





Organization Information

Organization Name *

Carolina Scholars Academy

Telephone

Fax

Address

Unit/Suite

Zip Code

City

State



Primary Contact Name *

Tykayla Livingston

Opening Year *

2027

Is Management Organization Used

Yes No

Primary Contact Relation To Board *

Board Chair

Management Organization Name

National Heritage Academies

Management Organization Contact Name

Abby Baas

Primary Contact Email *

elitegeniuscharterschool@gmail.com

Management Organization Phone

6169291188

Primary Contact Phone *

2527676739

Management Organization Email

abaas@nhaschools.com

Primary Contact Address *

5488 U.S. 401 N

Unit/Suite *

Zip Code *

27549

City *

Louisburg

State *

North Carolina

Board Members Roster

Name	Street Address	Zip Code	Email	Expertise
Sierra Brooks	928 Stolls Lane	27545	brooks.sierra90@gmail.com	Organizational Leadership/ Education
Christina Gaffney	1142 River Street, Apt 2R	02136	christinaallison26@gmail.com	Education (Curriculum and Instruction)
Amanda Jefferson-Lewis	123 Stonehedge Drive	27537	amandajefferson@icloud.com	Education



Name	Street Address	Zip Code	Email	Expertise
Marla Mills-Wilson	1100 Birdsong Court	27596	mmillswilson1913@gmail.com	Science/ Charter School Leadership
Unique Traynham	12231 Oakwood View Drive, Apt 305	27614	utrayer52@gmail.com	Public Administration
Tykayla Livingston	5488 US 401 N	27549	elitegeniuscharterschool@gmail.com	Education/ Community Engagement



1. Application Contact Information

Q1. Name of Proposed Charter School

Carolina Scholars Academy

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

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

616-929-1060

Q3. Geographic County in which charter school will reside

Franklin County

Q4. LEA/District Name

Franklin County Schools

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

TBD

Q6. Was this application prepared with the assistance of a third party such as a consultant or Charter Support Organization (CSO)?

I. Definition - Charter Support Organization (CSO)

A for profit or nonprofit, nongovernmental entity that provides:

a. assistance to developers during the application, planning, program design, and initial implementation of a charter school; or

b. technical assistance to operating charter schools, including specific and limited services such as but not limited to professional development, nonprofit board development, payroll, and curriculum development.

Yes

No



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

National Heritage Academies (NHA)

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

N/A

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



Our founding Board is proposing Carolina Scholars Academy as a school that will serve all students, from all backgrounds, at all learning levels. The school will address multiple community needs, offering families a high-quality school choice beyond the traditional district, and a new school facility at no cost to the local taxpayers.

Our Board Chair serves as a director at an NHA-partner school in Wake County and saw an opportunity for a partnership serving the Franklin County community. Thorough evaluation and research caused our Board to believe that a partnership with NHA will allow our school the best chance to open successfully and serve students seeking an additional high quality educational choice.

NHA's work with 100 partner schools across the country, including 16 in North Carolina, has resulted in a documented record of success. This success leads us to believe our community will benefit from a school like Carolina Scholars Academy. We are confident in NHA's documented history of success in North Carolina.

Our school will utilize the innovative NHA model in place at 100 other schools who partner with the organization. NHA professionals have ensured that our application appropriately describes key facets of the model, including:

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

Although we benefit from the support and collaboration provided by NHA, our Board is submitting this proposal for Carolina Scholars Academy. Our Board independently developed our mission and vision, and desires to provide an additional high-quality educational opportunity to all students in Franklin County. Our plan for Carolina Scholars is clearly defined in this application. We reached out to NHA to assist in refining our academic goals and some operational details. NHA has experience and track record setting and pursuing goals for both our school and other partner schools across North Carolina. Their demonstrated track record of success leads us to believe that a partnership based on our shared priorities is in the best interest of the students and families we intend to serve.

We know that other nonprofit Boards have partnered with NHA in recent years to submit proposals for new charter schools in North Carolina. We understand that sections of our application may be similar to other boards partnering with NHA. Our Board makes clear that our application replicating the NHA model is ours. Our independent legal counsel is familiar with NHA and has reviewed portions of our application, including sections on governance and annual independent financial audits. We will continue working with NHA as we progress through the application process. If a charter for Carolina Scholars Academy is approved, we will proceed with our relationship with NHA through our services



agreement (Appendix A4.1).

Q10. Projected School Opening Month

August

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

- Yes (Year-Round)
- No

Q12. Complete the Enrollment Summary table (see resources), providing grade levels and total projected student enrollment for Years 1-5. Please note: If applying as a "FACE VIRTUAL" remote academy, the applicant must provide separate enrollment figures for in-person and remote student cohorts (see resources).

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

Resources

Enrollment Summary...

Applicant Evidence :

Carolina Scholars Ac...

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

At full capacity, Carolina Scholars Academy will serve 772 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



Resources



Enrollment Demogra...

Applicant Evidence :



Carolina Scholars Ac...

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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.

Our Board understands the need in Franklin County for additional high-quality educational choices. School choice offerings are limited within the county. There are currently three charter schools operating within Franklin County. Combined, these schools serve nearly one quarter of total Franklin County K-12 students. Additionally, NHA partners with six schools in the greater Research Triangle area, with a seventh school set to open in the fall of 2025. Combined, these schools serve over 4,000 students with nearly 300 additional students on wait lists.

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

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)



While we value the partnership and assistance of NHA, our Board is submitting this proposal for Carolina Scholars Academy. Our Board has thoroughly examined and discussed this proposal, and has voted to approve its submission. This application clearly articulates our vision and plans for our proposed school. Our Board recognizes that numerous elements of the practices, procedures, and systems outlined in this application are currently implemented at existing NHA-partner schools. As a result, considerable portions of the language in our application bear similarities to applications submitted in previous years.



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 Charter Schools Review Board (CSRB).

Carolina Scholars Academy

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

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



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Applicant Evidence :



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Q23.Name of Registered Agent and Address

- As listed with the NC Secretary of State

Tykayla Livingston, 5488 U.S. 401 N, Louisburg, NC 27549.

Q24.Federal Tax ID

33-4636337



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.

Q26. 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



4. Conversion

Q40. 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.



Q57. 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>)).

Q68. Do you want your application to be considered for an Alternative Charter School?

- Yes
- No



7. EMO/CMO

Q70. Does the Charter School plan to contract for services with an “educational management organization” or “charter management organization”?

Yes

No

Q71. EMO/CMO Mailing Address City, State, Zip

National Heritage Academies

3850 Broadmoor Ave. SE, Grand Rapids, MI 49512

Q72. EMO/CMO Website

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

Q73. Explain how the contract with the specified EMO or CMO will be in the best educational and financial interest of the charter school.



Our governing Board intends to partner with NHA in large part due to the comprehensive educational program it provides. We do not take lightly our responsibility to ensure the success of Carolina Scholars Academy. Members of our governing Board have extensive experience in education, curriculum direction, public administration, and organizational leadership. We have utilized these skill sets to build upon our understanding of NHA, and in turn, determine the organization to be the best fit as our management partner. Additionally, our Board Chair, Tykayla Livingston, has firsthand experience working with National Heritage Academies as a Director on the Wake Forest Charter Academy Board of Directors. We believe NHA's longstanding record of success both in North Carolina and across the country makes the organization the best partner for us.

NHA has a documented record of success in serving students from all backgrounds and needs in 100 partner schools across the county, including 15 in North Carolina (a 16th school is set to open in the fall of 2025). The organization has extensive experience in the charter school sector, serving approximately 66,000 students, with nearly 12,000 students on waiting lists. Specific to North Carolina, NHA-partner schools enroll over 11,000 students in 15 schools (over 5,000 students are on waiting lists).

Our driving motivation for Carolina Scholars Academy is to provide high-quality school choice beyond the traditional district, and a new school facility at no cost to local taxpayers. Partnering with NHA for a new K-8 school choice will provide families in our community the educational model they desire as demonstrated through the wait lists at current NHA-partner schools in the Research Triangle area. NHA serves over 4,000 students at six schools in the Research Triangle area, with a seventh school set to open in the fall of 2025. Nearly 300 students remain on waiting lists for these schools.

NHA's model includes a personalized curriculum, professional development, staffing, and more, plus a school facility. North Carolina charter schools partnering with NHA have replicated the success of partnerships nationwide, achieving academic results that lead to substantial outcomes for students. Our staff will also participate in regional professional development that will reinforce material from earlier development sessions while adding emphasis on new aspects of the model offered by NHA, such as interim assessments.

