, along with all of their other responsibilities, given the design of their role in the industrial paradigm. For many teachers, this role was unsustainable even before the pandemic. Now, these additional responsibilities and challenges are causing them to leave the profession.

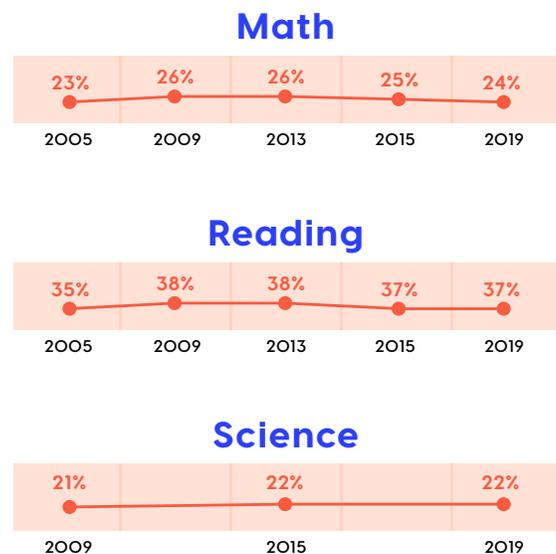
While it is vital to address immediate challenges, it is also critical to begin focusing on a longer-term vision for schooling. This new vision must move beyond the constraints of the industrial paradigm so the sector can reliably and systematically provide our nation's youth with an education that enables all of them to realize their full potential.

What might a new, student-centered paradigm of schooling look like?

Imagine, for example, elementary classes that deeply embed the science of reading, making use of phonics instruction to the degree appropriate for each student and using technology and artificial intelligence to support building the requisite vocabulary and content knowledge to access rigorous text. In middle-grade math, imagine sophisticated diagnostic assessments generating a personalized learning plan that adapts daily and allows each student to drive their own progress using a variety of learning modalities (e.g., teacher-led, collaborative, and independent). Science and social studies classes could integrate combinations of text, virtual reality, group discussion, and interdisciplinary projects that extend beyond what an individual teacher could sustainably plan for each day.

For all of these subjects, instruction could happen inside or outside of the school, and in ways that build both individual student agency and a strong sense of community. Assessments could be reliably embedded within

Percent of US Students Proficient and Above (12th Grade NAEP)



Source: NAEP Data Explorer



the students' learning experiences in order to provide helpful, real-time information to both teachers and to systems leaders, rather than thought of as a separate event.

These kinds of advances reflect just the beginning. Breakthroughs in brain science, artificial intelligence, and other advances in technology are continually opening up new possibilities to both support student learning and make educator roles more attractive and sustainable. However, just as an engine has little value atop a horse and buggy, truly realizing new possibilities requires fundamentally reimagining elements of existing paradigms in order to transition to something new and better.

The K-12 sector is not built to organically enable this type of paradigm shift. School operators generally do not have the design capacity to alone fundamentally reimagine learning—particularly if that involves sophisticated uses of technology. Nor do individual

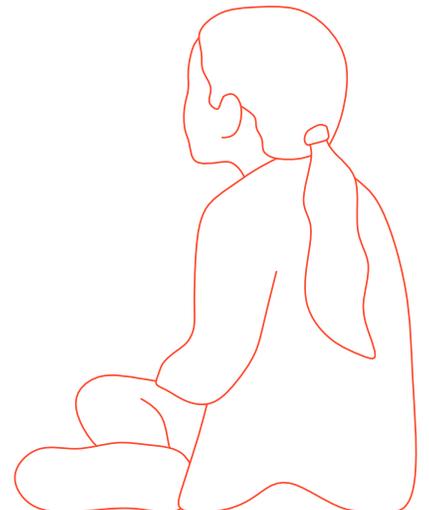
teachers, who simply cannot be expected to design the classroom of tomorrow while also managing the classroom of today. And unlike in sectors such as energy, defense, and healthcare, there is not a robust ecosystem of organizations focused on building for the future.

That is why making the shift to student-centered learning is going to require a new type of coordinated effort centered on reimagining what schooling can be and then bringing that vision to life.

We are not the first ones to call for concerted action aimed at moving away from the industrial paradigm. In the 1990s, a federal initiative called New American Schools (NAS) funded the development of organizations to create designs that would “break-the-mold,” while then helping schools implement those designs. While the initiative had some successes that continue to this day, many of the models it spawned ultimately reflected modest deviations from the industrial paradigm of schooling.³ (More on NAS can be found on page 40).

Now is the time to revisit the basic premise of NAS in order to comprehensively address today's challenges. The tools and know-how now available to support modernizing our national approach to schooling—from the internet to artificial intelligence to advancements in learning science to innovative approaches—go far beyond what was available thirty years ago.⁴ Profound losses and severe staffing shortages also changed the national context over the past two years, creating a national imperative to ensure the challenges facing schools today do not become permanently entrenched.

But advances in technological capacity and know-how are not enough to facilitate the transition to a student-centered paradigm. If it were, breakthrough innovations such as television, the personal computer, and the internet would have had a more pronounced impact on education over the last century than most evidence suggests they have. Instead, renewed efforts aimed at true system modernization must comprehensively address the three primary forces that have collectively kept the industrial paradigm intact.



First, our nation’s decentralized system for education governance allows local communities to play a significant role in decisions about schooling. There is great benefit to this, given the uniqueness of each local context and the perspectives that stakeholders (including students, families, educators, administrators, and other community members) have around their values, needs, and experiences. However, the educational visions they set for their young people can readily be limited to what is most familiar. Even when school communities articulate bold visions, they rarely have the capacity or risk tolerance to design and build what it takes to actualize them. As such, they are left to debate and decide about changes and solutions *inside* of the industrial paradigm, rather than pursue a fundamentally better way.

Second, there is a lack of solutions for schools looking to transition to a student-centered paradigm. Many of the products purchased by schools can be effective in addressing specific school needs: a better history textbook, an interactive whiteboard, or an electronic gradebook, for example. However, in order for products to be adopted at scale (a goal strongly encouraged or required by funders or investors), they must also fit inside the current design of a typical school. As a result, these solutions—and the hundreds of millions of dollars that support them—typically serve to reinforce, rather than challenge, the industrial paradigm of school.

And third, the K-12 landscape itself has fortified the industrial paradigm by developing a host of policies, practices, and priorities designed to encourage incremental progress. Because they must be immediately implemented within today’s system and face pressure to show immediate results, they have the effect of buttressing the industrial paradigm’s constraints, making it harder for innovative educators to move beyond it. As a result, a regulatory landscape that incorporates everything from textbook adoption to credit requirements to staffing structures to accountability systems to school improvement plans creates a cumulative level of inertia that can seem daunting to overcome.

Together, these three forces—community demand shaped by what’s most familiar or feasible, program supply constrained by what’s most scalable, and a K-12 landscape designed to optimize performance within today’s industrial paradigm—have collectively made it nearly impossible for school communities to escape its grip.

Overcoming these formidable obstacles can best be done when key stakeholders in local school communities come together to develop a new vision, unconstrained by the assumptions of the industrial paradigm, for what they want young people to experience and what learning outcomes they aspire for them to have attained upon graduation. In some communities, these aspirations are centered on greater levels of personalization and more relevant learning experiences. Others are focused on greater identity affirmation and a deeper integration of academic and social-emotional development. Still, others seek the opportunity for learning to take place anytime and anywhere and for

WHAT KEEPS THE INDUSTRIAL PARADIGM IN PLACE

K-12 Landscape Designed to Optimize Performance Within the Industrial Paradigm Itself

Program Supply Constrained by What’s Most Scalable

Community Demand Shaped by What’s Most Familiar



INDUSTRIAL PARADIGM CLASSROOM

students to accelerate in ways that are divorced from the traditional, grade-level pathway. Regardless of their focus, the act of inclusively engaging stakeholders in local communities is essential for building the conditions required to sustain a transition to a student-centered design.

As school communities come to articulate their vision, they will most often need to work with a set of partners to bring their vision to reality. Schools and districts are built and resourced to operate schools, not necessarily to redesign them. Thus, in order for schools to deliver on their aspirations, we are highlighting the need for a new type of organization, an **innovative model provider**, to support school communities in actualizing the visions they set forth.

Innovative model providing is centered on the idea that the tools and resources available to support a profound shift from the industrial paradigm must be thoughtfully woven together into comprehensive and intentionally designed programs which schools can adopt, adapt, and integrate in order to actualize their vision.

That type of program, which may be called a **learning model**, integrates:

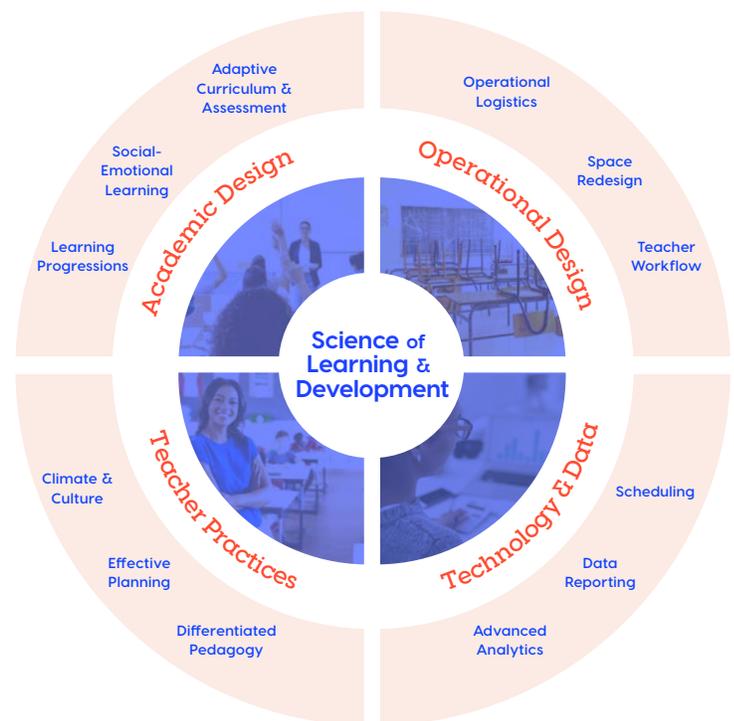
- an instructional design that thoughtfully incorporates components such as content, assessment, educational research, and cognitive science;
- an aligned set of pedagogical practices that is sustainable for teachers and leverages what they are uniquely suited to do;
- an operational design that reimagines teacher workflow, the use of time, and classroom design; and
- a technological design that embeds the use of student-level data and relevant technological tools to realize the model's vision.

Model providers are organizations that design new learning models for different subjects and grade spans through extensive research and development. To do so, they assemble the diverse talents of educators, technologists, researchers, experts in child and adolescent development, creatives, and others to deeply understand what school communities want their students to experience. This allows them to partner closely with innovation-minded school communities, including students and families, to develop and iterate on models that reflect local aspirations and that can ultimately be sustained with public resources.

As these models become more mature, model providers then partner with a broader number of school communities that share similar aspirations for their students and that want to support a local implementation. In doing so, both the model provider and the partner school have explicit and complementary roles to play in the process, and both parties then share in the responsibility for the resulting student outcomes.

Unlike charter schools, which are focused on whole-school management, model providers are organizations that work closely with existing schools regardless of their governance structure. Whether in the design phase or in the

Innovative Learning Models





implementation phase, participating teachers remain on the payroll of the school operator, but they engage with the model provider for many of the corresponding instructional materials and professional support services.

We are leaders at two organizations who spent the last several years working to develop the model provider sector in different ways. Our work builds on the foundation set by organizations such as New Schools Venture Fund, which has been especially vital to the birth of model providing through its direct support for model providers and through the frameworks and guidance it released.⁵ We are also grateful to other organizations such as the Clayton Christensen Institute, New Profit, the Aurora Institute, and the Learning Accelerator, as well as local and national education foundations whose support helped to seed the model provider sector.

Through our collective work, we have come to understand both the promise of innovative learning models and the profound impact they can have on the education system—especially when adopted by school communities that have defined their aspirations, built local conditions for change, and selected models aligned with those ideals. But those schools are far more the exception than the rule: a century of operating

within the industrial paradigm has created fixed mindsets, inflexible policies, and organizational power dynamics that can all make moving beyond the industrial paradigm far more difficult than one might hope. No matter how impactful, how adoptable, and how sophisticated innovative learning models can be, a broad-based transition to a student-centered paradigm will depend on educators, local communities, philanthropists, systems leaders, and policymakers creating the conditions for schools to overcome these barriers and embrace a modernization agenda. This means that a coalition for collective action that is far bigger than any single organization—including our own—will be required to overcome historical challenges of scaling and sustaining change in education systems.

We have organized this plan into four sections:

The Introduction, “Thinking Outside the Box,” describes why the pandemic provides a watershed moment to revisit the core assumptions around schooling.

Part One, “Seeing the Box,” makes the case for why innovation toward a student-centered paradigm is essential to turning the page on the industrial model to schooling, given its inherent limitations.

Part Two, “Getting Out of the Box,” defines innovative learning models and describes how they are developed and adopted.

Part Three, “Moving Beyond the Box,” lays out recommendations for how leaders from government, philanthropy, and school systems can help realize the potential of innovative learning models at scale.

Model providing is one approach for addressing the structural barriers to the widespread adoption of a student-centered paradigm.⁶ We welcome and value the introduction of other ideas and approaches aimed at reaching the same ends.

Barriers & Recommendations

Barriers

Recommendations

Supply

High entry barriers and low entry incentives for becoming model providers

The dearth of investment in education research and development

Lack of capacity required to support widespread distribution and support

School Operators:

Launch a model design team.

Federal Policymakers:

Invest in the development of innovative learning models and in the organizational capacity of model providers.

State Policymakers:

Invest in the development of innovative learning models and in the organizational capacity of model providers.

Philanthropy:

Invest in the identification, organizational capacity, and success of model providers.

Education Advocates:

Advocate for policies that support the incubation and support of model providers.

Potential Model Providers:

Existing Organizations:

Examine existing solutions and consider what would be needed for them to become innovative learning models.

Entrepreneurs:

Consider launching a new organization focused on model providing.

Demand

Systemic inertia rooted in stakeholder mindsets

Conditions that are insufficient to overcome systemic inertia

School operators lack an awareness or understanding of model providing

Incongruous cost structures

School Operators:

Engage school communities around the development of a shared vision for the future.

Ensure internal structures, policies, and stakeholders are aligned in support of model adoption.

Explore and budget for the adoption of innovative learning models as a primary or supplemental curricular offering.

Federal Policymakers:

Fund the early adoption of innovative learning models.

State Policymakers:

Launch statewide efforts such as Innovation Zones to further accelerate the adoption of innovative learning models within a defined regulatory structure.

Philanthropy:

Invest in the initial demand for innovative learning models in local or national contexts.

Education Advocates:

Encourage local school operators to explore innovative learning models and consider their adoption.

Landscape

Systemic inertia rooted in policies and practices

Lack of a place where supply and demand can meet

School Operators:

Encourage states to revise procurement policies, examine regulations, and create permission structures for innovative learning models to emerge.

Federal Policymakers:

Create regulatory space within federal policy for innovative learning models to emerge.

State Policymakers:

Create opportunities for school operators to explore, engage, and partner with model providers.

Create regulatory space within state policy for innovative learning models to emerge.

Philanthropy:

Invest in the ecosystem required for model providing to succeed, including the advocacy for enabling federal and state policies.

Education Advocates:

Advocate for policies that shift the state and local landscape in support of innovative learning models.