Best educational interest

NHA-partner schools have produced strong academic records and successful partnerships, as demonstrated by the following:

- Seven NHA-partner schools in North Carolina going through renewal in recent years received 10-year renewals, evidencing the strong success of the NHA model.
- In total, six NHA-partner schools have received the National Blue Ribbon Award, demonstrating their status as some of the premier education options for parents, including two schools in 2024.
- NHA has a demonstrated record of success in North Carolina. Greensboro Academy was recognized as a National Blue Ribbon School in 2023 and was ranked the number six charter elementary school in



the state in 2025.

- Since 1995 when the first NHA-partner school opened, NHA-partner schools have successfully applied for and been granted renewal of their charters on all but one occasion (Rochester, New York in 2005).
- Research from Stanford University's Center for Research on Education Outcomes (CREDO) shows that on average students increase their academic performance each year they attend an NHA-partner school. Specifically, NHA students receive the equivalent of an extra 69 days of learning in math each year and receive an extra 46 days in reading over the same timeframe (CREDO, 2023).

Best financial interest

NHA is making a significant investment in our community and the success of our school. We are grateful for their commitment but are not beholden to the organization.


- As part of our delegation of daily operations to NHA, NHA is obligated to provide start-up funds for the development of curriculum and a technology system, selecting, hiring, and training staff, and for ensuring that our facility is clean and appropriately equipped. These are start-up investments by NHA and deemed to be contributions to our Board, with no expectations of repayment.
- Once a charter is awarded, NHA commits to purchase real estate and build or renovate a building at no cost to the partner school board. NHA provides private capital to finance the facilities and provides these funds as a contribution, not a loan. This is typically a multi-million-dollar up-front investment to cover site plan reviews, permits, construction, and construction related costs.

As outlined throughout this application, our Board has come together to establish a new public school choice beyond the traditional school district and a new school facility at no cost to local taxpayers. There are currently three charter schools operating within Franklin County. Combined, these schools serve over 23 percent of total Franklin County K-12 students. It is clear that parents desire additional educational choice for their children.

Q74. Attach as Appendix A4.1: Executed or Draft Management Contract

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Applicant Evidence :


Appendix A4.1 - Exec...

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Q75. What other EMO/CMOs were pursued and why did the applicant select this one?



Please include information regarding other management organizations' fees and financial/academic records that led to the selection of the proposed EMO/CMO as the best fit for this proposed school.



We have chosen to partner with NHA to achieve our mission, vision, and goals. NHA partners with 100 schools nationwide to provide comprehensive support in preparing students from all backgrounds for high school, college, and beyond. We do not take lightly our responsibility to ensure the success of Carolina Scholars Academy.

Our Board Chair, Tykayla Livingston, recognized the need for a high-quality educational choice in her community and took action to make that happen. She took part in discussions with representatives from the Franklin County Board of Education and Charter Schools Review Board. Ms. Livingston toured a school managed by Charter One, but determined that the organization was not the right fit for her vision of Carolina Scholars Academy.

She was then connected with National Heritage Academies and currently serves as a Director on the Board of NHA-partner school Wake Forest Charter Academy. Seeing a need for an NHA-partner school in her own community, Ms. Livingston conducted multiple meetings with representatives of NHA, speaking with individuals familiar with its successful track record.

Members of our governing Board have extensive experience in education (including serving on the Board of a charter school), community advocacy, parent choice, public administration, and organizational leadership. We have utilized these skill sets to build upon our understanding of NHA, and in turn, determine the organization to be the best fit as our management partner. We believe NHA's longstanding record of success both in North Carolina and across the country makes the organization the best partner for us. NHA has a documented record of success in serving students from all backgrounds and needs and we believe that will serve our mission well.

Our members researched the benefits of a partnership with NHA, learning more about the positive aspects each includes in its model to make a difference in the lives of students. Additionally, our Board Chair saw the benefits of partnership with NHA firsthand as a member of the Wake Forest Charter Academy Board of Directors. NHA has extensive experience in the charter school sector, serving approximately 66,000 students in 100 partner schools with nearly 12,000 students on waiting lists in the 2024-25 school year. This includes 15 partner schools in North Carolina serving over 11,000 students with over 5,000 students on waiting lists. A 16th NHA-partner school in North Carolina is set to open in the fall of 2025. Our belief is that partnering with NHA is in the best interests of the families who will trust us to serve and grow their students.

Our Board will oversee academics, operations, and finances, holding NHA accountable to successfully deliver its model to Carolina Scholars Academy. NHA offers Carolina Scholars Academy – and Franklin County – a 21st Century-ready facility, coupled with long-term academic success for students from all backgrounds. Across their nationwide network, 65 percent of students qualify for free or reduced-price lunch, 79 percent are demographically minority, 10 percent are English learners, and approximately 13 percent are Exceptional Children.

Our Board understands that charter schools commonly face significant hurdles during their initial



years. This may include sufficient cash flow to provide the desired high-quality programming, hiring our school leader before opening, and more. Carolina Scholars Academy will avoid many risks new charter schools encounter by partnering with NHA. Our comprehensive services agreement, coupled with the organization's long-term commitment to our school, will ensure we are positioned well to pursue our mission and vision.

Q76. Provide and discuss student performance, governance performance, and financial data from other schools managed by the management company to demonstrate how this organization is a good fit for the targeted student population. Nationally, what are the highest and lowest-performing schools of the EMO/CMO? Why are these two schools so different in overall achievement?



NHA-partner schools yield admirable student outcomes and success. The most recently available public data in each of the states in which it operates (2023-24) shows that 71 percent of partner schools perform at a higher level than the local district. Furthermore, NHA and NHA-partner Boards implement strong governance practices, consistently receive clean audits, and maintain outstanding rates with regard to compliance.

NHA partners with 15 schools in North Carolina. During the 2023-24 school year, four schools exceeded growth and seven met growth. Overall, NHA-partner schools continue to outperform the state in all subjects except ACT Composite while serving a similar percent of economically disadvantaged students. Additional highlights are below.

- Greensboro Academy, Johnston Charter Academy, Peak Charter Academy, and Summerfield Charter Academy all outperformed their local district, state, and closest schools.
- Gate City Charter Academy and Summit Creek Charter Academy gained ground against their local district in every subject.
- Gate City Charter Academy, PreEminent Charter School, and Summit Creek Charter Academy gained ground against the state in every subject.
- NHA's distribution of growth statuses mirrored the state, with 73% of schools earning a 'Met' or 'Exceeded' rating.
- Greensboro Academy has regularly achieved high levels of academic success. For the eighth year in a row, Greensboro had a letter grade of "A" or "A+NG"
- Summerfield Charter Academy received a letter grade of "A" and exceeded growth.
- Peak Charter Academy received a letter grade of "B" and exceeded growth.
- Gate City Charter Academy, Matthews Charter Academy, Queen's Grant Community School, Summit Creek Charter Academy, and Winterville Charter Academy earned letter grades of "C" and exceeded or met growth.

Highest and lowest NHA-partner schools

On the 2023-24 state test ELA and math combined proficiency, 85 percent of students were proficient at Summerfield (NC). At Westfield Prep (MI), 14 percent of students were proficient. This difference can be attributed to student demographics (18 percent vs 74 percent FRL, respectively) and the proficiency rate of new students (81 percent vs 11 percent, respectively). In both cases, the school overall outperforms new student proficiency showing that staying at an NHA school increases proficiency.

Stanford University's Center for Research on Education Outcomes (CREDO) has found NHA's success to be significant. Research from a recent study found that on average students grow their academic performance each year they are enrolled in an NHA-partner school. This results in the equivalent of 46 additional days of learning each year in math and an additional 69 days in reading. CREDO has long researched academic outcomes, and in this study examined 81 percent of tested public school students in the United States resulting in over 6.5 million student-level observations. These records span 7,288 charter schools with at least one school match across 29 states (as well as New York City and Washington, D.C.). This study also includes charter school networks (such as NHA). CREDO's



research shows that NHA outperforms 82 percent of the other charter school networks studied. Additionally, NHA has been designated a gap buster, eliminating learning disparities for minority students and students in poverty. Overall, CREDO's work showed students enrolled in NHA-partner schools gain the equivalent of three and a half months of additional learning compared to their peers in traditional public schools over the course of a school year (46 additional days in reading and 69 additional days in math).

Board review of NHA financial health

Our Board understands NHA is a privately held organization. In the absence of NHA's financial records, our Board vetted its standing – both financially and in the other areas of high importance for our school – through direct conversations with representatives of the organization, conversations with others who have worked with the service provider, and by visiting other partner schools. Through this due diligence we learned of a longstanding and sustained track record of its partner schools maintaining strong financial health. Additionally, we have included with our proposal both a letter of strong financial standing provided by a banking institution with more than 10 years of working experience with NHA, as well as a letter from NHA's Chief Financial Officer committing the funds necessary to successfully launch- and operate- Carolina Scholars Academy (Appendix A4.3).