Thinking Outside of the Box



In the middle of the twentieth century, maritime trade operated much as it had operated for more than 3,000 years, with goods in varying size and weight getting loaded and unloaded by hand at local ports. The process was time consuming and costly, often leading to damage and theft. This was true whether the labor was provided by the Phoenicians in 1500 BCE or by longshoremen in San Francisco in 1940.

But in the early 1950s, a trucker from North Carolina named Malcolm McClean thought it might be possible to bypass the increasingly congested interstate highways and instead put the containers from his trucks directly onto ships. Upon arrival at their destination, these containers could then be readily reloaded onto trucks or placed onto trains. He committed to this vision, sold his trucking company, and launched a shipping company that would ultimately bring about a new level of standardization and interoperability to the sector.⁷

McClean's paradigm-shifting idea was met with sharp resistance from shipping companies, regulators, and unions that were all accustomed to the industry's long-standing norms. Nonetheless, he persisted by converting war tankers into cargo vessels, retrofitting cranes to support loading, and opening ports.⁸ Over the next several decades, the shipping container would fundamentally alter and interconnect the global economy, making shipping far more efficient and secure. Today, an estimated \$14 trillion in goods spend some time inside of a big metal box.⁹

The story of Malcolm McClean is not only about the impact of a physical box. It is about the importance of thinking outside of one—and forcing others to do the same. The breakthrough inventions that fuel transformative societal progress in sectors such as health, energy, and communications are often the product of setting aside conventional wisdom, reexamining underlying assumptions, and exploring ways to deploy modern technologies to long-standing challenges.

It is past time to employ this same thinking to K-12 education.

Our nation's schools have been locked into the industrial paradigm of schooling, its own box, since the middle of the nineteenth century. It too is characterized by well-established traditions, fixed mindsets, entrenched interests, and a failure to imagine new ways of addressing persistent challenges.

The story of Malcolm McClean is not only about the impact of a physical box. It is about the importance of thinking outside of one—and forcing others to do the same.

The COVID-19 pandemic fully laid bare implications of continuing to rely on an approach to educational delivery rooted in the design and know-how from the Industrial Revolution. While many other sectors spent the last twenty years modernizing their core delivery models to leverage the internet and other modern technologies, the K-12 sector doubled down on efforts to try to optimize impact within the industrial paradigm of schooling, focusing on standards, teacher quality, curriculum, and accountability. As schools and communities shut down, many of the sectors that focused on modernization were able to thrive: the general public was still able to shop, watch movies, bank, and do much of what it could do twenty years prior, albeit more conveniently and effectively. But teachers were forced to scramble to bring their industrial-era classrooms online or to somehow make it work in a hybrid context. With little design and support behind them, they did as well as one could hope.

The results have been devastating for all students, but particularly for Black, Hispanic, and Indigenous communities. One study from McKinsey found that in the 2019–20 school year, elementary students learned 67% of what they would have otherwise learned in math and 87% of what they would have otherwise learned in reading.¹⁰ In schools that predominantly serve students of color, learning losses were more acute—59% and 77% respectively.¹¹

Parents had a front-row seat to remote and hybrid learning and came away frustrated. They saw how student motivation was a particular challenge: without the advantages of physical presence, many students struggled to drive their own learning, did not sufficiently engage, and fell further behind. But parent frustration seemed to extend beyond schools' pandemic-related shortcomings and more toward how schools were managing learning in general. One survey revealed two-thirds of parents worry about their child staying on track in school.¹² Another revealed they now want to see more fundamental change in how schooling happens.¹³ It found that support was strongest for education leaders who prioritize relevant and real-world learning experiences,



improved technology to better support instruction, greater customization to meet varied learning needs, and tools to support students' mental and emotional health.¹⁴



One study from McKinsey found that in the 2019–20 school year, elementary students learned 67% of what they would have otherwise learned in math and 87% of what they would have otherwise learned in reading.

Teachers are ready for more fundamental change, too. Before the pandemic, teacher satisfaction reached its lowest level in two decades.¹⁵ This may be one reason why the nation's two largest national labor unions have explicitly called for efforts to reimagine education in order to "meet all learners where they are and allow each to reach their full potential."¹⁶ Now, labor shortages are ubiquitous and more than a third of teachers are considering quitting.¹⁷ The pandemic forced

teachers to become more comfortable using technology, but the burden for reimagining what a classroom can look like cannot solely fall on their shoulders—there is already far too much they are asked to do.

The same holds true for system leaders. Calls for new approaches that allow students to progress at their own pace are now coming from some of the nation’s most prominent school superintendents, who are demanding a competency-based educational system that looks nothing like the current model.¹⁸ Many have also experienced steep drops in enrollment to virtual schools or other out-of-system options and recognize the need for more profound innovation in the ways in which they operate.¹⁹ Their primary levers of systemic reform have been limited to those focused on improving school governance, the capacity of teachers and leaders, and the adoption of new curricular solutions—all of which have resulted in highly variable student experiences and none of which have yielded the kind of transformative shifts in student outcomes necessary to enable true social mobility.

Perhaps no group has more to gain from a transition to a student-centered paradigm than students themselves. Prior to the pandemic, nearly one in three teens reported being bored all or most of the time, and a majority reported high levels of stress.²⁰ Students are the ones who must endure the often mind-numbing experiences that the industrial paradigm creates: the waiting on bells to release them from one class to the next, the rote memorization, the feelings of irrelevance (“Why do we need to learn this?”), the sense that school just is not engaging or doesn’t work for them, and the untapped potential and passions that school simply ignores or—worse—suppresses.

Our national system of schooling now finds itself at a crossroads. The pre-pandemic challenges centered on overall system performance are now compounded by even more pressing issues: devastating losses in learning,

The pandemic forced teachers to become more comfortable using technology, but the burden for reimagining what a classroom can look like cannot solely fall on their shoulders—there is already far too much they are asked to do.



Stress and Boredom are Fairly Common Among High School Students

How often do/did you feel this way at your high school?

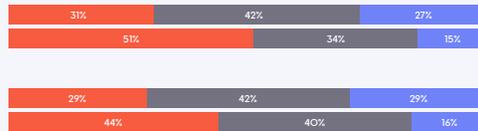
Stressed Out

Current HS Student
Post-HS Young Adults

Bored

Current HS Student
Post-HS Young Adults

■ All/most of the time ■ Some of the time ■ Barely ever/never



profound shortages in labor, and parent demands for greater levels of both personalization and mental health support. Addressing all of these needs is well beyond the bounds of what the industrial paradigm of schooling was ever designed to do.

Our national choice is clear: We can continue to define change as it has been defined for the last forty years—tacitly accepting that the industrial paradigm of schooling is still the best way of providing education and focusing on the *optimization* of its impact by trying to incrementally improve its core elements. Or, we can consider the possibility that the industrial paradigm itself is what must transform. Even though it was designed more than a century ago, the die it cast has severely limited the impact of well-intended efforts aimed at systemic improvement. Transcending these inherent limitations requires *modernization*—the development of a new paradigm for schooling that fundamentally reimagines the classroom itself so each student can fulfill his or her full potential.

Students are the ones who must endure the often mind-numbing experiences that the industrial paradigm creates: the waiting on bells to release them from one class to the next, the rote memorization, the feelings of irrelevance.

From an Industrial Paradigm to a Student-Centered Paradigm



In this section, we distinguish between two “paradigms” of education: the *industrial paradigm* and the *student-centered paradigm*. For each, we discuss a set of features inherent to it, including:

- the **purpose** of education that animates the paradigm,
- the **fixed design** tenets that govern how schooling is delivered within that paradigm, and
- the **resulting experiences** of students in that paradigm, which we believe emanate from the paradigm’s purpose and fixed design tenets.

While the distinctions between the two paradigms are not always truly binary, we paint the differences between these paradigms as starkly as possible to illustrate the profound shifts we believe are required.²¹

Understanding the Industrial Paradigm and its Inherent Limitations

Purpose

The industrial paradigm emerged to massively increase access to education and to rank and sort young adults into factory or agricultural jobs for a booming economy. Many men worked blue-collar jobs as mechanics, plumbers, bus drivers, warehouse workers, and road construction workers. During the first forty years of the twentieth century, women with high school diplomas increasingly found work in offices as secretaries and clerks.²² The fact that only one in four adults graduated high school in 1920 made little economic difference since nearly 40% of all jobs were in a booming industrial economy, all of which could be performed with a high school-level education.²³

The purpose of the industrial paradigm was not to provide a high-quality education for all students—particularly not for women or for students of color. With few exceptions, schools were hardly expected to serve Black students at all.²⁴ Asian, Hispanic, and students of other ethnicities and faiths, meanwhile, faced discriminatory and exclusionary policies and practices.²⁵ Students were tracked into educational and/or career paths based less on their aptitude than on their family’s affluence, race, ethnicity, or social connections.²⁶ Immigrant education in large cities was focused on cultural and national assimilation.²⁷

The purpose of the industrial paradigm was not to provide a high-quality education for all students – particularly not for women or for students of color.



Fixed Design Elements

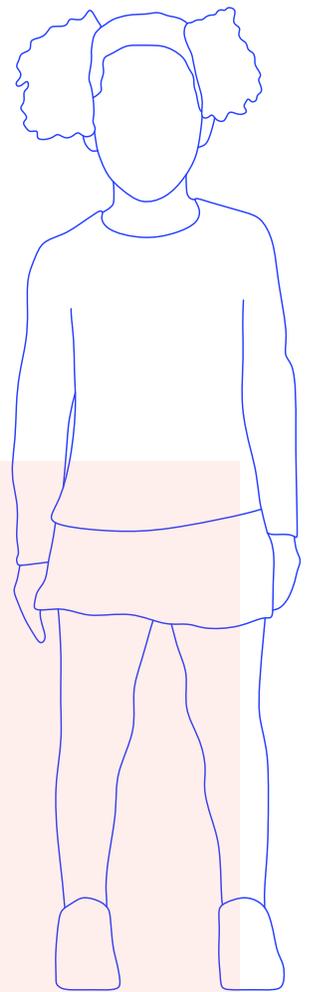
To fulfill this core purpose, schools were designed with the following fixed design tenets:

- Instruction would be organized around cohorts of same-aged students who would be assigned to a particular grade level (the age-graded classroom), with students progressing based on time rather than mastery
- Each grade level would focus on a uniform sequence of content for all students, organized by academic disciplines and codified in textbooks
- Teachers would direct learning, which would happen inside physical classrooms

Practically, these fixed design elements have had two profound consequences for more than a century.

First, they advanced fulfilling the core purpose of ranking and sorting students; a standardized, one-size-fits-all approach continues to winnow out those who cannot keep up.

Second, they logistically constrained the application of any future instructional innovation to whatever an individual teacher can readily use in the context of the age-graded classroom. Today, that means many of the breakthroughs in cognitive research or advanced technologies that could otherwise impact individual student learning, simply cannot be leveraged because they do not fit within these fixed elements.



Resulting Student Experience

When the fixed design elements of the industrial paradigm is brought to life across the roughly 130,000 U.S. schools, it shapes students' experiences in school in profound and uneven ways. We believe the resulting student experiences it produces are best reflected in Transcend's description of industrial-era learning.²⁸

1. Unequal Expectations & Opportunities

The expectations and opportunities learners experience are determined at a young age and are modest for most, high for some, disproportionately low for others, and too often based on factors connected to a learner's identity and background.

2. Narrow Focus

Learners engage in experiences focused primarily on the cognitive dimension of learning.

3. Rote Activities

Learners engage in memorizing and recalling a broad array of content and are assessed primarily on their ability to recall and explain this information.

4. Irrelevance

Learning is disconnected from young people's interests and goals, as well as the real professional, personal, and societal challenges and endeavors they encounter in life.

5. Assimilation & Marginalization

Learners from marginalized groups—such as people of color, LGBTQ learners, those living in poverty, multilingual learners, those with a disability, and others—are pushed to either conform to the dominant culture or risk alienation.

6. Reinforcement of the Status Quo

Learners' experiences are situated within societal structures related to race, class, gender, sexual orientation, ability, and more that are implicitly accepted, directly perpetuated, or studied in ways that do not motivate massive change efforts.

7. Isolation

Building strong relationships is not prioritized; learners and adults work together in the same space, but often without knowing one another deeply, and teaching and learning approaches prioritize independent work and competition.

8. Inflexible Systems

Learners experience rigid structures and policies that batch those of the same age together and engage them in the same content through the same activities at the same pace—holding some learners back from more advanced content and activities and leaving others behind.

9. Passive Compliance

Learners are expected to passively absorb the knowledge, skills, mindsets, and behaviors modeled and taught by adults and are pushed to comply with rules and routines developed for them through extrinsic rewards and punitive consequences.

10. Siloed Schooling

Learning is largely confined to school—a physical space with a fixed schedule and teachers who take on all, or most of, the responsibility for educating students—and learning outside of school is far more available to those with substantial economic and social capital.

While there is undoubtedly variation from classroom to classroom, on the whole, these experiences directly emanate from the purpose and fixed design elements of the industrial paradigm when implemented at scale.

Imagining a Student-Centered Paradigm and Its Inherent Opportunities

If students' experiences in schools were not shaped so deeply by the fixed design elements of the industrial paradigm, how might they be different? What would they look like? And how would they be brought to life?

Purpose

Because a student-centered paradigm is not rooted in the legacies of ranking and sorting, it can be designed around a very different purpose—one we believe should be centered on ensuring **a high-quality education for all students in order to unlock their full potential to thrive and contribute to the world around them.**

Success in achieving this broader purpose would be reflected in a wider set of indicators than in the industrial paradigm. Success would still reflect strong levels of growth and mastery in academic realms, including reading and math, and this paradigm would not accept as success any disparities in accomplishment based on factors such as race, class, or any other identity markers.

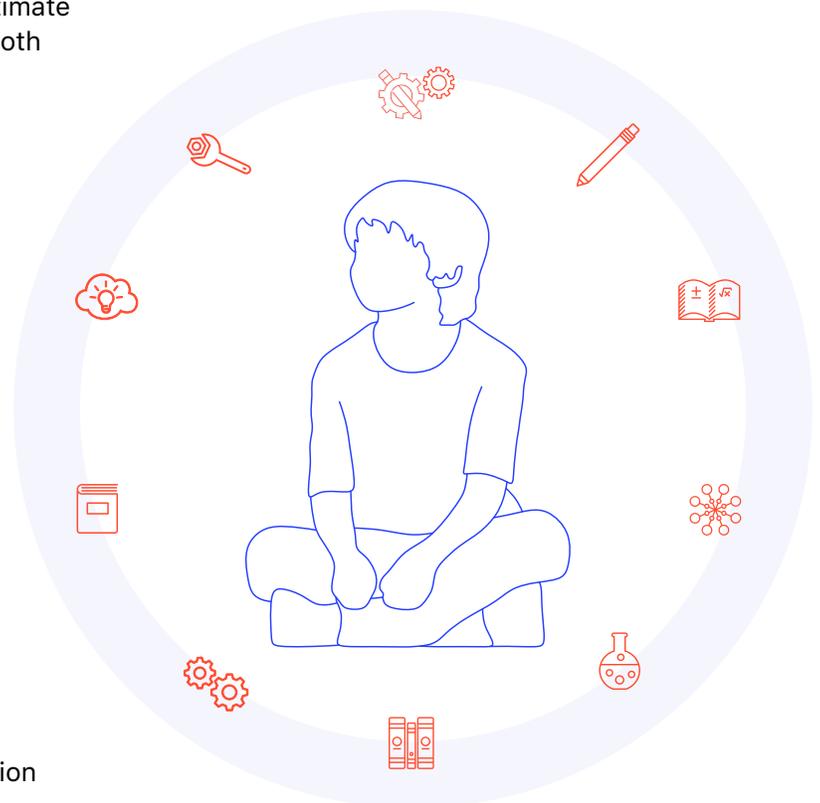
But this is only the beginning, not the stopping point. In a student-centered paradigm, success is marked by learners finding their personal pathway through multiple, unique channels of intellectual and personal growth, as well as economic mobility and access. The ultimate goal of this paradigm is for students to thrive—both during their formal education and in what comes after—not only for the sake of their personal benefit, but so they can contribute to their communities and others around them.