Q77. Describe how the governance structure will be affected, if at all, by the EMO/CMO, and particularly discuss how the board of directors of the charter school will govern the school independently of the EMO/CMO.



Our Board will exercise our statutory authority and contractual and fiduciary responsibilities at all times. Our Board will be independent of NHA, and we have contracted with independent legal counsel to advise us in our duties and our negotiations with NHA to ensure we maintain a strong level of local control over the school. Additionally, our independent legal counsel will assist us in ensuring we appropriately hold NHA accountable for providing success in academics, operations, and finances.

Our services agreement with NHA clearly outlines our independence, as well as the responsibilities of both NHA and our Board. We recognize that it is our Board that will hold the charter and that we are responsible for achieving our goals. We will hold NHA accountable for the academic results of our school and helping us meet our charter goals. Because NHA manages our school operations, we will also hold NHA accountable for the fiscal and operational soundness of our school. We are partnering with NHA to deliver an educational program that we are confident will serve our community well, achieve our charter goals, and advance our mission.

Our Board will have a separate lease agreement with NHA that guarantees that Carolina Scholars Academy can occupy the school facility for at least one additional full school year if we terminate our management relationship with NHA. Please see a draft of our lease agreement included as Appendix A4.1.

Our Board will regularly receive reports on the school's academic and operational progress. We will receive information on academic growth, comparative performance, accountability, and college readiness to evaluate academic progress. We will use student attendance data, parent and staff satisfaction survey results, and a comprehensive review of the overall performance of NHA as operational measures of accountability. Financial viability will be measured by the school's annual financial audit.

Each year Carolina Scholars Academy will develop a School Improvement Plan (SIP), a comprehensive needs assessment of the school's educational practices and the identification of strategies to meet those needs in the upcoming school year, with oversight from our Board. The SIP will provide a comprehensive analysis of student achievement, school environment, teacher community, parent community, and administrative data. The school will focus and prioritize building-wide professional development efforts on the areas identified in the SIP. We also will ask NHA to undertake a corrective action at any point, as a regular review of assessment results will be on our meeting agendas.

Q78. Provide a description of the relationship that will exist between the charter school employees and the Management Organization.



Staff at Carolina Scholars Academy will serve our school on an at-will basis and, as outlined in our services agreement, teachers will be employed by NHA. Our Board will require our school leaders to work with NHA to staff the school in accordance with expertise, strengths, performance, and how to best meet the needs of students who enroll with us. Our school's climate and culture will allow school leaders, our Board, and NHA to make decisions in the best interest of our students. This includes identifying ineffective staff, offering additional structures and support, or termination of employment.

Under the provisions of our proposed services agreement with NHA, our Board maintains the authority to express reasonable dissatisfaction with the principal. If NHA and the principal have been given sufficient time and support to remedy an issue and there has been insufficient improvement, the Board can direct NHA to terminate the principal.

We will benefit from NHA's comprehensive and proven systems to offer employee benefits, payroll, employment compliance documentation, retirement programs, and additional human resources functions. These systems are in use at other North Carolina NHA-partner schools.

Q79. Explain how the contract includes measurable objectives whereby the charter school board can evaluate annually the performance of the EMO/CMO, and if necessary, terminate the contract without significant obstacles.



Our governing Board plans to annually evaluate the performance of NHA and will review data to ensure that the school is making progress toward the charter goals. NHA is contractually obligated to ensure Carolina Scholars Academy remains in good standing with regards to the compliance of our charter.

Each year, we will hold NHA accountable for the academic, operational, and financial outcomes of Carolina Scholars Academy. This will include:

- Academic growth, proficiency, and achievement goals (outlined in the “Goals” portion of this application).
- Operational target goals, including on student attendance (at least 90 percent), parent satisfaction (70 percent or higher with at least 50 percent of parents responding to the satisfaction survey), and fiscal soundness (a balanced budget and an unqualified audit annually).
- NHA will be required to work with school leaders to perform a comprehensive annual review of the school’s education program, developing a formal, action-specific School Improvement Plan provided to our Board for review, input, and approval.
- The Board will regularly conduct a formal performance review of NHA.

Additionally, we may contract periodically with an outside third party that has experience and expertise in evaluating the performance of charter schools to evaluate the school. Included in such an assessment will be an evaluation of NHA’s operation of the school and the services it is providing, and an evaluation of the progress school leaders are making in meeting expectations for the school. This report is expected to serve as the foundation of an improvement action plan developed collaboratively with the Board and NHA and implemented as soon as practical after the report has been presented to and discussed by the Board.

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

Q80. Is the facility provided by the EMO/CMO?

- Yes
- No

Q81. Attach as Appendix A4.2 Facility Buyout Agreement, if applicable

Please see attached Appendix A4.2 - Facility Buyout Agreement. This appendix explains Carolina Scholars Academy’s relationship with National Heritage Academies regarding the use of a school facility as specified within our lease agreement.



Applicant Evidence :



Appendix A4.2 - Facili...

Uploaded on **4/23/2025**

by **Franklin County
Charter**

Q82. List the fund balance and surpluses for each school managed by the EMO/CMO over the last three years in North Carolina.

In 2024-25, 15 charter schools in North Carolina partnered with NHA through agreements similar to the one we propose. They maintained positive fund balances throughout the past three fiscal years (FY22, FY23, FY24):

- Forsyth Academy (\$51,814, \$63,712, and \$77,350)
- Gate City Charter Academy (\$49,941, \$35,298, and \$10,687)
- Greensboro Academy (\$72,114, \$76,769, and \$88,618)
- Johnston Charter Academy (\$50,087, \$46,383, and \$34,328)
- Matthews Charter Academy (\$81,357, \$75,385, and \$64,743)
- Peak Charter Academy (\$48,811, \$53,482, and \$37,464)
- Phoenix Academy (Partnership with NHA was approved in March 2022) (\$5,234,046, \$4,716,173, and \$4,795,666)
- PreEminent Charter School (\$46,000, \$45,331, and \$41,295)
- Queen's Grant Community School (\$2,861,934, \$5,278,655, and \$6,103,746)
- Research Triangle Charter Academy (\$85,435, \$76,698, and \$67,056)
- Rolesville Charter Academy (\$40,594, \$54,503, and \$54,607)
- Summerfield Charter Academy (\$85,180, \$69,982, and \$43,437)
- Summit Creek Academy (\$32,305, \$25,334, and \$20,624)
- Wake Forest Charter Academy (\$65,326, \$58,800, and \$59,671)
- Winterville Charter Academy (\$64,244, \$95,798, and \$103,510)


Partner school audits for the 2024-25 school year are not yet final, and the figures provided have not yet been audited. Each partner school's Board of Directors directs the use of up to \$35,000 annually included within its budget. Boards direct the expenditure of discretionary funds for both educational and/or extracurricular expenses beyond the model educational and operational programming. Boards also have the ability to reserve these funds for future consideration and determination. One of the advantages of our partnership with NHA is its commitment to providing initial and ongoing investment to ensure schools open successfully. This includes certain contributions to make certain the educational program is implemented from day one. NHA assumes obligation for a school's expenses, meaning it assumes certain financial risk.



Q83. Attach Appendix A4.3: EMO/CMO Financial History Provide as Appendix A4.3 the financial history and statements of the EMO/CMO over the last three years. Specifically, if contracting with an EMO, provide confirmation that the EMO is in good standing by providing bank statements from the prior three years.

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

Applicant Evidence :



Appendix A4.3 - EMO-...

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Q84. Attach Appendix A4.4: IRS Form 990 Provide as Appendix A4.4 the IRS Form 990 (or equivalent documents if the organization does not file a 990) for the prior three years

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

Applicant Evidence :


Appendix A4.4 - IRS F...

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8. Remote Academies

§ 115C-218.120(a). Remote charter academies.

A charter that includes a remote charter academy may do any of the following:

- (1) Provide only remote instruction to enrolled students served by the charter in accordance with this Part.
- (2) Provide remote instruction to students enrolled in the remote charter academy and provide in-person instruction to other students served by the charter.
- (3) Provide enrolled students both remote instruction and in-person instruction. **A student who receives more than half of the student's instruction through remote instruction shall be classified as enrolled in the charter's remote charter academy.**

Q85.

Is the school you're applying to create a remote charter academy?

Yes

No



9. Mission Purposes, and Goals

9.1. 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.

Q112. 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.

Our mission is to inspire a love for learning through innovative, inquiry-based education. We empower students to become lifelong learners and responsible global citizens.

Q113. 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.

We envision a future where every student thrives in a dynamic and engaging educational setting that celebrates the potential of each child, encourages critical thinking, and nurtures individual talents. Through cutting-edge technology, personalized learning, and collaborative projects, we prepare students to excel in a rapidly changing world.

Q114. Educational Need and Targeted Student Population of the Proposed Charter School Does the school plan to provide services to certain targeted subgroup(s), if so please explain? 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 MLL 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 Scholars Academy proposes to open in 2027 with grades K-5, offering 100 seats in kindergarten, and 84 seats each in grades 1-5. We will eventually grow to a full K-8 configuration by adding one grade a year. By our fourth year, our school will offer a high-quality K-8 school choice. Once our school is established, we hope to one day expand to offer a Pre-K program to serve even more children in the Franklin County area.

Carolina Scholars Academy will not target a specific student population. Instead, we will aim to serve students from all backgrounds and with varying needs. Fifty-one percent of Franklin County families contacted in an anonymous survey expressed their interest in a new school choice. Additionally, only 46 percent of respondents expressed satisfaction with the quality of education at their child's current school. This leads us to believe we will receive interest from families across Franklin County. Our partnership with NHA will allow us to direct our marketing and outreach efforts to families in Franklin County and the surrounding area.

It is likely that our enrollment will be similar to the student populations of Franklin County Schools (FCS). Student demographics include:

Franklin County Schools

- White: 35.9 percent
- Hispanic: 26.0 percent
- African American: 30.8 percent
- Multiracial: 6.5 percent
- Asian: 0.6 percent
- American Indian: 0.2 percent
- Pacific Islander: 0.04 percent

Approximately 56 percent of the student population at FCS are economically disadvantaged. Just over eleven percent of FCS students are Multilingual Learners (ML), while approximately 14 percent are Exceptional Children (EC).

Q115. 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?



Parents in Franklin County are seeking additional high-quality school choice offerings. With only three charter schools in the county, our proposed facility will provide additional school seats at no cost to taxpayers. Nearly twenty-two percent of those living in our area are under the age of 18, and Franklin County Schools (FCS) enrolls approximately 7,870 students. In 2024, 25.3% of 3rd-8th graders enrolled in Franklin County Schools earned college-and-career-ready scores in reading. 30.8% of 3rd-8th graders earned college-and-career-ready scores in math. Carolina Scholars Academy will create a high-quality K-8 facility, assisting the community in increasing school choice options in our area.

As indicated, FCS serves approximately 7,870 students. 35.9 percent of students are White, 30.8 percent are African American, 26.0 percent are Hispanic, 6.5 percent are Multiracial, 0.6 percent are Asian, 0.2 percent are American Indian, and 0.04 percent are Pacific Islander. Approximately 54 percent of students are eligible for free or reduced-price lunch.

As a component of our partnership with NHA for daily school operations, Carolina Scholars Academy's educational programming will utilize the NHA model. We believe that NHA's commitment to ensuring student success through personalized instruction and systematic intervention will be attractive to area families. This model is currently in place at six other NHA-partner schools in the Research Triangle area, with a seventh school set to open in the fall of 2025. Over 4,000 students are currently enrolled at these schools, with nearly 300 more students on the wait lists.

Q116. 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).

Carolina Scholars Academy will initially open in 2027-28 with grades K-5 (520 students). We will add one grade each year until we offer a full K-8 configuration in 2030-31 (772 students).

Despite not opening with all K-8 grades, our partnership with NHA will ensure we have all necessary resources for our full academic program. This includes having the full Carolina Scholars Academy leadership team onboarded when we open. Our facility will be ready to serve students in Pre-K through eighth grade on our first day (despite opening with grades K-5). This will position us well, as we focus on quickly and efficiently putting into place programs, procedures, and practices without any future construction disruptions. We ultimately intend to apply to offer a Pre-K program at Carolina Scholars Academy and will be set up for a smooth transition, with our facility already constructed.

As noted throughout our proposal, our area will benefit from additional educational choice. The 520 students served by Carolina Scholars reflects approximately 15 percent of the K-5 students currently served by Franklin County Schools.



Q117. Summarize what the proposed school will do differently than the surrounding schools serving the same population of students. What will make this school unique and more effective than the currently available public-school options?



We plan to utilize the NHA model that has been proven successful with students in this area. However, our program will differ from other NHA schools in that it will be tailored to the needs of the students in our area. Our school will be an example of North Carolina's legislative purposes for charter schools. Our school will provide opportunities for families that align with the intent of successfully offering a high-quality school choice. Listed below are a few key differentiators:

- *K-8 school design:* Our school is designed to make an early investment in the students we serve and to continue that investment steadily until students reach high school. Students' educational experiences in middle school are critically important to adequately prepare them for a rigorous, college-preparatory high school program. Research shows that learning during the students' formative years is the foundation of their future academic success.[1] Studies by ACT note that "the level of academic achievement that students attain by eighth grade has a larger impact on their college and career readiness...than anything that happens academically in high school." [2]
- *Distributed leadership model (Dean model):* Our school will utilize a distributed leadership model ("dean model") which will see a principal and grade-level deans offering teachers dramatically more observation, coaching, and feedback than teachers typically receive in other school settings and configurations.
- *Moral focus:* We will implement a moral focus program to teach and model high expectations, responsibility, and positive behaviors through a curriculum built on virtues such as perseverance, compassion, integrity, and courage. Our students will learn that their best effort is important to academic success; consequently, teachers will ensure students know what is expected of them.
- *Parental partnerships:* Relationships with parents and guardians will be of the utmost importance at Carolina Scholars Academy. We will actively engage them in their students' learning, provide frequent and meaningful communication, and offer a welcoming environment that includes a dedicated area specifically for parents and guardians to interact with school staff.
- *Professional opportunities for teachers:* Our school will provide school staff with professional development to assist them in succeeding in their current roles. This will also develop credentials for advancement. The foundation of opportunity is compensation that is broad and deep, with competitive salaries, merit pay, benefits, and retirement.
- *School accountability:* Our school will hold all stakeholders (Board, leadership, teachers, students, and NHA) accountable for the academic outcomes of our school. We will adhere to the state accountability model. Students will complete state assessments, and results from those tests will be the foundation of our self-evaluation. Our governing Board will require NHA to measure results on operational matters that include parent satisfaction, school finances, and attendance.
- *Increased learning opportunities:* Our school will cultivate and foster a school community focused on innovation to meet the needs of all students. We intend to prepare students for high school, college, and career by emphasizing blended learning, small-group learning, and online learning tools and results from aligned assessments. This will assist in personalizing and differentiating instruction to maximize flexibility for teaching and learning.
- *Instructional innovation:* Instructional staff will benefit from ongoing professional development, scheduled planning time with peers, weekly coaching, and collaboration with a professional learning community. These will encourage design and implementation of creative variations on best practices.



School-wide framework

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

- *Establish a professional culture of excellence:* Our school community will be motivated to achieve high expectations and to exhibit high care for all of its members.
- *Systematize collaborative improvement:* All staff will work in collaborative, data-driven teams in pursuit of improved student learning through shared study and instructional best practice.
- *Lead instructional excellence:* Deans will have focused instructional coaching as the top priority, to ensure high-quality learning for every student, in every classroom, every day.
- *Implement systematic intervention:* We will identify the needs of academically at-risk students, exceptional children, Multilingual Learners (ML), and gifted and talented students. We will also provide tailored instruction and systematically monitor student progress.
- *Cultivate meaningful parent partnerships:* Parents and Carolina Scholars Academy staff will connect to understand and support each other in a caring and meaningful way, working in partnership to help every child achieve college readiness. In partnering with parents to prepare students for an opportunity to attend college, we will also be setting them up for success should they choose alternative endeavors.

Classroom framework

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

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

[1] George Kuh, Jillian Kinzie, Jennifer Buckley, Brian Bridges, & John Hayek, *What Matters to Student Success: A Review of the Literature*. (National Postsecondary Education Cooperative, 2006).

[2] ACT, *The Forgotten Middle: Ensuring that All Students Are on Target for College and Career Readiness before High School* (Iowa City, IA: ACT, 2008).