Fixed Design Elements

A student-centered paradigm could incorporate design elements that are unconstrained by fixed requirements for age-grade, teacher-directed, whole-class instruction. Freed from that limitation, designs within a student-centered paradigm can then focus directly on the experience students would have in order to achieve this new purpose.

Resulting Student Experience

We believe Transcend's Ten Leaps for Twenty-First-Century Learning provide the best articulation of how the resulting student experience within the industrial paradigm contrasts with what students experience in a student-centered paradigm.



10 Leaps for Twenty-First-Century Learning

Industrial Paradigm

Unequal Expectations & Opportunities

The expectations and opportunities learners experience are determined at a young age and are modest for most, high for some, and disproportionately low for others, too often based on factors connected to a learner's identity and background.

Narrow Focus

Learners engage in experiences focused primarily on the cognitive dimension of learning.

Rote Activities

Learners engage in memorizing and recalling a broad array of content and are assessed primarily on their ability to recall and explain this information.

Irrelevance

Learning is disconnected from young people's interests and goals, as well as the real professional, personal, and societal challenges and endeavors they encounter in life.

Assimilation & Marginalization

Learners from marginalized groups—such as people of color, LGBTQ learners, those living in poverty, multilingual learners, those with a disability, and others—are pushed to either conform to the dominant culture or risk alienation.

Reinforcement of the Status Quo

Learners' experiences are situated within societal structures related to race, class, gender, sexual orientation, ability, and more that are implicitly accepted, directly perpetuated, or studied in ways that do not motivate massive change efforts.

Isolation

Building strong relationships is not prioritized; learners and adults work together in the same space, but often without knowing one another deeply, and teaching and learning approaches prioritize independent work and competition.

Inflexible Systems

Learners experience rigid structures and policies that batch those of the same age together and engage them in the same content through the same activities at the same pace—holding some learners back from more advanced content and activities and leaving others behind.

Passive Compliance

Learners are expected to passively absorb the knowledge, skills, mindsets, and behaviors modeled and taught by adults and are pushed to comply with rules and routines developed for them through extrinsic rewards and punitive consequences.

Siloed Schooling

Learning is largely confined to school—a physical space with a fixed schedule and teachers who take on all, or most of, the responsibility for educating students—and learning outside of school is far more available to those with substantial economic and social capital.

Student-Centered Paradigm

High Expectations with Unlimited Opportunities

All learners experience high expectations and have equitable access to many opportunities, enabling them to progress toward their aspirations for themselves, their families, and the community—regardless of the time and support needed.

Whole-Child Focus

Learners engage in experiences that nurture the totality of cognitive, emotional, social, and physical factors that impact their learning, development, character, and overall health and well-being.

Rigorous Learning

Learners use critical thinking skills to make deep meaning of diverse, complex ideas and are assessed on their ability to apply, analyze, and use their knowledge in creative ways across contexts

Relevance

Learning explores young peoples' interests and goals, is connected to their communities, and enables them to understand and tackle real problems in authentic contexts.

Affirmation of Self & Others

Each learner develops a unique, positive sense of self and purpose as well as a deep respect for the identities of others; these diverse identities are celebrated, nurtured, and leveraged in meaningful and anti-oppressive ways to support everyone's learning.

Social Consciousness & Action

Learners critically examine social problems and work toward a more just world; they develop the knowledge, skills, and mindsets needed to continue taking anti-oppressive actions that disrupt and dismantle racism and other inequities.

Connection & Community

The environment is relationship-rich: learners are deeply known and respected by a variety of adults and peers; collaborate closely; and form meaningful relationships across lines of difference that nurture empathy, foster belonging, support well-being, and build social capital.

Customization

The focus, pace, and sequence of learning, as well as the resources and supports provided, are tailored to each learner's identity, prior knowledge, development, way of learning, and life experiences, ensuring that all learners have what they need to be successful and those who need more receive more.

Active Self-Direction

Young people are active drivers of their learning; they grapple directly with concepts while receiving adult and peer guidance and support; they have a voice in decisions about how and what they learn, so that the process grows agency and meaningfully builds on their interests and prior knowledge.

Anytime, Anywhere Learning

Learning can happen anywhere and at any time for all learners with teachers, families, community members, and other important figures in a young person's life all playing important educational roles.

None of the leaps above are binary—they all represent a spectrum between the industrial paradigm on the left and a student-centered paradigm on the right. Further, a particular classroom or school community may not fully embrace all of the Ten Leaps. Some may focus on just a handful of the Ten Leaps, depending on the scope of the model. For instance, a competency-based approach to math education may place a greater emphasis on customization, rigorous learning, and active self-direction; a social studies program may focus more on relevance, connection and community, and social consciousness and action; and an initiative to embed social-emotional learning alongside academics may focus on the whole child and affirmation of self and others.

Moreover, making any one of these leaps—let alone multiple or all of them—is never easy, particularly given the strong pull of the industrial paradigm and the systemic forces that make it challenging for schools to fully embody a student-centered paradigm. Difficult as it may be, it is what must happen in order to shift from the industrial paradigm to a student-centered paradigm.



Industrial Paradigm

vs.

Student-Centered Paradigm

Purpose

Sort and rank adults into factory roles

Purpose

A high-quality education for all students in order to unlock their full potential to thrive and enable them to contribute to the world around them

Fixed Design Elements

Same-aged cohorts assigned to grade-level based on age

Uniform content for all students

Teacher-directed learning inside physical classrooms

Fixed Design Elements

Designed to deliver the Resulting Student Experience

Resulting Experiences

Unequal expectations and opportunities

Narrow focus

Rote activities

Irrelevance

Assimilation and marginalization

Reinforcement of the status quo

Isolation

Inflexible systems

Passive compliance

Siloed schooling

Resulting Experiences

High expectations with unlimited opportunities

Whole-child focus

Rigorous learning

Relevance

Affirmation of self and others

Self-consciousness and action

Connection and community

Customization

Active self-direction

Anytime, anywhere learning

Systemic Implications

One-third of students college and career ready

Persistent gaps in achievement across racial, ethnic, and economic lines

Stagnating performance on international benchmarks

Unsustainable role for teachers

Limited role for parents

Few levers for systemic reform

Systemic Implications

Vast majority of students achieve college and career readiness

Performance not predictable based on racial, ethnic, or economic identifiers

Significantly improved performance on international benchmarks

Sustainable role for teachers

Integrated role for parents

More levers for systemic improvement



The Role of Innovative Learning Models



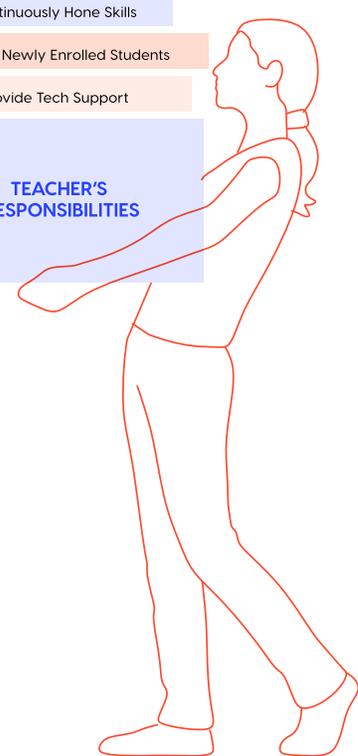
If a student-centered paradigm requires new approaches to teaching and learning so students can experience the Ten Leaps, then those experiences must be designed somewhere. The burden of that design cannot fall solely on the classroom teacher given the challenges of fulfilling their broad set of duties reflected in their current role. Just as the airline pilot does not also design the airplane, and the doctor does not discover breakthrough pharmaceuticals, classroom teachers do not generally have the time and/or expertise to alone comprehensively redesign the student experience in school—particularly if those designs are to fully leverage educational research and advanced technologies.

What is instead required are design teams that include those with teaching experience as well as others with expertise in areas such as instructional design, education research, assessment, cognitive science, child and adolescent development, classroom workflow, data, and technology. The goal of their work is to create comprehensive programs in different subjects and/or grade-spans that can be adopted by schools in order to actualize a student-centered paradigm.

We call these adoptable programs *innovative learning models*.

The Essential Features of Innovative Learning Models

A **learning model** (which we sometimes refer to as a model) is a school-based program that bundles together an interconnected set of tools, resources, systems, and instructional practices in order to shape student learning experiences toward clear objectives. Learning models may encompass the operation of an entire school or focus on a specific subject (e.g., math) or function (e.g., schoolwide culture and practices).



A learning model typically integrates:

- an instructional design that thoughtfully incorporates components such as content, assessment, educational research, and the science of learning and development;
- an aligned set of pedagogical practices that is sustainable for teachers and leverages what they're uniquely suited to do;
- an operational design that reimagines teacher workflow, the use of time, and classroom design;
- and a technological design that embeds the use of student-level data and relevant technological tools to realize the model's vision

In the industrial paradigm, teachers are responsible for determining how best to integrate these elements into their classroom practice—often with the aid of discrete tools such as textbooks and digital products. While some schools and school networks have designed and implemented more explicit learning models that tightly govern teachers' pedagogical practices, workflow, and instructional materials, these models generally operate within the industrial paradigm.

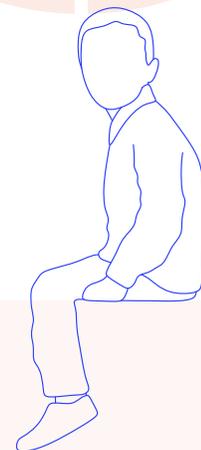
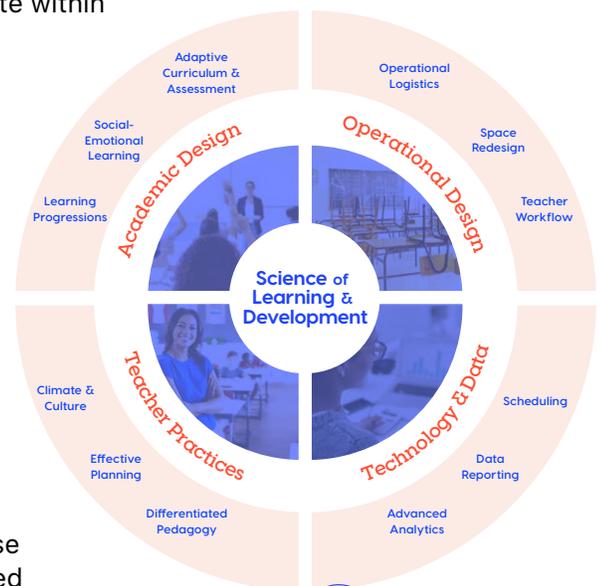
Innovative learning models are models that enable the actualization of a student-centered paradigm. They allow for schools to pursue a fundamentally different purpose and make many of the Ten Leaps in student experiences by cohesively integrating these elements in ways that can be adopted by schools that want to shift to a student-centered paradigm.

The Role of Model Providing

If innovative learning models are to support the transition away from the industrial paradigm, they will need to emerge within the context of an ecosystem designed to support their development and adoption. While sectors such as energy, healthcare, and defense have preexisting ecosystems of organizations focused on and funded for breakthrough research and development, adoption, and systemic advancement, no such equivalent exists in the K-12 education sector.

Schools and districts, the most ubiquitous K-12 actors, are generally ill-equipped to undertake this kind of research and development. They are built to operate schools, not to redesign them. Further, many third-party organizations that support schools are also built and funded to serve the existing paradigm: universities train classroom teachers to succeed in the industrial paradigm while publishers create textbooks and software products for the industrial-paradigm classroom. That is what school operators typically demand of them.

Innovative learning models are models that enable the actualization of a student-centered paradigm.



Given the lack of a preexisting ecosystem in place to support the modernization of schooling itself, the authors of this report are calling for the emergence of a new sector, **model providers**, to serve as a key component in facilitating this overdue transition.

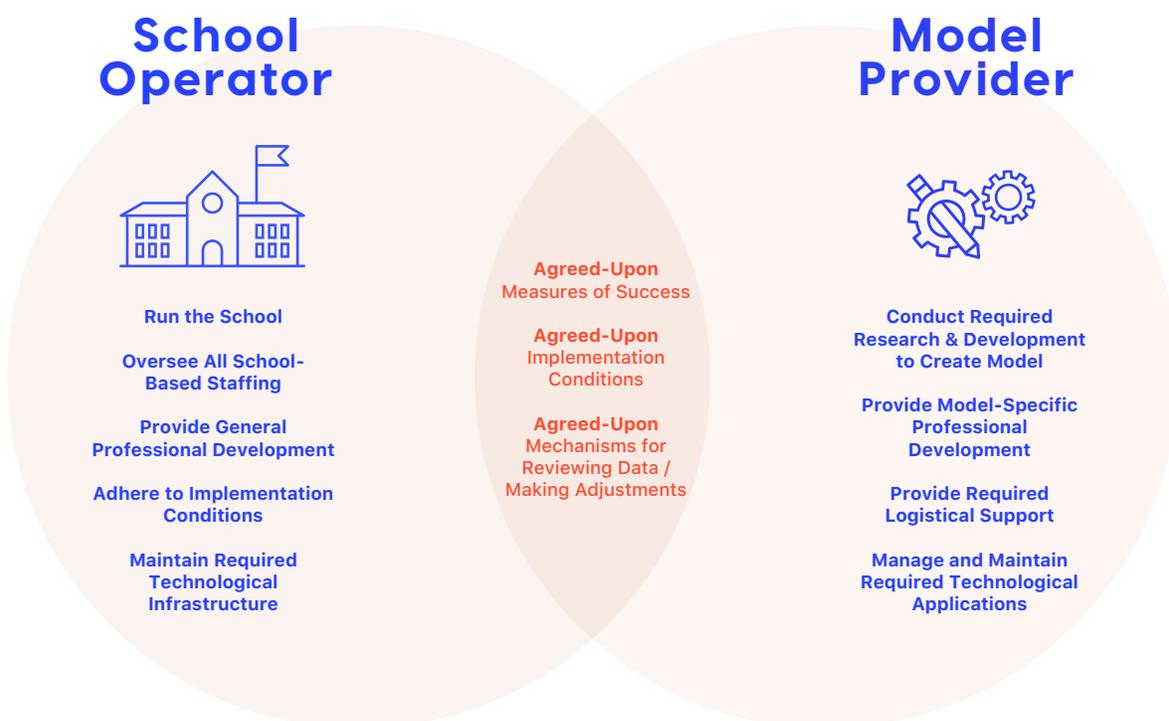
Model providers are organizations built to support these two essential ingredients required to facilitate the transition from the industrial paradigm.

First, model providers oversee the thoughtful design of innovative learning models through extensive research and development. They assemble the diverse talents of academicians, technologists, researchers, experts in child and adolescent development, creatives, and others to deeply understand what school communities want their students to experience and then design new models that reflect those aspirations in collaboration with pilot schools. The ultimate objective of these efforts is to create learning models in different subject areas and grade spans that can deliver on those aspirations and that can ultimately be implemented by schools within their existing public resources.