Q118. 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

Franklin County is a fast-growing area, with many families seeking additional school choice options. The county's population has grown by over 31 percent since 2010 and has grown by over 16 percent in the last four years alone. Carolina Scholars Academy will offer additional high-quality educational choice seats on a 21st Century-ready facility at no cost to local taxpayers. To gauge interest in our school, we reached out to families in Franklin County. We asked if families would be likely to send their student to a new K-8 charter school in the area. (see Appendix A). The results confirmed our belief that there is a strong demand for our school:

- Fifty-one percent of families surveyed answered they would be very likely of likely to send their student to a new K-8 charter school in the area; and,
- Only 46 percent of respondents expressed satisfaction with the quality of education at their child's current school.
- Only 33 percent of parents believed that the broader school system is delivering a good education to their children.

Beyond our positive survey results, our Board has seen firsthand the demand for increased educational choice in Franklin County. There are currently three charter schools operating within Franklin County. Combined, these schools serve over 23 percent of total Franklin County K-12 students and see many students left on wait lists. Additionally, NHA partners with six schools in the greater Research Triangle area, with a seventh school set to open in the fall of 2025. Combined, these schools serve over 4,000 students with nearly 300 additional students on wait lists.

Parent satisfaction is an additional key indicator of demand for schools. Survey data proves that Franklin County parents are dissatisfied with the education their children are currently receiving. Our school will provide additional choice to these parents, offering them a school that will prepare their students academically for high school, college, and career.

We are highlighting our efforts via a landing website and Facebook advertisements. Our landing website is live, and is receiving outreach from families indicating their interest in enrolling with Carolina Scholars Academy should it be awarded the opportunity to open.

Our school will benefit from strong relationships with nearby NHA-partner schools, as well as those across the state. Our Board, school leaders, and staff will collaborate on ideas, work through experiences, and brainstorm on decision making opportunities to continue our pursuit of achieving our school's mission. Our Board Chair, Tykayla Livingston, is an active parent in the Franklin County community and has already begun cultivating relationships in support of Carolina Scholars Academy.

Q119. 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 - Evidenc...

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by **Franklin County**

Charter

9.2. Purposes of the Proposed Charter School

Q120. 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.

Q121. Provide a brief narrative to coincide with each applicable legislative purpose(s).



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

Professional opportunities for teachers

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

School accountability

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

Expanded educational choice

Carolina Scholars Academy intends to open as a high-quality educational choice for families in Franklin County. Franklin County has undergone continual growth, seeing its population increase by over 31 percent since 2010. From April of 2020 to July of 2024 alone, Franklin County's population grew by over 16 percent. Currently, nearly one quarter of Franklin County students enroll in a charter school. With only three charter schools in the county, our proposed facility will provide additional school seats at no cost to taxpayers. Additionally, our school will meet the needs of those families seeking alternative educational options who may have been waitlisted at existing charter schools.

Our configuration of having grades K-8 will differ from the offerings in Franklin County Schools, and our students will benefit from not having to face the transition typically experienced in sixth grade. Additionally, our school's intended moral focus curriculum will assist students in strengthening their character and enhancing their preparation for high school, college, and beyond.

Improved learning



NHA has a documented record of success in North Carolina that dates back to 1999. Their success with students has us confident about our school growing students to its full potential. Consider the following:

- Greensboro Academy earned the highest state accountability rating in each of the last eight years with publicly available data.
- Summerfield Charter Academy as earned the highest state accountability rating for the past two years.
- In 2023-24, 11 of 15 NHA-partner schools with state assessment results met or exceeded growth.
- In 2023-24, nine out of 15 NHA-partner schools outperformed their local district in combined ELA and math proficiency.
- In 2023-24, nine out of 15 NHA-partner schools outperformed their closest schools.
- In 2023-24, and seven NHA-partner schools outperformed both their local district and closest schools.
- Seven NHA-partner schools in North Carolina have recently earned full 10-year renewals.

Increased learning opportunities

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

Instructional innovation

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

9.3. Goals for the Proposed Charter School

Q122. Provide specific and measurable goals for the proposed school for the first 5 years of operation outlining expectations for the proposed school's operations, academics, finance, and governance. Address how often, who, and when the information will be communicated to the governing board and other stakeholders.



The Carolina Scholars Academy Board is committed to reviewing and monitoring student achievement. We will strive for excellence and hold both Carolina Scholars Academy staff and NHA accountable as we pursue our goals. We intend for our goals to be similar to those in place at other NHA-partner schools in North Carolina and across the nation. We believe it is in the best interest of our school to implement these as well. In addition to the goals included below, we will ensure Carolina Scholars Academy complies with all goals contained in the Charter Schools Review Board renewal rubric.

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

- Each year, the mean normal curve equivalent gain on Education Value-Added Assessment System will be, at a minimum, 'Meets Expected Growth'.

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

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

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

- Each year, the school will end the year with a balanced budget.
- Each year, the school will have an unqualified audit.
- Each year, the average daily attendance rate of students will be at least 90 percent.
- Each year, overall satisfaction will be at least 70 percent on the parent satisfaction survey.

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

Q123. How will the governing board know that the proposed public charter school is working toward attaining their mission statement?



Carolina Scholars Academy's mission will guide all Board decisions. We will center our discussions on our mission and vision to ensure we remain focused on the school's best interests regarding academics, operations, and finances. Four key questions will guide our conversations:

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

Enrollment will serve as a crucial early indicator of our school's success. We expect to receive more interest in Carolina Scholars Academy than the number of seats initially available. An anonymous survey of Franklin County families showed that 51 percent expressed interest in a new school choice, while over 50 percent rated their child's current education quality as average or below. This leads us to believe we will attract families from across Franklin County, likely resulting in a wait list at the start of the school year. It also reinforces the notion that families desire additional school choices in our community. We plan to begin with grades K-5 and add one grade annually until we offer a complete K-8 configuration.

We will require our principal and NHA to provide regular reports on student performance, assessment data, operational metrics, and parent survey results. A review of this data will be a standing agenda item for all Board meetings. We will use this information to analyze Carolina Scholars Academy's progress towards our performance goals and performance of the principal. Additionally, we will address any obstacles to meeting objectives and collaborate to identify solutions.

Among the reports we will regularly review are:

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

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



On an ongoing basis, we will review how Carolina Scholars Academy is operating, how teachers are delivering instruction, and how students are learning. By requiring these regular reports and updates, our Board will work with NHA to provide appropriate resources to ensure we do not fall short in any particular area.

Our Board will be committed to development and will participate in online and in-person trainings offered by the NCDPI Office of Charter Schools to assist us in governing Carolina Scholars Academy. We will utilize additional training from organizations including the North Carolina Coalition for Charter Schools and the National Association for Public Charter Schools.

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



10. Educational Plan

10.1. Instructional Program

Q124. 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 Scholars Academy will benefit from a data-driven instructional approach. We will use processes designed to include multiple checkpoints throughout instruction that measure understanding of content. Teachers will analyze data at both the classroom and individual student levels and then identify building blocks of instruction that scaffold student learning appropriately. This will enable teachers to determine exactly what knowledge needs further development in each student, and to individualize instruction as appropriate to ensure that each student learns as expected.

Our school will implement the innovative NHA model in place at 100 other schools who partner with the organization. NHA has partnered with schools for nearly 30 years, and in doing so has developed a record of success and innovation in terms of academic outcomes, operational efficiencies, teacher development, and strong financial stewardship. This includes utilizing NHA's four pillars (*academic excellence, student responsibility, parental partnerships, and moral focus*). Our intention is for our school to offer an instructional program that is research-based, data-driven, and aligned to state standards. This will prepare students for high school, college, career, and the lives that they will lead. We will make sure our instructional program is advancing the legislative purposes of charter schools.

School-wide framework

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

- *Establish a professional culture of excellence:* Our school community will be motivated to achieve high expectations and to exhibit high care for all of its members.
- *Systematize collaborative improvement:* All staff will work in collaborative, data-driven teams in pursuit of improved student learning through shared study and instructional best practice.
- *Lead instructional excellence:* Deans will have focused instructional coaching as the top priority, to ensure high-quality learning for every student, in every classroom, every day.
- *Implement systematic intervention:* We will identify the needs of academically at-risk students, students with special needs, Multilingual Learners (ML), and gifted and talented students. We will also provide tailored instruction and systematically monitor student progress.
- *Cultivate meaningful parent partnerships:* Parents and Carolina Scholars Academy staff will connect to understand and support each other in a caring and meaningful way, working in partnership to help every child achieve college readiness. In partnering with parents to prepare students for an opportunity to attend college, we will also be setting them up for success should they choose alternative endeavors.

Classroom framework

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

- *Classroom culture:* Teachers will strive to lead self-managing classrooms by building positive relationships, sustaining classroom routines and procedures, and holding students accountable to



clear behavioral expectations.

- *Planning:* Teachers will plan instruction by identifying and analyzing standards to be taught throughout the year, aligning instructional resources and activities to those standards, and preplanning differentiated opportunities to meet student learning needs.
- *Teaching:* Teachers will deliver content at a level of rigor that challenges students, cognitively engages them, uses all time for learning, and personalizes instruction.
- *Assessing:* Teachers will implement assessment strategies to understand student learning needs, provide actionable feedback, and guide instructional decisions.

Basic learning environment

Our school will be an in-person learning environment that focuses on rigor, personalized instruction, student responsibility, and uses blended learning.

- *Rigor:* Our program will be aligned to the North Carolina Standard Course of Study. Content will be taught at an appropriate level of rigor that cognitively engages students, intentionally uses all time for learning, personalizes instruction, and ultimately challenges students to drive their own learning. We will use alternative teaching models, such as co-teaching for special education, and will integrate this into our classroom framework student needs.
- *Personalized instruction:* Our school will focus on small-group instruction and effective learning strategies, including ways to facilitate and pace student-driven instruction. It is anticipated that most lessons will begin with a small block of direct instruction, and then students will transition to small-group settings.
- *Blended learning:* To customize learning, we may use online learning tools to create a blended learning environment. Small-group and blended learning approaches enhance flexibility on the time, pace, and place students learn. Programs like Dreambox, Lexia, and SORA gather valuable information and transmit it to teachers. With this wealth of information available in real time, teachers can more effectively customize learning to each child's needs.

We will use processes designed to include multiple checkpoints throughout instruction that measure understanding of content. Teachers will analyze data at the classroom and individual student levels and then identify building blocks of instruction that scaffold student learning appropriately.

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



skills to novel situations, or promote development of higher-order thinking skills.

Our instructional strategies provide a comprehensive approach of delivering educational content while incorporating the flexibility to adapt instruction to meet student needs and learning styles. Teaching will include effective, research-based instructional strategies embedded within daily lesson plans and implemented during daily instruction. Strategies that have high probabilities of effectiveness will be employed by teachers to meet student needs.

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

Assessments

Our school will administer frequent, varied assessments throughout the year to ensure that students make appropriate progress pursuing mastery of state standards. This will include ongoing formative assessments, NHA's common assessments, state assessments, and internally created assessments.

Our key assessments will include:

- *Formative assessments:* Carolina Scholars Academy will administer formative assessments to provide important benchmark data on student growth.
- *Interim assessments:* We will administer interim assessments two or three times per year to give deans and teachers long-term snapshots of students' learning and preparation for end-of-year state assessments. These interim assessments have been designed by NHA to align with the North Carolina Standard Course of Study and are highly predictive of proficiency on the state assessment.
- *Unit tests:* Teachers will administer unit tests in specific subjects after completing instruction in that area of learning. Students who score poorly will be re-taught and re-tested.
- *Quizzes:* Teachers will challenge students with quizzes at the end of each week to take a quick snapshot of student learning covered that week. Data from these quizzes, which are also closely aligned with state standards, are analyzed in real time so teachers know whether and how they must modify instruction. In fact, at NHA-partner schools, it is common for instructional professionals to modify teaching plans within a day of receiving quiz results.
- *Exit tickets:* On any day, teachers may give an exit-ticket assessment based on the standard that was the focus of that day's lessons. Because our instructional plans are driven precisely by standards, a simple roomful of thumbs up or down will offer teachers valuable, aligned, and actionable feedback.

Using assessment data

Our school's educational philosophy is based on an overarching approach to teaching and learning that prioritizes assessments throughout the instructional process to make modifications based on student needs. The assessments described throughout this section will ensure that teaching is adapted and accelerated to meet the needs of students.



Teachers, school leaders, and parents will have regular access to data through the NHA network and we expect that all stakeholders within our school community will have frequent conversations on assessment data to ensure that instruction is meeting the needs of all students. The review of school data will be a standing agenda item for our Board meetings.

Our school leadership team will be in charge of the administration of these assessments, including sharing data with relevant parties. NHA's Information and Analytics team will support data collection and analysis, reporting creation, and data warehousing.

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

- School leaders will weigh aggregate data to evaluate school-wide and classroom performance and to direct improvement efforts at the school-wide level.
- Working with deans and others, classroom teachers will use assessment data to understand classroom performance and to modify instructional tactics to address learning needs highlighted by the data. Grade-level teams and deans will assess grade-level performance and identify standards and core content areas on which learning must improve.

Our Board will review assessment data to consider the degree to which curriculum and instruction is meeting the needs of our students, our goals, and the terms of our agreement with NHA. We will access the information through our online Board Portal, which will include all our meeting materials and corporate documents, as well as relevant school performance information. NHA will also produce a suite of reports for the Board to review at our regular meetings which will cover student academic performance at the school and subgroup levels, and other critical components. Furthermore, our annual evaluation of the school and NHA will leverage student assessment data to review our program's effectiveness and generate recommendations for our Board and school leadership.

We will regularly test the efficacy of teaching and quality of learning with a range of assessments that monitor the progress of all students. In designing assessments, we will prioritize close alignment with state standards because we know data from aligned assessments allows us to modify instructional tactics with confidence that we are giving students the best preparation for end-of-year state assessments.

Meeting the needs of target student population

Our commitment to data-driven instruction will enable us to continuously evaluate and refine the instructional methods we choose and to differentiate instruction in culturally responsive ways to meet specific learning needs of individual students. Our community of educators will hold regular data meetings at which deans will lead a review of results from previous assessments. These work sessions



will help teachers use data to modify instructional plans and personalize instruction. Carolina Scholars Academy will complement these efforts with robust professional development for teachers to ensure that they have the skills and knowledge to analyze assessment data and use insights from that data to refine lesson planning and instructional tactics.

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

Q125. Will the proposed charter school serve a single-sex student population?

- Yes
- No

Q129. 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.



Basic learning environment

Our school will be an in-person learning environment that focuses on rigor, personalized instruction, student responsibility, and uses blended learning.

- *Rigor:* Our program will be aligned to the North Carolina Standard Course of Study. Content will be taught at an appropriate level of rigor that cognitively engages students, intentionally uses all time for learning, personalizes instruction, and ultimately challenges students to drive their own learning. We will use alternative teaching models, such as co-teaching for special education, and will integrate this into our classroom framework student needs.
- *Personalized instruction:* Our school will focus on small-group instruction and effective learning strategies, including ways to facilitate and pace student-driven instruction. It is anticipated that most lessons will begin with a small block of direct instruction, and then students will transition to small-group settings.
- *Blended learning:* To customize learning, we may use online learning tools to create a blended learning environment. Small-group and blended learning approaches enhance flexibility on the time, pace, and place students learn. Programs like Dreambox, Lexia, and SORA gather valuable information and transmit it to teachers. With this wealth of information available in real time, teachers can more effectively customize learning to each child's needs.

We will use processes designed to include multiple checkpoints throughout instruction that measure understanding of content. Teachers will analyze data at the classroom and individual student levels and then identify building blocks of instruction that scaffold student learning appropriately.

Class size

When Carolina Scholars Academy reaches full capacity, we will have four kindergarten classes with approximately 25 students each. In grades one through eight, we are planning to serve approximately 28 students per class. Through our high expectations for student behavior, small-group instruction, and blended learning components, this class size will serve us well.

Q130. Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model. Provide evidence that the chosen curriculum has been successful with the target student population, how the plan will drive academic improvement for all students, and how it has been successful in closing achievement gaps.



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

Alignment to mission

The progression of standards in our curriculum is designed to ensure that we prepare students for to be lifelong learners in high school, in college, and beyond. The academic rigor and our culture of high expectations align with our mission to help every student, K-8, develop a love for learning and become responsible global citizen. Our curriculum's emphasis on personalized instruction allows teachers to use innovative teaching methods to tailor instruction to each student's individual needs, empowering them to learn effectively.

Alignment to student population

We expect to enroll students who have academic deficits, others who are learning at grade-level, and others who are intellectually gifted, but we are not targeting our enrollment efforts at any specific population. NHA's model has proven to be effective in serving students from diverse communities, backgrounds, and socio-economic statuses.

Alignment to accountability model

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

Planned components

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

Evidence of curricular strength

Curricula implemented in NHA's 100 partner school network across nine states have driven results that have, over time, surpassed those of neighboring schools.