Second, once new models are designed, model providers are then able to support their implementation across a broader number of school communities who share in a similar vision for what students should experience. While school-based leadership is directly responsible for implementation, the model provider offers extensive, ongoing support to participating educators and shares in the accountability for student outcomes. Model providers can provide direct support to schools, or can do so through designated third-party organizations.

Innovative model providing is still very much in its infancy. Some model providers spent several years in the design phase, iterating on their models to drive impact and learning what it will take to support widespread adoption in the future. Others have models that are more mature and are operating at broader levels of scale.

Transcend collaborates with several emerging model providers such as Valor Collegiate and Van Ness Elementary within D.C. Public Schools, both of whom have existing products or programs that have the potential to evolve into



widely adopted learning models. These and many other organizations advance Ten Leaps in different ways and in different contexts, though, without the ecosystem and permission structure contemplated in this paper.

The Model Development Process

Organizations come to model providing in different ways:

- New Classrooms emerged from an initiative within the New York City Department of Education called School of One that was focused on using technology to better support personalized math instruction.
- Gradient Learning's model originated within Summit Public Schools, a network of charter schools first founded in California, where it focused on using learning science research to build a customized, mastery-based curriculum that could be shared with others.
- Valor Collegiate, a Nashville-based charter network, developed the Compass Model centered around holistic human development. In response to high demand and interest from across the country, they developed "Compass Camp," a three-year cohort-based intensive for becoming certified in Valor's model.
- EL Education was born out of a collaboration between the Harvard Graduate School of Education and Outwardbound USA. This model focuses on creating uniquely experiential, hands-on learning experiences to build mastery of knowledge and skills, character, and high-quality student work.
- Transcend's work began through its partnerships with schools to develop and share innovative models of various sizes, topic areas, and age-levels and in various ways.

There are numerous other pathways into model providing. Education publishers, researchers, school operators and support organizations, technologists, entrepreneurs, among others all bring key ingredients to the model development process that can serve as a foundation for the development of high-quality innovative learning models. It is vital that each team member deeply understands what educators and school communities want their students to experience so they can best design new learning models in ways that enable schools to fulfill those aspirations.

Model development teams benefit from a broad diversity of backgrounds and experiences as well as a balance of creative and execution capabilities. They may include educators with a deep understanding of specific pedagogical domains (e.g., elementary science and high school math); operational specialists who can focus on the logistics required for schools to



implement a model; technologists who can help to oversee the related software, hardware, and data needs; practitioners who can help to provide the requisite training and support required to bring a model's vision to life; and researchers who can provide relevant scholarship as input into model design and support the continuous understanding and improvement of the model itself. Last but not least, students and families may also have a critical role to play in model development, whether in providing insights to include in initial iterations, or in providing feedback and ideas for continuous improvement.

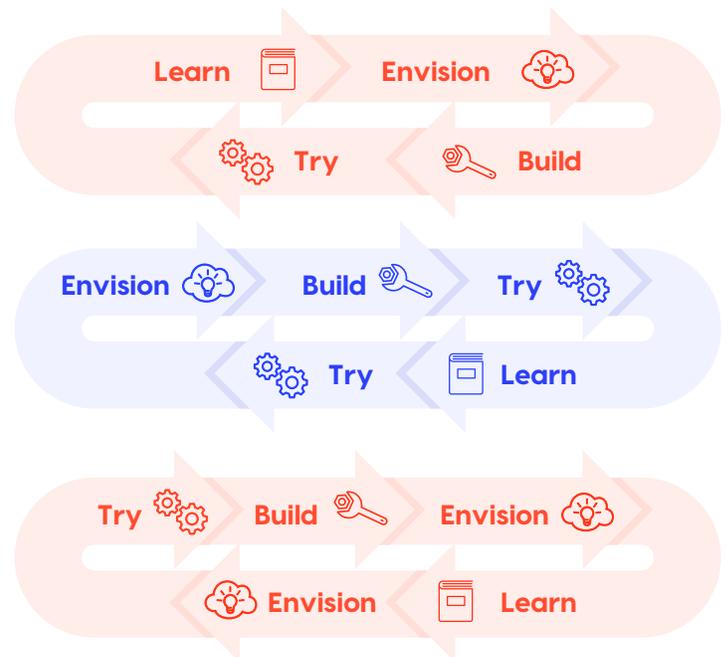
While there are few hard-and-fast rules to model development, there are some common inputs and activities that we have seen in our collective work. We describe them here in order to demystify the process and support the success of others who wish to pursue this path. The activities of model design can be represented in an iterative, ongoing cycle of design and insight creation. It is important to note that these activities can be entered by model providers at any stage and can be applied at various grain sizes, from small components of a model to the full model. We refer to it as a cycle of design and insight creation because each activity is essential to the design process, and every step also produces essential insights.

Sometimes model providers may sequentially cycle through each of the activities, while other times they may need to backtrack or repeat an activity. In lower stakes instances, designers may be able to move to trying a model (or a model component) first, learn from that experience, and then reenvision and build. In higher stakes circumstances, it may make more sense to spend more time in the envisioning and building phase before trying.

Learn

Model providers must carefully learn about—and with—their users (students, educators, and parents or caregivers), their content area, and about the relevant research. All of this informs their initial envisioning, building, and testing. As they go through the cycle and test initial prototypes of the model, they learn important insights that allow them to refine the vision and continue into the next iteration of the model development cycle. Some lessons will become clear

Sample cycles of the model development process are depicted below.



within days, while some will take far longer. Some challenges can be solved overnight, while others may require substantial redesign and multiple iterations. With each iteration, model providers grow closer to realizing their optimal vision and impact.

Importantly, a broad set of stakeholders has an essential role to play in the process of learning. Students can have extraordinary insights on how they experience various design choices and invaluable ideas for how to improve upon challenges. Teachers can provide feedback on how the various tools and resources support implementation of the model, what worked or did not work as intended, where additional clarity or training may be necessary, or how students in the classroom engaged with the new approach. Parents and families, meanwhile, can reflect on how the school and developer communicate the vision and design of the model, as well as how well the model meets the needs of their children and community.

Envision

Insights that come from the learning process allow model providers to shape and refine their visions at greater and greater levels of specificity. The work of model providers typically begins with determining whether the model will focus on a particular subject or grade span. A more narrow focus may allow for deeper levels of research and development and creativity, while a broader focus may help to better facilitate the use of interdisciplinary learning and schoolwide coherence.

Once a scope is determined, the work of envisioning what students could experience in an adopting school begins to unfold. In doing so, teams may want to consider the core instructional objective(s), the design tenets that will undergird the model (see The 10 Leaps for Twenty-First-Century Learning on page 22 as examples), and what an optimal teacher and student experience would be to best support achieving that vision.

Model providers should be mindful that the constraints imposed by the industrial paradigm are not the only constraints at play. Preexisting mindsets about how schools have operated in the past can limit creative thinking about what's possible. So too can a lack of knowledge about what is technologically, financially, or operationally possible. To mitigate the risks of thinking too narrowly, model developers may seek out a set of advisors with expertise in areas that the team may be lacking. They may also look for inspiration and guidance from those in other sectors or in other states and countries. The envisioning phase can readily set the boundaries for future iteration—model developers should be sure they are thinking expansively.

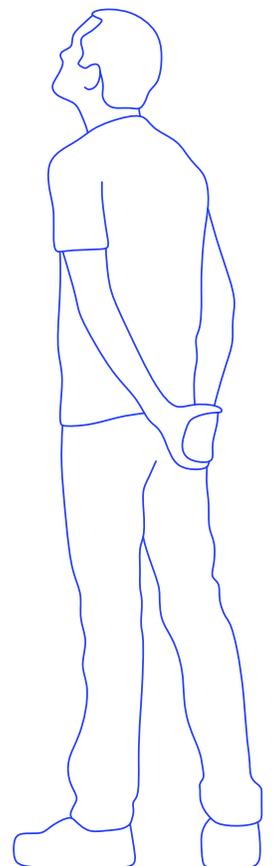
Research should also play a key role in the development of new models, particularly as it relates to the science of learning and development. Grounding model design in existing research ensures they are built on a strong theoretical foundation and can help to surface outcome measurements that may extend beyond traditional measures of student growth and proficiency. At the same time, developers should bear in mind that most educational research conducted in school-based settings has been conducted on interventions operating within the industrial paradigm, and with industrial-paradigm measures of success. Some lessons may apply, and some may not.

Deeper Design

As a vision for a new model begins to emerge, developers will begin to explore the deeper questions to help them refine their initial vision and to begin to understand what it will take for the model to be realized. Some developers may take an inquiry-based approach to building the components of the model by examining questions such as:

- What are the practices and rituals that define the learning environment?
- What knowledge, skills, and mindsets must adults have to implement the model?

Model providers should be mindful that the constraints imposed by the industrial paradigm aren't the only constraints at play.



- How will students and teachers spend their time?
- How will students and teachers interact with the community?
- How will the physical space for learning be organized?
- What is the role for stakeholder communities in designing and implementing the model?
- What technological supports are necessary to support the model?
- How does the model use schools' financial resources?
- What policies may be in place that can thwart the implementation of the model?
- How will students, teachers, and families monitor success and progress?

A thoughtful exploration process can then result in a preliminary design for an innovative learning model that can actualize its broader vision.

Build

Once a preliminary design of an innovative learning model is established, model developers must then work to pull together the various tools, resources, systems, and workflows to bring the design to life. That can include:

- The creation and/or sourcing of applicable instructional resources
- Requirements for technological tools and data sources
- Specifications for any required technological development
- Job descriptions and training materials for participating educators
- Physical layouts of classroom space and requisite furniture
- Plans for determining how to spend classroom time
- Integrated tools for learning outside of school
- Mechanisms for communicating about student progress with families
- Expectations and requirements for participating school partners

In the initial phases, many model providers will choose to operate their models more manually, as teams gather more clarity about what exactly will ultimately be required. For more technologically infused visions, the use of prototype technologies and off-the-shelf tools can help to accelerate learning before a more serious technological investment is required. As the design team begins to develop solutions that partially or fully realize the model's vision, it will often work toward building a prototype model from which it can then begin to iterate.

Is This Experimentation?

Some ideas reflected in this report will raise concerns about experimentation, especially on our nation's most vulnerable student populations. Innovative learning models are not proven solutions, and the time students spend in school is both precious and highly consequential to their future.

At the same time, there are several ways to mitigate these risks. In the earliest stages of model development, adoption can take place in summer- or after-school contexts, ultimately evolving into the regular school year only after data can be gathered on the model's operational and academic impact. In addition, model providers may wish to deploy researchers into initial pilot sites so that information can be collected without delay and the models themselves can be quickly adapted based on real-time information.

It is also important to note that experimentation is common across the vast majority of classrooms, as individual teachers experiment with different lessons and different classroom approaches all the time. Indeed, this level of experimentation helps them to learn and improve their practice. These experiments take place quietly, often unbeknownst to anyone but the classroom teacher and with little data that could benefit the system more broadly.

Innovative learning models carry with them the potential for a far more responsible and transparent approach to experimentation that can also support a virtuous cycle of research and application.



New Classrooms began to build its model by generating hundreds of questions about everything from the definition of a “skill” to the role of a teacher; grouped the questions into categories; and used the groups as the basis for identifying design tenets for their model. These tenets, which included multimodal learning and collective ownership by teachers, became foundational to the components of *Teach to One 360*.

Try

Collaborating with pilot schools to implement either the full model or some of its discrete components is an essential part of the development process. Model developers may want to focus their early iterations on operationalization to answer the question: Is it possible?

In some cases, it may be also possible to simulate the implementation of a model or model component in order to learn more quickly. But at some point in the process, understanding the viability and impact of the model will require working with real students and teachers.

Early iterations may best be suited for summer- and after-school settings, where models can be

refined in a lower-stakes context before adoption in the regular school year. As information is gathered and adjustments are made, implementation can shift to the regular school day. In both types of settings, designers may wish to have teams on-site to rapidly address any new challenges that emerge.

Of course, trying a new model, particularly one that challenges many of the assumptions that undergird the factory model classroom, can initially seem risky. There will almost always be a gap between the model envisioned and what happens when it is implemented in a real classroom. However, by grounding the model in research, piloting it on a small scale, and ensuring the design team can make real-time adjustments, model developers can minimize the risk while maximizing the opportunity to learn and refine the model over time and across different contexts.

Ongoing Iteration of Model Development's Design and Insight Process

The process of iteration is an essential element of model development. It allows a developer to see its design in action, observe where the model does or does not operationalize as intended, learn about how the model can expand to a broader set of pilot schools, and identify elements of the model that require reworking. For instance, in early pilots, New Classrooms realized it designed its model with a focus on personalized learning for each student, but did not fully consider how the approach inadvertently created inequities in daily teacher workload within a school. Subsequent iterations were able to correct for this shortcoming.

Iteration can also allow developers to pilot different features that have the potential to be highly impactful, but may need to be implemented more manually at first. For example, New Classrooms' initial approach was to manually generate personalized schedules for each student each day, based on daily assessment information. In early iterations, the process could take as many as 11 hours to complete for fewer than 100 students. But completing the process manually built a better understanding of what it would take to schedule thousands of students at scale. The organization has since built the capacity to generate thousands of student schedules each day within minutes.

Ongoing iteration in response to feedback from the field is a necessity and a unique strength among innovative model providers. Gradient has continuously iterated its training experience based on evolving best practices in professional development. It recently redesigned its educator training to allow educators to virtually attend a series of courses, keeping teachers in the classroom and empowering them to put their learnings into practice right away. Valor Collegiate simplified its Compass Model to be more user-friendly and shifted its training program from a two-year to a three-year experience, with the first year focusing exclusively on adult-implementation.

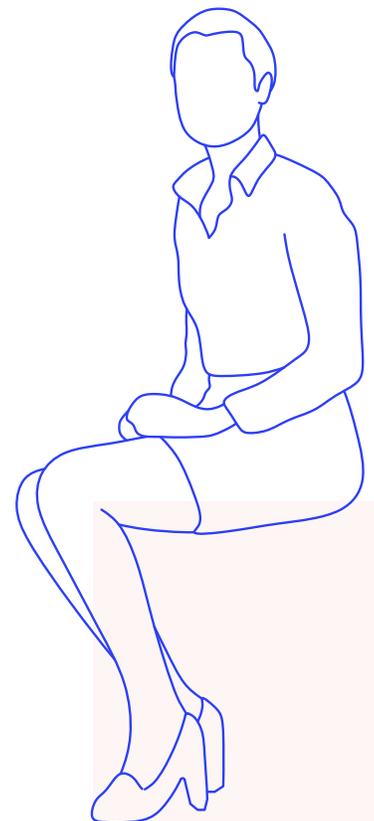
The iteration and learning process provides essential opportunities to observe and reflect on the model, including challenges of implementation and where additional work is necessary to align and ground the model in research. It can also help developers decide when the model is ready for “beta testing” at more school sites. Trying the model across multiple contexts provides additional opportunities to observe the model and its impact. Why did one element of the model seem to work better in one grade level than in others? Why did the results of the model vary at a second school site, or between schools serving different student populations? Did the model produce inequitable outcomes across student groups? Are additional tools or resources necessary to support implementation? Did implementation of the model vary between sites with different levels of stakeholder engagement?

The number of beta-testing cycles required depends on the complexity of the model, the developer’s ability to assess and fill gaps, and when a developer decides a model is ready to scale more broadly. There are no right answers on when a model is ready to scale, just a delicate balance between when a model is not developed enough and new schools will not have the tools or resources they need to realize the model’s benefits; and when a model is too developed and overly rigid tools and resources constrain the adaptation of the model to local needs and contexts.