- Overall, in 2024-25, 71 percent of NHA-partner schools outperformed their local school district.
- In 2024-25, 68 percent of NHA-partner schools outperformed their closest schools.
- Eighteen NHA-partner schools took Top 10 spots in the U.S. News & World Report's 2025 Best Charter Elementary and Middle School lists across three different states.
- Two NHA-partner schools were named 2024 National Blue Ribbon Schools. In total, six NHA-partner schools have received the National Blue Ribbon Award, demonstrating their status as some of the premier education options for parents



- Greensboro Academy was recognized as a National Blue Ribbon School in 2023.
- In 2022-23, an internal analysis indicated that when compared to institutions with similar economically disadvantaged populations, 88 percent of urban NHA-partner schools performed higher than expected in ELA and math.
- Over the last three years, overall parent satisfaction across all NHA-partner schools has consistently exceeded 80 percent in annual spring surveys.

Q131. 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.



Instructional strategies

Teachers at Carolina Scholars Academy will be expected to use many instructional methods that provide effective learning for each individual student. Our primary methods will include direct instruction, modeling, demonstration, and think-alouds. Guided instruction may be done with large groups or with small, needs-based groups during workshop time or during content-area learning blocks to allow for differentiation of instruction. A blended learning approach will be used during workshop time to meet the individual learning needs of students at all levels.

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

Our instructional strategies provide a comprehensive approach of delivering educational content while incorporating the flexibility to adapt instruction to meet student needs and learning styles. Teaching will include effective, research-based instructional strategies embedded within daily lesson plans and implemented during daily instruction. Strategies that have high probabilities of effectiveness will be employed by teachers to meet student needs.

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

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

Increased academic achievement

These instructional strategies provide a comprehensive approach of delivering educational content while incorporating the flexibility to adapt instruction to meet individual student needs and learning styles. Combined with the use of formative assessment to provide multiple measures of student performance data, our school as a whole will be able to adapt the delivery of educational content as



student needs dictate. This is expected to result in the ability of each student, regardless of his or her academic starting point, to make measurable academic progress throughout the school year. Our approach is designed for student academic success and will build upon foundational content and skills in the early grades to implement more complex inquiry and learning strategies in the later grades.



Q132. 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 Scholars Academy students will be expected to progress academically through one grade level each year. Our program is designed to ensure that students are prepared for high school, college, and/or career.

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

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

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

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

Q133. Describe in a brief narrative how the yearly academic calendar coincides with the tenets of the proposed mission and education plan.



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

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

Q134. Describe the structure of the school day and week. Include the number of instructional hours/minutes in a day for core subjects such as language arts, mathematics, science, and social studies. Note the length of the school day, including start and dismissal times. Explain why the school's daily and weekly schedule will be optimal for student learning.

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

As currently envisioned, our school day will last seven hours, beginning at 8:00 a.m. and ending at 3:00 p.m. We will provide 6.5 instructional hours each day. Our structure will offer families additional educational time beyond the traditional district schools in our area.

Anticipating that we will provide roughly 1,070 hours of instruction each year, our school will exceed the required minimum instructional hours.

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

Q135. Describe a typical day for a teacher and a student in the school's first year of operation.



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

Typical day

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

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

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

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



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

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


Q136. Will this proposed school include a high school?

- Yes
- No

Q142. 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 - Curricul...

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by **Franklin County**
Charter

Q143. Attach Appendix D: Yearly Academic Calendar (minimum of 185 instructional days or 1,025 hours)

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



Applicant Evidence :



Appendix D - Yearly A...

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Charter

Q144. Attach Appendix E: Daily and Weekly Schedule Provide a sample daily and weekly schedule for each grade band (K-5, 6-8, and 9-12) the school ultimately plans to serve.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 15

Applicant Evidence :



Appendix E - Daily an...

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Charter

10.2. Special Populations and "At-Risk" Students

Q145. 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 Scholars Academy will implement a process to ensure that we consistently identify, serve, and monitor students who need intervention. Our systematic intervention program is designed to stimulate early action that helps prevent academic failure and maximize the effectiveness of grade-level instruction. It is based on a framework of six key practices:

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

Within this systematic intervention framework, we will follow a three-tiered approach to support students identified as struggling and put them on the path to success.

- *Tier one*: Teachers will respond to student learning needs as part of regular classroom instruction. The school will develop written intervention plans based on insights from diagnostic assessments, teacher referrals, data from classroom and state assessments, and parent input. Students who have not yet demonstrated mastery will receive supplemental support in the classroom, and corrective approaches for these students will include re-teaching, cooperative learning opportunities, differentiated instructional strategies targeting individual students' needs, and use of learning centers and alternative materials.
- *Tier two*: If students do not master content in the first tier of intervention, we will base new, more prescriptive interventions on teacher referrals, data from classroom and end-of-instruction assessments, results from assessments tied to national norms, state assessment results, and parent input. Students will receive supplemental interventions using ideas that are proven to accelerate student learning. Other intervention strategies will sometimes be provided in classrooms in a workshop setting or delivered through supplemental support outside of the general education classroom during non-core educational programming. Our intervention professionals will monitor student progress frequently to ensure that intervention is effective and that classroom teachers and interventionists collaborate regularly.



- *Tier three:* If progress-monitoring data shows that a student is not making enough progress after Tier Two actions, Tier Three interventions will begin. The teacher, intervention staff, and the school leaders will regularly review current strategies, monitor student progress, and work together to monitor that student's learning patterns and progress. Tier Three interventions include an intensified approach focused on selected high-priority reading and math skills. One-on-one concentrated tutoring will also be considered whenever appropriate. If these interventions help the student reach appropriate levels of learning, the school will hold a referral meeting to decide if testing should be given to determine if the student has special needs.

Students previously on an intervention plan who score above the 25th percentile are eligible to be removed from the plan.

To accommodate the needs of our students, we will provide more specific instructional programming for at-promise students. At-promise students are those who have traditionally been labeled at-risk. The school will dedicate additional staff solely to providing Tier Two and Tier Three interventions, make plans for extended learning time, and increase learning intensity in specific areas to targeted student subgroups. This front-end investment may include:

- Intervention teachers and tutors to provide Tier Two and Tier Three interventions.
- An after-school blended-learning program and onsite summer learning.
- Bi-weekly monitoring to ensure that interventions are achieving their designed purpose.



Alysha Gray

Comments :

The plan provides a detailed outline of a tier process to meet the learning needs of students performing below grade level. It also includes progress monitoring and programs to be used throughout. How will the school address students suspected of a disability prior to the completion of the MTSS process?

Q146. 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, MLs, students identified as gifted, and students at risk of dropping out). If no founding board members have experience working with special populations, describe the school's pre-opening plan to prepare for special populations.



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



Alysha Gray

Comments :

The narrative mentions a partnership that will be beneficial to staff who are working with at risk students, however, there is no mention of anyone that had specific experience, including licensure required, in working with students with disabilities. What is the plan of the school to prepare for the enrollment of students with disabilities?

Q147.Explain how the instructional plan and curriculum will meet the needs of Multilingual Learners (ML), including the following:

1. Methods for identifying ML 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 ML students.
3. Plans for monitoring and evaluating the progress and success of ML students, including exiting students from ML services.
4. Means for providing qualified staffing for ML students.



Meeting the needs of Multilingual Learner (ML) students

Carolina Scholars Academy is committed to ensuring that ML students, or Multilingual Learners, have access to high-quality education and instruction. Given our intended search area, we anticipate serving an ML population similar to surrounding schools.

Carolina Scholars Academy will maintain a welcoming environment for multilingual families, including signs in various languages, dedicated parent and family events, celebrating holidays and cultures, and literacy training/support for parents/guardians. We believe all teachers are language teachers. Our ML program is designed to ensure that Multilingual Learners are equipped with the essential academic vocabulary, knowledge, and skills necessary for academic success, both within the school and beyond. Our core curriculum has been developed to include research-driven best practices for language acquisition, including Sheltered Instruction Observation Protocol (SIOP) strategies.

Identification and placement: The school will work with students and families to identify MLs through home language surveys and the WIDA Screener.

All new entrants will complete the Home Language Survey (HLS). If it is indicated on the questionnaire that a student's home language is English, then the screening process will be discontinued. If it is indicated on the HLS that the student's home language is not English, Carolina Scholars Academy will conduct an informal interview with the student in his/her native language and in English. If it is confirmed that the student is a potential ML, then the school will obtain previous ML records or the WIDA Screener.

If the student scores above 4.5 on the WIDA Screener, the screening process will be discontinued. If the student scores 4.5 or below on the WIDA Screener, then the student will be considered eligible for the school's ML program. All student information on home language and proficiency levels will be recorded in the school's student database and in the students' cumulative files.

During the screening process, ML staff will take appropriate action if the student has accommodations documented in an IEP or 504 Plan or if the student has had interrupted formal education.