Often, the decision to scale a model starts out as an incremental one—from trying a model at one site, two sites, and a handful of other sites, developers can learn more and more about what works and what doesn’t, and in what contexts. For example, Van Ness Elementary School in Washington, D.C., partnered with Transcend to help develop a student-centered model that prioritizes social-emotional needs alongside academic skills. After three years developing its model in house, Van Ness and Transcend first shared its approach with a small cohort of five other elementary schools in the district. It is now expanding that cohort to ten schools in D.C. as well as with schools in Tennessee and Texas.

Model development requires deep and flexible partnerships with school operators who can serve as partners during the initial development process. Teachers in partner schools can provide invaluable feedback to model providers as they work through model iterations. And the closer the design team is to seeing how their designs come to life in schools, the more effective they can be at learning key lessons and supporting continuous improvement.

Trying the model across multiple contexts provides additional opportunities to observe the model and its impact.



The Model Adoption Process

At some point, when the model provider is ready to scale the model beyond its pilot schools, its function shifts from model development to model providing. To reach this milestone, the developer must build out a plan for partnering with additional schools to adopt the model, including codifying the model in a comprehensive set of tools, resources, systems, and instructional approaches as well as the playbooks, how-to guides, and a sequence of activities to support implementation.

Connection

To begin the process of scaling and adoption, providers and schools must connect with one another. For the provider, this may include broader communications about the existence and capabilities of the model, as well as outreach to school and system leaders in forward-leaning jurisdictions.

Either on their own or with the support of state and district leaders, schools must actively look for models and providers; they must have invested in building their knowledge and capacity to engage with a provider, including the individuals and institutions that govern the school. They must define for themselves what they are looking for and the goals they hope to achieve, and begin to explore potential models that share a common vision. They may even choose to release a Request for Information (RFI) or Request for Proposal (RFP) to further understand the model provider landscape and set up subsequent stages of exploration and adoption.

Early Exploration

Only once providers and schools have connected with each other can they begin early-stage conversations about the model, the fit, and the potential for partnership.

On the partner school's side of the equation, the process requires exploring models that are aligned to the school's needs and goals, building enthusiasm for a model provider within their own teams and governance structures, and vetting potential partners for their ability to operate successfully given local constraints. Regardless of the role community stakeholders played during the model development process, the alignment and support of educators, parents and families, and community leaders is essential for the success of the partnership. Stakeholder support can help to bolster strong implementation, open feedback loops, and build commitment to adapting the model to local contexts.

Stakeholder engagement can also sway state and district leaders whose support or opposition to the approach could significantly affect the ability of the partnership to achieve long-term success. When a school is doing something innovative, state and district leaders can support model implementation by championing the effort to colleagues, expediting waivers for policy barriers, and providing political cover in school board meetings and with the media—all of which are easier for state and district leaders to do if the school's stakeholders are also behind the effort.

Readiness

While school and district administrators are often the decision makers in the adoption process, it is the partnership between model providers and participating teachers that often determines the success of the model itself. That is why providers and participating schools will want to take the time to understand whether the model is a good fit for a particular school community.

Through our own experiences supporting the adoption of new models, we have seen how important it is to define the readiness conditions necessary for a model to thrive in a new school. Assessing the conditions for innovative

learning models is an essential part of the adoption process, and includes an assessment of the policy conditions in the state and district, the conditions of school infrastructure, as well as the conditions in the school community.

For this process to be successful, the provider must clearly articulate the outcomes and objectives the model is designed for and the school must articulate the outcomes and objectives they hope to achieve. The provider must have a clear description of how the model is operationalized, while partner schools must have a sense of how their current school design will need to change to support success. A provider must have clarity about how the model can be customized to a local context and what elements of the model are nonnegotiable; a school must have a sense of the conditions on the ground and where existing systems, structures, or policies may create challenges.

A readiness conversation can also surface any key logistical requirements and how they might be addressed. Some models may have requirements that relate to the number of students served, the available staff, physical space, and technological infrastructure. All of these requirements should be transparently communicated and thoroughly understood so both parties understand what is required for a successful implementation.

Ensuring Successful Adoption

The successful implementation of an innovative learning model requires a close collaboration between the model provider and the partner school. Both bring a unique set of capabilities, but neither can be successful in the implementation of a student-centered paradigm without the effective and ongoing partnership of the other.

Prior to formulating this type of partnership, school communities should ask themselves where they are on—and how best to cultivate—five vital conditions, which Transcend terms the “5Cs:”²⁹

Conviction: A deep and sustaining belief in the importance and potential of the work being undertaken that fuels engagement and ensures it is prioritized among school leaders and staff members.

Clarity: A comprehensive and crisp understanding of the work ahead that provides direction and a path forward.

Capacity: The support of personnel, funding, and time required to successfully design and implement a transformative school design.

A provider must have clarity about how the model can be customized to a local context and what elements of the model are nonnegotiable.



Coalition: The support of committed stakeholders (e.g., school administrators, parents, students, teachers) who are helping the work become a sustained success.

Culture: Values, norms, and practices that support innovation and learning in the interest of improved opportunities for young people.

Before the provider and the school move forward with a partnership, they should get clarity on the roles and responsibilities of each entity, where (a) a school lays out its expectations for support from the provider and the outcomes the model promises to achieve and (b) the provider lays out its expectations for the conditions for implementation and school leadership and community's buy-in to the process of collaborative problem-solving.

Ultimately, with strong alignment on goals and needs, and a shared understanding of roles and responsibilities, a provider and a school can move forward with a partnership.

The Model Implementation Process

Once a model provider and a school agree to partner with one another, both parties share in the responsibility for student outcomes. Providers are not short-term contractors or a service provider—they are partners in the work. Similarly, school leaders and stakeholders are not passive recipients of an intervention—they are active contributors and collaborators.

In the early stages of preparation and implementation, the provider and a school work closely together so participating educators become well acquainted with how best to implement the model, including new terminology, new workflows, and use of new technological tools. They may also work together to redesign classroom space, adjust the school schedule, install the requisite technological infrastructure, and develop a communications plan for participating families.

As the school year progresses, both parties should expect the inevitable hiccups that emerge—a component of the model that did not work as expected, a staffing shift that was not anticipated, or a technological glitch that popped up. A strong foundation of trust built during the exploration phase provides the necessary culture of collaboration to work through these challenges. There will likely be some level of continual iteration, especially in the first few months.

Providers and partner schools should agree upon timelines for reviewing key data points and for exploring any adjustments to the model or its implementation in response to that information. They should also agree upon how and when data and key learnings are shared with key stakeholders both inside and outside the school.

Some districts will want to pilot an innovative learning model in a small number of schools in order to determine whether a broader roll-out is

Compromising for Adoption

Model providers work closely with school communities across the country who aspire to transcend the limits of the industrial paradigm and are inspired by their dedication to overcome the inertial forces it can often exert. It is in these schools where the true promise of a student-centered paradigm can take root.

At the same time, providers also work in school communities where practical considerations necessitate some level of compromise from the key tenets of their models. This can be especially true when the barriers to a student-centered paradigm become more intense (e.g., more stringent accountability for grade-level assessments) or when new leaders whose vision is more aligned with the industrial paradigm are introduced into the decision-making structure.

Observers of innovative models in action will often see evidence of a mix of industrial- and student-centered practices as a result of these compromises. While we believe innovative learning models hold great promise for enabling the widespread transition to a student-centered paradigm, we do not believe such an effort can succeed without more concerted and intentional efforts aimed at creating the space and permission structure for that to happen.

warranted. While this approach can help test the adaptability of a model in a local context, schools may want to ask district administrators and/or representatives from other schools to hold off on visiting until after participating teachers have the time to grow acclimated to this new approach.

A Shared Responsibility for Impact

If innovative learning models are designed to meaningfully shape students' experience in school, then model providers must also share in the responsibility for outcomes in the schools in which they operate.

Imposing an accountability system on third-party organizations who are not school operators would be new. Providers of discrete solutions that schools typically purchase from third-party organizations (i.e., textbooks, software products) are often not held accountable for outcomes in the schools they serve.

But in the context of a student-centered paradigm, it is both appropriate and necessary to incorporate mechanisms for accountability on model providers. The deep partnership they must forge with partner schools, combined with their comprehensive set of tools, resources, and services designed to meaningfully shape students' experiences, makes the model provider more than a vendor of instructional materials of training—they are true partners in the delivery of a mutually agreed-upon set of desired outcomes.



It is important for any evaluation of the implementation of an innovative learning model to align with the intention of the model itself. For example, applying measurements associated with the industrial paradigm (i.e., shifts in annual proficiency levels on grade-level assessments) to models oriented around a new paradigm (i.e., a model that enables competency-based learning) can create both instructional misalignment and a misreading of the impact the model may have. But if, for example, a model can enable a school to implement a competency-based approach to instruction, then accountability can be based on the learning growth demonstrated by participating students.

It is also important for model providers to articulate what is required of partner schools in order to support a successful implementation. Innovative learning models can only be as successful as the quality of implementation—clarity on schools' fidelity obligations can help to ensure that accountability mechanisms are applied fairly and that the impact of innovative learning models can be measured more accurately.

Infusing Innovative Learning Models into the K-12 Ecosystem



More must be done to leverage the full potential of model providing and its ability to support a systemic transition to a student-centered paradigm. This requires addressing the significant barriers to their development and adoption, as well as an intentional and coordinated effort to support their growth.

Understanding the Barriers to Innovative Model Providing

Despite proof points of the potential for innovative model providing, widespread adoption has been more measured. Some constraints are on the “supply” side of innovative model providing—that is, too few innovative model providers exist. Some constraints are on the “demand” side, with too few district and school leaders willing and able to adopt an innovative learning model. And some constraints are a reflection of a K-12 landscape that has continued to reinforce the industrial paradigm.

Supply Barriers

Because the K-12 ecosystem has almost exclusively focused on optimizing the industrial paradigm for more than a century, there is a profound lack of organizational capacity aimed at the development of new learning models. This includes:

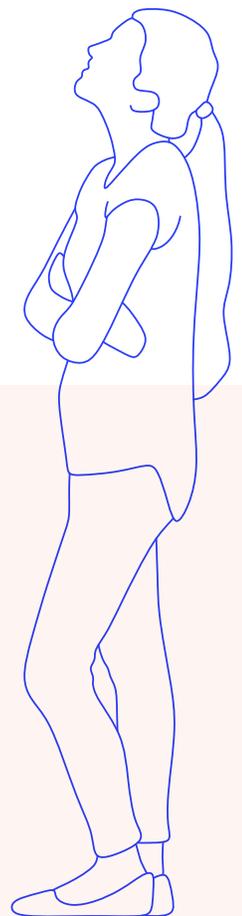
- high barriers and low entry incentives for becoming model providers
- the dearth of investment in education research and development
- the lack of capacity required to support widespread distribution and support

High barriers and low entry incentives for becoming model providers

Because the K-12 ecosystem has oriented around the industrial paradigm for more than a century, the ecosystem of providers developing innovative learning models that fall outside of this paradigm is extremely limited.

The two most prominent third-party actors, schools of education and publishers, are largely focused on meeting the labor demand and material needs of industrial-paradigm schools. While there is undoubtedly talent within those entities that could be aimed at the development of new

There is a profound lack of organizational capacity aimed at the development of new learning models.



learning models, the institutions themselves are largely focused on fulfilling the near-term demands of schools operating within the industrial paradigm.

Social entrepreneurs focused on innovative learning models must overcome several key barriers to entry, including the need to raise philanthropic capital to support research and development, outreach, and general operations. Many K-12 social entrepreneurs have gravitated to the charter sector, which has spent the last two decades building out a vast and supportive ecosystem.

Private-sector actors (whether existing companies or start-ups) also face formidable economic obstacles. The combination of a high up-front cost to develop a new learning model and the potential for a slow pace of adoption can make it difficult to rationalize investment. It is simply more economically viable to build solutions for the market as it is, as opposed to taking the risks associated with the development of breakthrough solutions.

The dearth of investment in education research and development

Reliable funding mechanisms to support the research and development are essential for transitioning away from the industrial paradigm. However, unlike in other sectors of our economy, a robust ecosystem of public and private investment focused on breakthrough innovation is practically nonexistent.

Innovation in healthcare is fueled by investments made by pharmaceutical suppliers, device

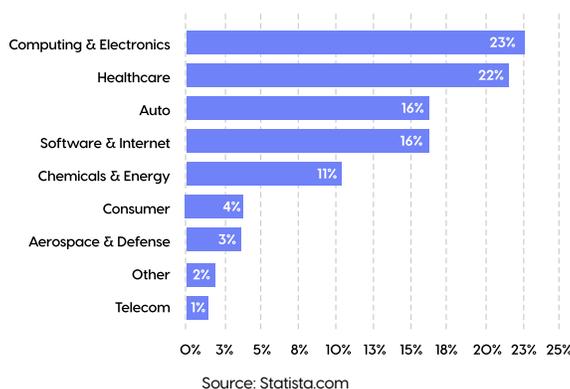
manufacturers, universities, venture capitalists, among others, as well as early-stage investments supported by the National Institute of Health. The same is true in the defense sector, as the combination of governmental agencies, defense contractors, and the Defense Advanced Research Project Agenda (DARPA) conduct research and development on new forms of weaponry. The energy sector leverages billions in private capital and public investment in order to drive the transformation toward renewables.

Few such analogs exist in K-12. Private sector investment in K-12 is focused on investments that have a clear path to profitability. That generally includes a) products and services that can be readily adopted within the existing industrial paradigm and do not require much change, or b) solutions that fall fully outside the system altogether and serve families directly.³⁰

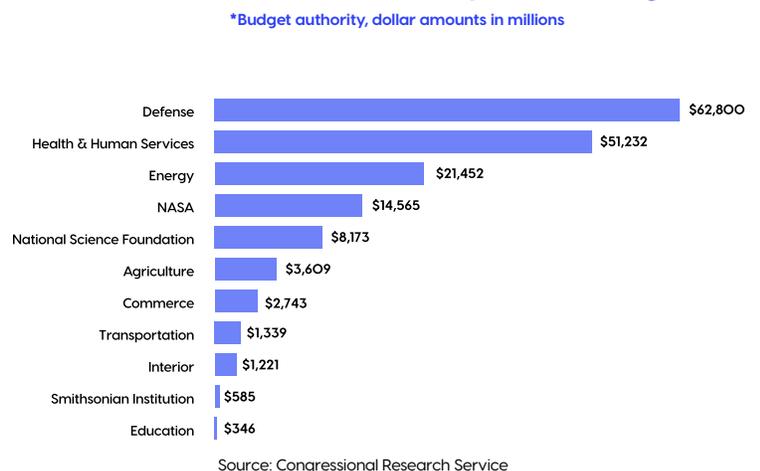
Public sector investment is not much better. In 2001, the federal government authorized \$264 million on education research and development—dead last among all federal agencies.³¹ It was even lower in 2020 (and still dead last).³² Since the vast majority of the research and development dollars have gone toward research (not development), only about \$50 million in 2020 was actually aimed at building things schools could actually use.³³ (By comparison, Snap Inc., the makers of Snapchat, spent \$1.1 billion on research and development, exploring new ways for teens to send digital photos to one another.)³⁴

There was an effort to jump-start education innovation in the Obama administration through the

Percent of Global Research & Development Spending in 2018, by Industry



Federal Research & Development Funding



Investing in Innovation (i3) program, a part of the American Recovery and Reinvestment Act. The program provided \$1.4 billion in funding over six years to innovative programs at various stages of development.³⁵ However, the vast majority of dollars went to scale programs with existing track records of success within the industrial paradigm—hardly a recipe for breakthrough ideas to emerge.³⁶ In the end, only 9 of 67 i3 program evaluations revealed high program fidelity and produced positive academic impact.³⁷ This may tell us all we need to know about the limits of what the current classroom model can deliver.

A more recent effort to support education research and development, Advanced Education Research and Development Fund (AERDF), provided a much-needed philanthropic jolt for education research and development. AERDF's goal is to convert research into capabilities—practices, methods, prototypes, tools—that can be built on to create breakthroughs. For many of these innovations, scaling their impact will nonetheless require their incorporation into new learning models that can be readily adopted within partner schools looking to embrace a student-centered paradigm.

Lack of capacity required to support widespread distribution and support

Beyond research and development, model providers face a formidable challenge in enabling the scale of new learning models once they are ready for widespread adoption.

First, the K-12 market is highly fragmented—there are nearly 14,000 school districts and 100,000 public schools in the US.³⁸ Achieving scalable impact requires capacity to communicate the availability and benefits of a new learning model with them, as well as the capacity to engage in direct conversations with potential partners. While some K-12 publishers have robust sales forces to support adoption of textbooks across the sector, it is rare for model providers to have anything close to these kinds of capabilities.

Second, widespread adoption will also mean instituting scalable support structures so participating teachers have the professional development required for their success. Supports can include academic coaching, operational support, leadership training, and the use of technological tools. The amount of training required will vary depending on the complexity of the model and how much change is required. But under any theory, model providers need field capacity to support successful implementations.

A Modern-Day New American Schools

New American Schools (NAS) emerged in the 1990s to support the creation and proliferation of innovative and adoptable whole-school designs.³⁹ NAS ultimately received over 600 proposals and funded eleven, seven of which reached the final scale-up phase.⁴⁰ NAS also provided grants to states and districts to support the early adoption of these new models.⁴¹ By 2002, NAS-funded designs had spread to more than 4,000 schools across the country.⁴²

A 2001 study of NAS by RAND found positive, though modest, impact on summative assessments, results and fidelity varied by school, by model, and by the number of implementation years.⁴³ Enthusiasm for the program ultimately waned, though updated versions of some models created as part of NAS are still in use today (e.g., Success for All, Expeditionary Learning).

Despite the challenges, the NAS approach demonstrated that design teams could create fully functioning, whole-school reform models based on innovative strategies that could be adopted on a large scale and that early-adopting school partners could be found. However, the overall impact of NAS was thwarted by many of the same systemic barriers that continue to block progress today.

While the overall impact of NAS was uneven, it is important to note that the models it spawned were designed prior to the emergence of the internet, cloud computing, and other technological advances that drove the modernization of most other sectors over the last twenty years. Today's model designers would have so much more to work with than those of the 1990s. Thoughtfully integrating these capabilities into learning designs, developing deep partnership with adopting communities, and addressing entrenched systemic barriers that maintain the industrial paradigm will be required for a new version of NAS to succeed.

Overcoming supply barriers

The profound barriers to the supply of innovative learning models can be overcome through comprehensive efforts aimed at lowering the barriers to entry for model providers and increasing the funding available for research and development, outreach, and support services. This will require both patient capital and a supportive ecosystem into which new model providers can be recruited.

Demand Barriers

A new and robust ecosystem to support the supply of new learning models will be insufficient to support the transition away from the industrial paradigm if it is not complemented by efforts to overcome the barriers to their demand. These include:

- systemic inertia rooted in stakeholder mindsets and power dynamics
- conditions that are insufficient to overcome systemic inertia
- school operators lack an awareness or understanding of model providing
- incongruous cost structures



Systemic inertia rooted in stakeholder mindsets and power dynamics

It is not easy for school and district leaders to fundamentally change their ways and shift to a student-centered paradigm. The change required to disrupt “business as usual” can readily be viewed by administrators and educators as either overwhelmingly laborious or inherently risky.

Many senior school administrators have themselves been successful educators within the industrial paradigm. There is simply more confidence and more comfort in returning to what is most familiar. And even when senior administrators are fully aligned, it is not unusual for others within a district or school who may not be supportive of this shift to thwart progress. While pockets of resistance may be expressed on principle, they may more likely reflect internal power dynamics.

At the same time, teachers may also be reluctant to give up the creative autonomy they have in the industrial-paradigm classroom in order to implement a learning model they did not create. Many created lesson plans they have used for years; adopting a new learning model can feel like going back to square one.

Lastly, parents may also struggle to adjust to a student-centered paradigm, especially if they expect a schooling experience for their child to be analogous with the one they once had.

Conditions that are insufficient to overcome systemic inertia

Despite these barriers, there are forceful advocates in many school communities (e.g., district leaders, board members, administrators) who champion a transition away from the industrial paradigm. They see promise in adopting a student-centered paradigm and are willing to lead the change required to bring it about. However,

these leaders often operate in conditions that are simply not ripe to overcome the forces of inertia that maintain the industrial paradigm.

For example, the diverse stakeholders who make up school communities are often pulling in different directions as they navigate competing priorities and demands. Even when they have a strong conviction that something needs to change, they are not always clear on what should replace the broken designs of today. Further, their systems often lack the human capacity and necessary culture needed to pursue and implement new models and perform the significant change management involved.

School operators lack an awareness or understanding of model providing

Most school operators lack awareness of the existence of innovative learning models, their track record, and the requirements to support implementation. Most are continuing to purchase materials aligned to the industrial paradigm because they are unaware of any viable alternatives to it.

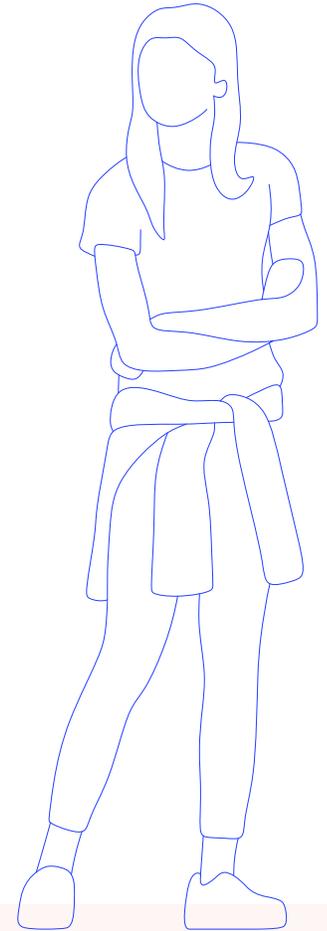
Part of this information gap relates to supply barriers—model providers with limited capital for research and development may have even less for communications and outreach. They must nonetheless compete for the attention of district administrators whose inboxes are often flooded with marketing for products built for the industrial paradigm.

Incongruous cost structures

New learning models can reflect a combination of materials and support services that are different from how school operators typically budget.

While state and local practices vary, most school operators are accustomed to purchasing a textbook for each grade level and subject area every five or so years. Those initial adoptions are often accompanied by one-time training for participating teachers. Supplemental materials such as workbooks or software products are typically purchased annually.

The costs of new learning models can readily fall outside of these parameters. There may be no need for a grade-level textbook or for supplemental materials since both may be embedded into the model itself. However, depending on the level of change required, the need for support services and teacher development may be more extensive than one-time training costs typically associated with the adoption of new materials.



Even when they have a strong conviction that something needs to change, they are not always clear on what should replace the broken designs of today.

Overcoming demand barriers

It is unlikely innovative learning models will systematically emerge without a concerted effort aimed at stoking their demand and overcoming the forces of inertia that maintain the industrial paradigm. Transcend's work with communities across the country has uncovered five key and measurable conditions for schools and systems pursuing innovation:⁴⁴

- clarity of vision
- conviction about the importance of student-centered learning
- capacity to implement the new model well
- culture of innovation
- coalition of multiple stakeholders, including educators and families, supporting the work

These conditions can be cultivated through an intentional, community-engaged process. The process can be accomplished in several ways, including building public will and conviction for embracing a student-centered paradigm, developing organizational capacity to operationalize the successful adoption of innovative learning models, and looking for creative solutions to address or challenge perceived barriers.

In addition to addressing these underlying conditions, demand barriers can be mitigated by structures that provide the organization regulatory and political cover for forward-leaning school communities to embrace a student-centered paradigm, and by financial incentives that can help school communities to de-risk the cost of early adoption.

Landscape Barriers

Overcoming the limits of the industrial paradigm will not only require overcoming the barriers to both their supply and demand, but it will also require a shift in the broader K-12 landscape in order for supply and demand to come together.

Systemic inertia: Policies and practices

Human inertia is often reinforced through the accumulation of dozens of regulations, processes, and systems that are all oriented around the industrial paradigm. Policies that have accumulated over decades have largely focused on optimizing the impact of the industrial paradigm. As a result, they have created substantial barriers to the adoption and proliferation of innovative learning models that challenge many of its core elements.

For example, federal and state policies that base educator accountability on the results of annual grade-level assessments can have an especially stifling effect on the adoption of innovative learning models. The policies have helped to shine a light on systemic inequities and have helped to influence adult decision-making around learning outcomes. However, the fact that state summative assessments focus on a narrow set of cognitive skills aligned to students' enrolled grade level can make it hard for schools to consider adopting new approaches oriented around a student-centered paradigm.⁴⁵



Similar barriers can be found in state and local policies surrounding the adoption of instructional materials. Many states and districts have extensive regulations and processes centered on the procurement of textbooks and related instructional materials, many of which are organized around limiting graft and purchasing high-quality textbooks and materials.⁴⁶ Importantly, these processes are also often centered on the degree to which materials are aligned to annual grade-level standards, a fixed design element of the industrial paradigm.⁴⁷ As a result, innovative learning models that prioritize a broader set of cognitive and non-cognitive outcomes, or are designed to meet students' individual needs in service of their long-term acceleration, can often be viewed as incompatible with these policies.

Lastly, district or network practices centered on optimizing impact within the industrial paradigm can also make it harder for new models to emerge. For example, interim assessments, student grading policies, teacher observation rubrics, and other systems can all pressure innovative learning models to adopt industrial paradigm features.

Lack of a place where supply and demand can meet

Model providers who are looking to expand their impact generally do not have a place where they can find school operators looking to support a student-centered paradigm. Many of the successful partnerships forged between school operators and model providers have largely emerged by happenstance.

The lack of a robust marketplace, where the supply and demand for innovative learning models can connect, further challenges the economics of model providing, reduces investment, and constricts supply.

Overcoming these barriers will require seeding robust marketplaces where school operators and model providers can more easily find one another, contract for pilots and ongoing support, and make decisions based on transparent data about models and their efficacy.

Recommendations

The challenge of modernizing our K-12 system of schooling by transitioning from the industrial paradigm can seem daunting. Despite calls for change, the ways in which schools have operated for more than a century are deeply ingrained in the minds of educators, families, and policymakers. Seemingly every element of schooling—from facilities to bell schedules to class grades to instructional materials to teacher preparation—are all centered on the industrial paradigm and reinforced through federal and state policies.

Daunting as it may be, though, these challenges must be overcome. They are no less formidable than the paradigm shift happening in the energy sector toward the use of renewables, or the paradigm shift in the defense sector that is now centered on cyberwarfare.



Accomplishing this bold objective will require a sustained and integrated effort on the part of federal and state policymakers, philanthropists, and school operators whose collective work can enable a student-centered paradigm of schooling to ultimately emerge. Below are key recommendations for how each of these groups can address the supply, demand, and marketplace barriers that stand in the way of this essential transition.

Recommendations for Federal Policymakers

Invest in the early stages of development of innovative learning models and in the organizational capacity of model providers. (Supply)

The supply of innovative learning models can best be addressed through a concerted effort to fund their development and distribution capacity. The private sector has largely been unwilling to accept the financial risks associated with this required investment, while philanthropic funding is limited, difficult to sustain throughout a model development cycle, and generally oriented around industrial-paradigm solutions that can be scaled.

A \$1.3 billion annual investment in education research and development over 10 years would support the development, scale, and evaluation of 150 impactful and scalable innovative learning models—ten model providers across each of four core domains (reading, math, science, social studies, and schoolwide), five model providers across each of two supplemental domains (health and well-being, and interdisciplinary), and across three grade spans (elementary, middle, and high). (See page 63 for more detail on how this funding could be deployed).

Fund the early adopters of innovative learning models. (Demand)

Efforts to support the supply of innovative learning models must be complemented with those to overcome the barriers to their adoption. In much the same way government-funded supply-side and demand-side incentives helped to spur the clean energy sector, the same formula is required to shift the K-12 sector toward a student-centered paradigm.

One way to do so would be to allow states to apply for federal funding to offset the cost of implementation at early-adopter schools. State entities that receive federal funding could then host a subgrant competition in which schools could access funding to support adoption-related costs of innovative learning models over a fixed period of time. Funding could also be used by state agencies to fund the administrative costs associated with overseeing, supporting, promoting, and evaluating the impact of innovative learning models.

Accomplishing this bold objective will require a sustained and integrated effort on the part of federal and state policymakers, philanthropists, and school operators.





Schools looking to embrace a student-centered paradigm will need the regulatory permission to operate under an alternate accountability structure that maintains the overall objective of college and career readiness.

Create alternative approaches to assessment and accountability that would allow for innovative learning models to emerge. (Landscape)

Federal education policies aimed at optimizing impact within the industrial paradigm have also made it more difficult for innovative learning models oriented around a student-centered paradigm to emerge. Among the most constraining policies are those embedded within the Elementary and Secondary Education Act (ESEA), which require states to institute accountability systems centered on grade-level assessments—an approach that incentivizes classroom instruction to focus their teaching on grade-level material regardless of individual student need. Schools looking to embrace a student-centered paradigm will need the regulatory permission to operate under an alternate accountability structure that maintains the overall objective of college- and career-readiness, allows for more personalized academic pathways, and provides a more precise way of measuring and rewarding learning growth toward proficiency.

Recommendations for State Policymakers

Invest in the development of innovative learning models and in the organizational capacity of model providers. (Supply)

Some states will want to consider making investments in the research and development required to develop innovative learning models. The New

York State Education Department's investment in EngageNY, while not an innovative learning model, is a good example of how state-led research and development efforts can both impact students within a state and can scale across state lines.⁴⁸

States have not historically invested in research and development and many may not believe they have adequate internal capacity to support a high-quality research and development process. At the same time, state-level investments in research and development can help harness the educational, technological, and creative capacities within states so the innovative learning models it oversees are more closely aligned to state standards.

Launch statewide efforts such as Innovation Zones to further accelerate the adoption of innovative learning models within a defined regulatory structure. (Demand)

Innovation Zones have historically been used by some states as a mechanism for providing varying levels of school or district autonomy.⁴⁹ However, the instructional innovations that have emerged have been far more limited and have generally not enabled schools to transcend the limits of the industrial paradigm. Further, decades of systems, policies, and mindsets oriented around the industrial paradigm can make it seem risky to innovate beyond its limitations. The inertia to do what's always been done can be strong and requires a permission and incentive structure to overcome.

State leaders looking to infuse deeper levels of instructional innovation into their statewide landscape may consider adopting Innovation Zones that are explicitly organized to support the adoption and proliferation of innovative learning models.

These types of Innovation Zones could involve any or all of the following:

- the identification of schools or districts who voluntarily choose to participate
- the identification of qualified providers of innovative learning models, as selected through a rigorous evaluation process
- technical assistance provided to participating school communities that can help them articulate a schoolwide vision, select the model providers most aligned to that vision, and support a successful adoption process
- policy flexibility where required to support implementation fidelity
- funding to participating schools and districts to support model adoption and ongoing evaluation of participating schools and qualified providers, including accountabilities for each

Innovation Zones have historically been more focused on government autonomy than on building the genuine capacity for innovation.



Three states—North Dakota, Nebraska, and Montana—included this form of Innovation Zones in their federally approved American Rescue Plans. See page 57 for a description of how Innovation Zones generally work.

Create opportunities for school operators to explore, engage, and partner with model providers. (Landscape)

State leaders looking to facilitate the transition to a student-centered paradigm can help to educate local leaders about the value of innovative learning models. While model providers themselves must also play a key role in reaching out and communicating with potential partner schools, the highly fragmented nature of the K-12 sector (nearly 14,000 school districts) requires states play a key role in amplifying what is now possible and supporting school operators in the exploration and adoption process.

Some ways states can support the development of a robust landscape for model providing include:

- publicly speaking and writing about the need to transition to a student-centered paradigm
- ensuring key administrators are dedicated to fostering the supply and demand of innovative learning models within the state
- integrating innovative learning models into broader statewide efforts in areas such as school improvement, Career and Technical Education, and supports for English learners and students with disabilities
- holding events where model providers and school operators can come together
- promoting the Models Exchange in the context of aggregating curricular and open educational resources for schools
- conducting RFPs and negotiating master services agreements with model providers that can then be leveraged by

local education agencies

- providing technical assistance to local education agencies looking to adopt and implement innovative learning models

Create regulatory space within state policy for innovative learning models to emerge. (Landscape)

States' K-12 regulatory landscapes are largely oriented around the implementation and optimization of the industrial paradigm. They can include rules on topics such as class size, graduation requirements, teacher certification, textbook procurement, budget structures, course requirements, assessment, and accountability.

While some of these regulations may not impede the adoption of innovative learning models, others may be more problematic. For example, states that require or promote the adoption of classroom-based curricular materials aligned to annual grade-level standards can readily be at odds with models that provide students with personalized academic pathways to proficiency. Similarly, graduation requirements that mandate students successfully complete yearlong courses can prevent students from accessing models that allow them to focus on key concepts they missed, as opposed to having to retake a full, yearlong class.

While many schools will likely want to continue operating within the industrial paradigm, state leaders must carefully examine their regulatory landscape so school communities looking to transition to a student-centered paradigm have the permission and opportunity to do so.

Develop and pilot competency-based assessment and accountability. (Demand)

For some subjects and grade spans, adopting a competency-based assessment system and accountability system is a vital step to transitioning to a student-centered paradigm. Done well, competency-based assessment and accountability can align the instructional incentives embedded within statewide assessment and accountability systems to a student-centered paradigm. They can also provide parents, students, and teachers with more precise and transparent information on the progress each student makes toward proficiency than current state assessments afford.

Initially, states would likely need to operate a competency-based assessment system as a supplement to current, state-summative assessments given the requirements of federal law. However, as federal policy evolves, states may one day be able to give schools a choice about whether to implement a grade-level-based or competency-based assessment and accountability system. As competency-based assessments evolve, model providers may ultimately be able to validly and reliably embed them directly into the models themselves, eliminating the need for end-of-year tests all together.

Recommendations for School Operators

Consider launching a model design team. (Supply)

Some school operators—or members of their teams—may also consider leading or participating in the design of an innovative learning model. Many have deep levels of expertise and creativity that can form the basis for designs that support many of the Ten Leaps.

School operators looking to lead the development of innovative learning models should consider how their internal expertise can best be complemented with those outside of their organizations, how to protect design teams from operating in day-to-day challenges schools currently face for an extended period of time, and how their models can ultimately scale to serve students outside of their community.

School operators looking to support the design of innovative learning models, but not necessarily lead the process of doing so, may actively look to partner with early-stage model providers to support their initial iterations.

Engage school communities around the development of a shared vision for the future. (Demand)

School operators who believe in the necessity of shifting away from the industrial paradigm can begin by undertaking a community-engaged process of building a broad-based coalition of key stakeholders—community leaders, administrators, teachers, families, and students—who can unite around a common vision for schooling that is oriented around a student-centered paradigm. Districts such as the Cleveland Municipal School District used the disruption caused by the pandemic as a moment to reset their approach to education by engaging with their community around a bold new vision for its schools that is far more oriented around a student-centered paradigm.⁵⁰





Align internal structures, policies, and stakeholders to support model adoption. (Demand)

Many internal systems and structures within school districts reinforce the industrial paradigm of schooling. So too can the experiences and biases of school board members and administrators, whose successes operating within the industrial paradigm served as a catalyst for their future career opportunities.

That is why school operators looking to embrace innovative learning models must carefully examine their internal operations so both participating schools and model providers are set up for success. That can include setting up new internal reporting mechanisms, reviewing policies and practices that may conflict with a student-centered paradigm, and communicating clearly with key internal stakeholders on their role in supporting the success of this transition.

Explore adopting innovative learning models as a primary or supplemental curricular offering. (Demand)

Districts and schools looking to transition to a student-centered paradigm can explore partnering with the current community of model providers to implement innovative learning models. A brief description of providers, some of the leaps they support, and their contact information can be found

on Transcend's Innovative Models Exchange at exchange.transcendededucation.org. A template for shaping an RFP focused on innovative learning models can be found on page 58.

Encourage states to revise procurement policies, examine regulations, and create permission structures for innovative learning models to emerge. (Demand)

School operators focused on transitioning to a student-centered paradigm for learning may find they are blocked by a set of state policies, rules, and regulations rooted in the industrial paradigm. Oftentimes, state officials may not even realize how constraining some of these regulatory approaches can be. It is incumbent upon school operators to help educate state policymakers on why changes to the regulatory landscape are essential for modernization.

Recommendations for Philanthropy

Invest in the identification, organizational capacity, and success of model providers. (Supply)

Philanthropy provides the most viable pathway for funding the design of innovative learning models. Market forces are ill-equipped to address this gap in the near term, and public investment in education research and development is limited and focused largely on industrial-paradigm studies and solutions.

K-12 philanthropists interested in supporting a systemic transition to a student-centered paradigm can consider investing in:

- exploratory efforts by new or existing K-12 organizations aimed at becoming a model provider
- early-, middle, or later-stage research and development efforts on the part of model providers
- communications and outreach capacity of model providers so they can grow their impact with new school partnerships
- innovators who have historically been undercapitalized and who have proximity to the communities that their models are built to support.

Invest in the initial demand for innovative learning models in local or national contexts. (Demand)

Philanthropy can provide the much needed “risk capital” for schools to undertake community-based design journeys and consider piloting an innovative learning model. Investments aimed at the demand side of the model provider sector may focus on technical assistance to states, districts, and schools looking to evolve into a student-centered paradigm, as well as support for individual schools and districts looking to adopt innovative learning models.

Invest in the ecosystem for model providing, including advocacy for enabling federal and state policies. (Landscape)

In order for a vibrant ecosystem of model providing to take root, a broad-based supporting ecosystem must begin to emerge. This would include organizations that:

- advocate for federal and state policies that eliminate barriers to model providing and catalyze their growth
- recruit organizations to become model providers
- support model providers in their development and iteration of innovative learning models
- provide technical assistance for states, districts, and individual schools looking to adopt innovative learning models
- communicate with key stakeholders, including policymakers, philanthropists, education leaders, teachers, parents, and sector influencers about the model provider sector
- evaluate the impact of innovative learning models at various stages of development
- sector-building efforts where model providers can learn from one another

Recommendations for Education Advocates

Champion policies that promote the development of innovative learning models. (Supply)

Transitioning to a student-centered paradigm will require a coalition of education advocates who recognize the promise of innovative learning models and the need to invest and promote their success. While the work of many existing K-12 advocates may be focused on a specific issue or cause (e.g., special education, workforce development, gifted and talented education), it may well be that innovative learning models provide a new, viable pathway to achieving organizational objectives.



Encourage local school operators to explore innovative learning models and consider their adoption. (Demand)

State and local education advocates can help to inform school operators about the existence of innovative learning models and opportunity to transition to a student-centered paradigm. In some cases, advocates may also be able to provide additional capacity for school operators to help them to both shape a schoolwide vision oriented around a student-centered paradigm and explore model providers for whose models might align to that vision.

Advocate for policies that shift the federal, state, and local landscape in support of innovative learning models. (Landscape)

K-12 education will be unable to effectuate a transition from the industrial paradigm to a student-centered paradigm without a coalition of advocates who can help to champion the required shifts in policy. Some of these shifts, including those related to federal assessment and accountability policy, create complex tensions that must be resolved. Others such as federal investment in research and development or the creation of state-based Innovation Zones may be more ripe in the near term for a coalition of advocates to find common ground.

Recommendations for K-12 Solution Providers

Examine existing solutions and consider what would be needed for them to become innovative learning models. (Supply)

The marketplace for today's K-12 solutions includes tools and materials designed to operate within the industrial paradigm. However, many of these solutions can likely be converted into innovative learning models with new investments in both product development and school support. This is especially true for technology-based solutions that have the capability of meeting students' unique needs but are generally used to support whole-class instruction.

As school operators begin exploring the adoption of innovative learning models, existing K-12 providers may wish to explore what adjustments may be required so they are competitive.

Consider launching new organizations focused on model providing. (Supply)

Education-minded entrepreneurs may want to launch new entities focused on developing innovative learning models from their inception. New entities have the benefit of designing new learning models in ways that are less constrained by the legacies of existing solutions and organizational norms. Universities, charter management organizations, and other related K-12 entities may also wish to leverage their experience and expertise in order to launch new entities focused on innovative learning model development.

The marketplace for today's K-12 solutions includes tools and materials designed to operate within the industrial paradigm. However, many of these solutions can likely be converted into innovative learning models.



Barriers & Recommendations

Barriers

Recommendations

Supply

High entry barriers and low entry incentives for becoming model providers

The dearth of investment in education research and development

Lack of capacity required to support widespread distribution and support

School Operators:

Launch a model design team.

Federal Policymakers:

Invest in the development of innovative learning models and in the organizational capacity of model providers.

State Policymakers:

Invest in the development of innovative learning models and in the organizational capacity of model providers.

Philanthropy:

Invest in the identification, organizational capacity, and success of model providers.

Education Advocates:

Advocate for policies that support the incubation and support of model providers.

Potential Model Providers:

Existing Organizations:

Examine existing solutions and consider what would be needed for them to become innovative learning models.

Entrepreneurs:

Consider launching a new organization focused on model providing.

Demand

Systemic inertia rooted in stakeholder mindsets

Conditions that are insufficient to overcome systemic inertia

School operators lack an awareness or understanding of model providing

Incongruous cost structures

School Operators:

Engage school communities around the development of a shared vision for the future.

Ensure internal structures, policies, and stakeholders are aligned in support of model adoption.

Explore and budget for the adoption of innovative learning models as a primary or supplemental curricular offering.

Federal Policymakers:

Fund the early adoption of innovative learning models.

State Policymakers:

Launch statewide efforts such as Innovation Zones to further accelerate the adoption of innovative learning models within a defined regulatory structure.

Philanthropy:

Invest in the initial demand for innovative learning models in local or national contexts.

Education Advocates:

Encourage local school operators to explore innovative learning models and consider their adoption.

Landscape

Systemic inertia rooted in policies and practices

Lack of a place where supply and demand can meet

School Operators:

Encourage states to revise procurement policies, examine regulations, and create permission structures for innovative learning models to emerge.

Federal Policymakers:

Create regulatory space within federal policy for innovative learning models to emerge.

State Policymakers:

Create opportunities for school operators to explore, engage, and partner with model providers.

Create regulatory space within state policy for innovative learning models to emerge.

Philanthropy:

Invest in the ecosystem required for model providing to succeed, including the advocacy for enabling federal and state policies.

Education Advocates:

Advocate for policies that shift the state and local landscape in support of innovative learning models.

Conclusion



The industrial paradigm of schooling is inherently incapable of providing each student with the kind of education they need to thrive in the twenty-first century and contribute to the world around them. For decades, its fixed design elements—age-graded, whole-class, teacher-directed instruction—muted the impact of well-intentioned improvement efforts and resulted in a student experience that leaves the vast majority of US students unprepared to succeed in the world.

It is time to break free from this box and replace it with a student-centered paradigm that better addresses our nation's systemic needs, and is more reflective of its true capabilities. We believe the evolution of innovative learning models and the model provider sector provides the most viable approach to achieving that objective because it allows for the student experience to no longer be constrained by what an individual classroom teacher can plan and execute for a group of same-aged students.

It is hard to see how our system of schooling will modernize without the emergence of a new sector dedicated to that explicit purpose. The work of nearly all of the actors operating in the K-12 space—from school operators to publishers to universities to third-party support organizations—is oriented around optimizing within the industrial paradigm. Decades of laws, regulations, and systemic processes have further ossified the industrial paradigm and made it hard to consider better ways of providing a high-quality education to our nation's fifty million students.

Innovative learning models provide a pathway to true systemic modernization. Untethered from the legacies of the industrial era, innovative learning models can be thoughtfully designed in ways that leverage research, know-how, and modern technologies in order to provide students with a learning experience that is more reflective of the Ten Leaps.

A movement centered on the adoption of innovative learning models can also be more politically sustainable than school reform efforts that have characterized the last two decades, especially if their designs are grounded in addressing the explicit needs of families, teachers, and students. While the inertia to maintain the industrial paradigm is strong, it is hard to identify specific political constituencies that would actively fight against modernization, especially in light of the pandemic and profound labor shortages. The fact that innovative learning models can be adopted in urban, suburban, and rural contexts further strengthens both their political viability as well as the potential for widespread impact.

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Some critics of this approach will argue that in many schools, teachers lack the capacity to effectively implement an innovative learning model. These new approaches to schooling still very much require the talents, skills, and knowledge of educators to succeed. They are not “teacher-proof.” However, thoughtfully designed models can be designed in ways that make the job of the teacher more sustainable, particularly in cases where technology can play a role in filling some of their current functions (e.g., grading, parent communications, data analysis, and planning). Moreover, simply waiting for the moment when teachers have the capacity to succeed within a student-centered paradigm will mean a perpetual commitment to the industrial paradigm, especially in schools where teacher turnover is particularly high.

Others will argue that the introduction of new learning models oriented around a different operating paradigm can undermine mechanisms established over the last two decades to instill school and teacher accountability. We disagree. The objective of a student-centered paradigm is for far more students to graduate high school ready for college or a career by providing multiple pathways for them to get there. Innovative learning models can be designed in ways that provide greater transparency and precision to this process, while also introducing a new actor—the providers themselves—who will share in the accountability for student outcomes. Their emergence does not require a wholesale gutting of the current assessment and accountability system, but does require the explicit space for new models to properly emerge.

There are undoubtedly risks associated with pursuing the model provider approach. The capacity for creating new learning models may be too limited, the appetite among school communities for adopting new models may be too restricted, the policies and mindsets that have cemented the industrial paradigm may be too strong to dislodge, or those providing the funding required to get to scalable impact may be too impatient. There are surely others.

But those risks must be examined against the risks of continuing to focus only on optimizing for impact within the industrial paradigm—an approach that, after more than a century, leaves nearly two-thirds of our nation’s youth unprepared for college or a career, places educators in a fundamentally unsustainable role, and does little to address our nation’s inequities.

We hope this report serves as a helpful blueprint for one way to move forward.



Who We Are



New Classrooms Innovation Partners developed *Teach to One 360*, an innovative learning model for middle and high school mathematics that allows students to progress along a customized educational pathway by integrating teacher-led, collaborative, and independent learning modalities. It also developed *Teach to One Roadmaps*, an all-digital tool that includes a precise diagnostic assessment, aggregated content from multiple providers, and personalized learning progressions.



Transcend is a national nonprofit that supports school communities to create and spread extraordinary, equitable learning environments. The organization was founded on a belief that we must reimagine schooling, using a community-driven approach, so all children can realize their infinite potential. Transcend pursues its mission by partnering directly with schools on design journeys while also sharing powerful models, tools and insights across the sector, with the goal of fueling significant leaps in education so all young people can thrive in and transform the world.

Innovation Zones for New Learning Models

A Way for States to Catalyze Innovation for Twenty-First-Century Learning

While Innovation Zones have historically oriented around regulatory relief, governance, or site-based autonomy, states such as North Dakota and Montana are leveraging their ESSER/ARP dollars to develop new kinds of Innovation Zones designed to bring the capacity required for shifting to a student-centered paradigm, beginning in fall 2023.

Their approach is based on the following structure:

1. States invite school operators (local education agencies and/or schools) to apply to be part of the state's Innovation Zone.
2. In parallel, states invite model providers to apply to work in the Innovation Zone and design an evaluation and selection process to determine qualified providers.
3. States provide technical assistance to participating schools in order to support the development of a schoolwide (or subject-specific) vision, the selection of model providers, and the long-term success of the partnership.
4. Participating schools, approved technical assistance providers, and approved model providers then mutually determine whether the model can be successfully implemented in the school.
5. Participating schools and a model provider contract with one another to support implementation, with explicit roles and responsibilities articulated for both parties.
6. Each year, the model provider and partner school submit interim data to the state regarding the overall implementation and relevant student performance data.
7. At the end of a fixed period of time (generally three to five years), model providers reapply to maintain their status as an approved model provider.

These types of Innovation Zones can be set up either by state legislation or by the administrative action of a state education agency. In doing so, state policymakers consider:

- Whether the Innovation Zone will focus on individual subjects and/or grade spans (e.g., Math Innovation Zones for middle grades) or multiple subjects and grade-spans
- The criteria for determining which schools and/or local education agencies will be permitted to participate
- How the state will modify, supplement, or waive applicable state policies and regulations for participating schools
- Whether participating schools will be able to access funding to support the adoption of state-approved learning models

Both states included Innovation Zones as a core focus of their ESSER/ARP commitments. Each plan calls for the use of new learning models, comprehensive measures of learning growth, and shared accountability for results. In both states, state agencies are building operational capacity at the state level to support implementation, engaging with key stakeholders across the state to garner support, and developing ongoing feedback loops. They are also coordinating with each other to support their initial endeavors and learn from one another.

Districts may also want to consider a more localized version of Innovation Zones for individual schools. In doing so, however, they may need to consider how best to build local capacity to support this transition, as well as how to mitigate the impact of any state or local policies that could impede successful implementations.

A Sample Guide to Developing RFPs for Innovative Learning Models: Mathematics

Innovative learning models provide an alternative way of thinking about how best to address current educational inequities and inadequacies. They stem from a core belief that the structures of school originated more than 100 years ago, with all same-aged students learning the same material at the same time. This structure makes it difficult for teachers to tailor learning to each student's unique strengths and needs.

Innovative models challenge these structures by providing schools with an integrated set of tools, systems, teacher supports designed to enable academic acceleration and social-emotional development. This form of instruction can be especially relevant for schools and districts looking for innovative ways to address learning loss as a result of COVID-19.

Innovative learning models differ from digital and non-digital curriculum products in that they can generally include multiple products (e.g., content, assessment, scheduling, reporting, and gradebooks) as well as extensive professional development and teacher support. Because many districts are unfamiliar with procuring innovative learning models, below are ten key considerations to take into account when crafting an RFP for a mathematics innovative learning model, along with sample questions to incorporate.

1. Model Components

Understanding what **is** and **is not** included in different innovative learning models can help districts to understand the various capabilities of each provider and to compare the value propositions embedded within each proposal.

Proposed Prompt for RFP

Please check the following components included in your innovative learning model:

- Instructional Content**
 - Modalities
 - Independent
 - Teacher-Led
 - Digital
 - Collaborative
 - Project-Based
 - Scope
 - Students can only access grade-level material
 - Students can access content from multiple grade levels

- **Instructional Assessments**
 - Diagnostic
 - Cumulative
 - Personalized
- **Academic reporting**
 - Administrative
 - Teacher
 - Parent
 - Student
- **Degree of Personalization**
 - Personalized academic targets based on student starting points
 - Personalized learning progressions
 - Ongoing program adaptivity to individual student needs
- **Student grouping and regrouping**
 - Frequency
 - Daily
 - Weekly
 - Monthly
 - Other
 - Level of automation
 - Tools for teachers to implement
 - Fully automated
- **Out of school acceleration**
 - Ability for students to accelerate outside of school hours
- **School Supports**
 - Program Onboarding
 - District training
 - School Leadership training
 - Upfront logistical support
 - Upfront professional development
 - Ongoing Logistical Support
 - Ongoing Professional Development
- **Social-Emotional Supports**
- **Other Key Features**
 - *If you have one or more videos that explain how your model works, please include a link.*

2. Grade-Level Focus

Some schools may choose only to look for providers in specific grade spans, while others will look for wider levels of coverage.

Proposed Questions for RFP

- *What grade spans does the model apply to?*
- *In what ways does the program differ for different age groups?*

3. Operational Requirements

Different models may have different requirements for staffing, scheduling/instructional minutes, learning space, student cohort sizes, and technology. Understanding these requirements can help to determine if the implementation is viable.

Proposed Questions for RFP

- *What are the requirements for staffing, scheduling/instructional minutes, classroom space, student cohort sizes, technology, and any other area relating to school operations?*
- *Can the model be configured to support different operational realities?*

4. School Supports

Because innovative learning models challenge many of the key attributes of traditional classroom instruction, teachers will need logistical support and professional development, especially in the early stage of implementation. A well-crafted plan for teacher supports can accelerate the change management process and position a school to more readily achieve high levels of impact.

Proposed Questions for RFP

- *How does the model provider offer logistical support and professional development to teachers and administrators?*
- *Is this included in the fee?*
- *Do these costs vary over time?*

5. Assessment

Enabling a personalized approach to learning requires tools that can accurately assess where students are starting from, measure progress in real time, and provide reliable ways of measuring growth at key intervals.

Proposed Questions for RFP

- *How is each student's starting point initially diagnosed?*
- *How is their learning tracked over time?*
- *What mechanisms are in place to reliably measure whether students are growing throughout the school year?*

6. Learning Modalities

The use of multiple modalities is a key enabler of more personalized academic learning progressions since an individual teacher cannot provide instruction on multiple skills at the same time. In addition, multiple learning modalities that are effectively synchronized allows for a student to learn about the same concept in different ways, thus deepening their conceptual understanding. The use of multiple modalities can also better ensure that students are learning in ways that work best for them—some may excel with teacher-led instruction, others with more independent modalities, and still others with more collaborative experiences.

Proposed Questions for RFP

- *What learning modalities are standard in the model?*
- *To what degree do these learning modalities work in synchronicity?*

7. Degree of Personalization

Schools look to innovative learning models so that students are able to progress on their own individualized path to proficiency. The degree to which an innovative learning model can:

- 1) Help schools to determine the precise path each student should take
- 2) Provide a rich and viable way of operationalizing that path for each student is essential to accomplishing this vision

It is important for districts and schools to understand the precise ways in which different models personalize what, when, where, and how students learn.

Proposed Questions for RFP

- How does the model personalize what, when, where, and how students learn?
- How does data regarding students' historical learning patterns influence their future learning experiences?

8. Social-Emotional Development

Learning is inherently a social and emotional process. Innovative learning models that also integrate components designed to support students' social and emotional development can enable schools to better serve the whole child.

Proposed Question for RFP

- How does the model integrate social and emotional development into the overall design?

9. Use of Time

Some districts and schools may look to pilot an innovative learning model as a replacement to their core instructional program, while others may wish to implement in ways that supplement a core curriculum implementation by implementing a model in lieu of an elective, for example.

In addition, given the inherent limitations of instructional time within the school year, some innovative learning models may be able to effectively leverage out-of-school time in order to provide new opportunities for students to accelerate.

Proposed Questions for RFP

- *Can the offering be implemented in core and supplemental contexts?*
- *What are the differences in terms of how the program is implemented and in the associated operating requirements?*
- *How does the model leverage out-of-school time to support acceleration?*

10. Research and Impact

Innovative learning models are still very much in their infancy, but some providers may have research on overall effectiveness.

Proposed Questions for RFP

- *What research has your organization done into the effectiveness of the model?*
- *What are the key conditions that drive overall program impact and effectiveness?*

Summary

Innovative learning models provide a unique opportunity to reimagine the classroom experience so that teaching can be tailored to the unique strengths and needs of each student. Understanding the various strengths and limitations of model providers can help to ensure a thoughtful decision-making process and successful implementation.

A Financial Model to Scale the New Sector

10-Year Goal: 150 Innovative Learning Models Serving 25M Students Across 72K Schools

Funding the Supply of Innovative Learning Models (\$6.3B / 10 years)

- 10 Models in Each of 4 Core Domains / Grade Spans
- 5 Models in Each of 2 Supplemental Domains / Grade Spans

	Elementary	Middle	High	TOTAL
Reading	10	10	10	30
Math	10	10	10	30
Science	10	10	10	30
Social Studies	10	10	10	30
Health & Well-Being	5	5	5	15
Interdisciplinary	5	5	5	15
TOTAL	50	50	50	150

Phases of Three-Year Research & Development Grants

Phase 1: Incubation

Avg Annual Grant: \$4M

Avg Number of Schools Served by Year 3: 5

Phase 2: Iteration

Avg Annual Grant: \$5M

Avg Number of Schools Served by Year 3: 40

Phase 3: Scalability

Avg Annual Grant: \$4M

Avg Number of Schools Served by Year 3: 500

Total Funded Models: 211 (~30% of which will not succeed)

Funding the Early Demand for Innovative Learning Models (\$6.9B / 10 Years)

- One-time planning grants for adopting schools: \$30k (of which 75% will use)
- Five-year grants averaging \$25K annually grant to support model adoption
- Modest levels of annual attrition

10-Year Total

Supply	\$6.3B
Demand	\$6.9B
Total	\$13.2B
Annual Avg	\$1.3B

Endnotes



¹ National Center for Education Statistics. (May 2015). "Reading and mathematics score trends." Retrieved September 5, 2022, from <https://nces.ed.gov/programs/coe/indicator/cnj>

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³ Susan J. Bodilly. "New American Schools' Concept of Break the Mold Designs." RAND Corporation. 2001. Retrieved December 10, 2021, from https://www.rand.org/pubs/monograph_reports/MR1288.html

⁴ For purposes of this paper, we will use the terms optimizing and modernizing in this way, even though we recognize that modern approaches can be adopted to support improvements that remain within the industrial paradigm. Indeed, using technology to further optimize impact within the industrial paradigm has been the focus of most K-12 innovation efforts over the last two decades.

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⁹ U.S. Census. (July 16, 2020). "Census Bureau reports nationwide shipment of goods in 2017 reached 12.5 billion tons and \$14.5 trillion." Retrieved September 5, 2022, from <https://www.census.gov/newsroom/press-releases/2020/commodity-flow.html>

¹⁰ E. Dorn, B. Hancock, J. Sarakatsannis & E. Viruleg. (December 8, 2020). "COVID-19 and learning loss—disparities grow and students need help." McKinsey & Company. Retrieved August 17, 2022, from <https://www.mckinsey.com/industries/public-and-social-sector/our-insights/covid-19-and-learning-loss-disparities-grow-and-students-need-help>

¹¹ Ibid.

¹² Echelon Insights. (November 2021). "National Parents Union - November 2021 Survey." Retrieved December 10, 2021, from <https://nationalparentsunion.org/wp-content/uploads/2021/11/For-Release-NPU-Topline-November-2021.pdf>

¹³ Walton Family Foundation. (May 5, 2021). "National Poll Reveals Parents' Priorities for K-12 Education." Walton Family Foundation. Retrieved September 5, 2022, from <https://www.waltonfamilyfoundation.org/learning/national-poll-reveals-parents-priorities-for-k-12-education>

¹⁴ Ibid.

¹⁵ Public School Review. "Teacher Satisfaction at Its Lowest Point in Two Decades." Public School Review. Retrieved September 5, 2022, from <https://www.publicschoolreview.com/blog/teacher-satisfaction-at-its-lowest-point-in-two-decades>

¹⁶ Education Reimagined. (October 20, 2021). Retrieved December 7, 2021, from <https://education-reimagined.org/wp-content/uploads/2021/01/A-Transformational-Vision-for-Education-in-the-US.pdf>

¹⁷ Kate Gibson. (November 12, 2021). "Teacher Shortages — Made Worse by COVID-19 - Shutter Schools across U.S." CBS News. Retrieved September 5, 2022, from <https://www.cbsnews.com/news/teacher-shortages-covid-19-school-closings-classes-cancelled/>; Jessica Dickler. (March 1, 2021). "More Teachers Plan to Quit as Covid Stress Overwhelms Educators." CNBC. Retrieved September 5, 2022, from <https://www.cnbc.com/2021/03/01/more-teachers-plan-to-quit-as-covid-stress-overwhelms-educators.html>

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Position	<u>Year 0</u>	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>
Head of School/School Leader	1	1	1	1
Assistant Principal	0	0	0	1
Dean(s)	0	0	0	0
Additional School Leadership	0	0	0	0
Core Classroom Teachers	0	19	23	28
Specialized Classroom Teachers (e.g. special education, ELL, foreign language, etc.)	0	5	7	7
Student Support Positions (e.g. counselor, nurse, social workers, psychologists, etc.)	0	2	2	2
Specialized School Staff	0	0	0	0
Teaching Aides or Assistants	0	18	19	19
School Operations Support Staff	0	3	3	3
Total	1	48	55	61

<u>Year 4</u>	<u>Year 5</u>
1	1
1	1
0	0
0	0
33	38
8	8
3	3
0	0
19	19
3	3
68	73

To: Charter School Advisory Board and Office of Charter School

Delivery via electronic submission

April 20, 2023

To the Charter School Advisory Board and Office of Charter Schools,

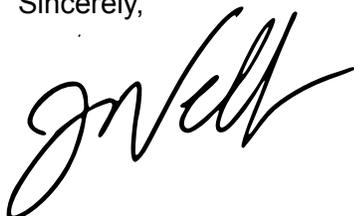
I am writing to confirm a mentorship relationship between the boards and staff of West Triangle High School and Carolina Achieve. We look forward to working closely with them to share our expertise and knowledge of best practices in governance and strategic planning. This will be a valuable opportunity for our organizations to learn from each other and grow together.

We are excited to collaborate with Carolina Achieve to provide students with the best educational experience. With that being the case we have agreed to an articulation agreement with rising 9th graders from Achieve. This will ensure students have a seamless transition from middle to high school.

Further, West Triangle High School has agreed to rent space to Carolina Achieve for 2-3 years should adequate space be available. This mutually beneficial arrangement will allow both institutions to work together in the same community. We are excited to embark on these new partnerships and look forward to working together.

Questions regarding the relationship can be addressed to Joseph Webb, Founder and Executive Director of WTHS, at josephbwebb@gmail.com

Sincerely,

A handwritten signature in black ink, appearing to read 'jwebb', written in a cursive style.