The parent or guardian of a Multilingual Learner will be notified, in English and in their native language, of their child's eligibility for the ML program. Parents or guardians will also receive written notification, in their requested language, of the identification of their child as an ML student, the programs available to their child(ren), and their right to refuse such services. The school will make every effort to meet with the parents or other persons in parental relation to such ML students, at least twice a year, to help them understand the student's progress. Parents or guardians also receive communication about their student's Individualized Learning Plan outlining language goals for the year.

Instructional programs: We will implement an effective, research-based approach to accelerating English language acquisition for Multilingual Learners that includes Sheltered English Immersion (SEI)



in the general classroom, as well as specific language acquisition instruction called English Language Development (ELD). SEI is the vehicle for the acquisition of grade-level content, while ELD is driven by the need to increase proficiency in English and specifically the academic English necessary for success in school. Additionally, we will implement newcomer programming to help students new to the country acclimate to the school and community.

- SEI is the provision of an immersion environment, where all classroom instruction is delivered in English by the classroom teacher with an awareness of the unique characteristics and needs of Multilingual Learners, and additional realia, scaffolding, and background knowledge provided during the course of lessons. The hallmarks of effective teaching and learning, such as the nine instructional strategies in Classroom Instruction That Works, the formative assessment planning process, the NHA Curriculum, NHA's proven best practices, and differentiation to meet individual student needs, remain in an SEI classroom, with additional language supports in evidence. SEI is also referred to as Sheltered Instruction or SDAIE, Specifically Designed Academic Instruction in English. ML teachers will regularly collaborate and plan with core content teachers to implement ML scaffolds to allow students to access core content.
- ELD is focused on helping students acquire social and academic English. The SEI classroom enables access to the grade-level content, despite a lack of proficiency in English, while ELD is intended to dramatically increase the level of proficiency in the four domains of listening, speaking, reading, and writing. ELD combines "a) explicit teaching that helps students directly and efficiently learn features of the second language such as syntax, grammar, vocabulary, pronunciation, and norms of social usage and b) ample opportunities to use the second language in meaningful and motivating situations." Students that are provided with ELD in a separate block have been shown to have "modestly but significantly higher English oral language and literacy scores" as teachers focused on developing oral literacy in English. ELD should take place as a supplement to the defined ELA instruction, not in place of such instruction, and will frequently take place outside of the general education classroom, though not always. ELD is also referred to as English as a Second Language (ESL) or Teaching English to Speakers of Other Languages (TESOL).
- We will provide intensive support to newcomers to help them acquire social and instructional language to engage in core content. This will include using the student's first language as a foundational support towards English language development. Newcomers or recently-arrived ML students may have limited or interrupted formal education, and therefore have limited literacy in their home language. This program, along with the parent liaison, will endeavor to make the students and their families feel welcome at Carolina Scholars Academy.

Monitoring student achievement and exit criteria: Carolina Scholars Academy will track the academic achievement of multilingual learners and the progress they are making towards proficiency in English. The school will utilize multiple measures to track progress, such as Lexia data, classroom assignments, formative assessments, grade-level assessments, the Northwest Evaluation Association Measures of Academic Progress (NWEA MAP), North Carolina assessments, and the ACCESS for MLs. ML students will be required to participate in North Carolina's ELA, mathematics, science, and social studies tests that may be administered in English or an alternative language with approved ML accommodations.



Multilingual Learners who have recently arrived in the country will still participate in statewide assessments. However, their scores will take three years to be fully counted in the school's accountability metric.

For an ML student to exit the ML program, the student must score at the proficient level on the ACCESS assessment for MLs. Students will be monitored for four years after exiting the ML program. Family involvement, high expectations, and active learning techniques will continue to encourage individual students to achieve greater academic success after exiting the ML program. The academic success of ML students is a responsibility shared by all educators, the family, and the community.

Staffing and development: Carolina Scholars Academy will invest in resources that successfully close achievement gaps for multilingual learners.

All staff will receive professional development on strategies for working with Multilingual Learners and strategies to engage families of Multilingual Learners. This professional development will ensure that all staff members take ownership for the Multilingual Learners in the school and will be equipped with the necessary tools to meet their needs. All staff members will receive LETRS training, and will benefit from follow-up planning, coaching, and observations by collaboration between an ML specialist and English Language Arts specialist. We will include Multilingual Learners in all school classes and activities. Instructional materials for Multilingual Learners will be evaluated and selected based on the proven success of the tools in meeting the needs of similar populations of Multilingual Learners.

We will adjust staffing as necessary based on the enrollment of students. A member of the school administration (dean) will serve as our ML coordinator to coordinate ML data, schedules, and ensure that Multilingual Learners are not over-classified as students with special needs. This individual will evaluate the needs of the school to provide additional services and consultants as determined by the needs of Multilingual Learners in the school. An ML Specialist from NHA's Curriculum and Instruction Team will support the dean and teachers in further enhancing ML programming.

We are committed to ensuring that Multilingual Learners and their families are not excluded from curricular and extra-curricular activities due to an inability to fluently speak and understand the language of instruction, including any before- or after-school tutoring and summer learning programs. We will provide the parents or other persons in parental relation to Multilingual Learners school-related information in their preferred language when feasible.

All students identified as MLs will have an Individualized Learning Plan created that documents their level of proficiency in English (overall and in the domains of listening, speaking, reading, and writing), provides student-specific goals for each domain of language, and contains all accommodations/modifications to be utilized in classroom instruction and on assessments, as appropriate and allowable.

This plan will provide a common understanding of the needs of each Multilingual Learner for the



classroom teacher and ML staff. Additionally, the school will use the plan to coordinate between staff members on how to meet the needs of the student in language acquisition and academic achievement and to communicate progress or newly identified areas of need.

Q148. 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.**



Identifying and meeting the learning needs of intellectually gifted students

Students who possess exceptional gifts and talents should receive the direction, time, encouragement, and resources to maximize their potential. Carolina Scholars Academy will work with parents and students to identify gifted and talented students from all backgrounds, and to provide instruction that nurtures and fully grows that excellence.

For all students, we will use an assessment in reading and in mathematics that is referenced to national norms (potentially NWEA). To ensure continuing academic growth for each student, the school will be committed to thoroughly monitoring students' progress and adjusting learning opportunities when growth is inadequate, whether a student is performing below, at, or above grade-level proficiency. In addition to using the norm-based assessment results, classroom teachers will monitor mastery of curricular content, as measured through classroom assessments that are administered as part of the school's formative assessment program. The formative assessment program is a planned process by which teachers and students adjust their approaches to teaching and learning based on insights from frequent, varying, and ongoing evaluations of progress. This process will allow the school to identify students who are performing at the very highest levels, a potential indicator of a student's identification as gifted and talented.

Some NHA-partner schools have had a sufficient number of accelerated students in one grade level to allow the formation of a class cohort performing above grade-level proficiency and who are designated gifted and talented, allowing an entire student subgroup to move through the curriculum at a more rapid pace. This allows opportunities for larger groups of scholars to be systematically challenged with higher-order thinking skills and project-based learning within a common peer group, and the pairing of that unified section of students with a specially-qualified teacher. This arrangement will be considered at our school if the number of students identified as gifted and talented warrants.

If there is not a sufficient number of students in one grade level, students can participate in the EXCELERATE program. Differentiated curriculum can be provided to top-performing students who are ready to progress beyond grade level. This allows us to better meet the needs of more advanced students and provide the appropriate level of challenge and higher-level thinking.

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

10.3. 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.

Q149. 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.

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

When a new student enrolls, parents will be asked to indicate if their child has an IEP or Section 504 plan and to provide a copy of records. We will share any provided information with the dean overseeing special education, the classroom teacher, and the special education teacher. The registrar will request a copy of all school files, including special education and Section 504 records from the child's prior school. Upon receipt, the registrar will review all student files to determine if the student received special education or Section 504 support. If the student received special education or Section 504 support and these records were not provided by the parent or received in the student's cumulative file, then the registrar will immediately request the missing records from the student's prior school/district. School leaders and appropriate staff will then be notified of this information. Upon receipt of a student's current IEP or Section 504 plan, staff will complete the transfer process consistent with state and federal requirements. Comparable services, consistent with the received IEP or Section 504 plan, will be provided until the IEP or Section 504 plan is accepted or a new IEP or Section 504 plan is developed, consistent with state and federal requirements.

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



Alysha Gray

Comments :

An efficient process of identifying students that have previously been found to be eligible for special education services is established.

Q150. 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.



Since some students may come to Carolina Scholars Academy with no active IEP or identified disability, we will be responsible for identifying students who may need special education services under IDEA or Section 504, consistent with state and federal Child Find requirements.

Student identification

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

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

Avoiding misidentification

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

Evaluations and assessments

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



eligibility, identifying the student's needs, and developing an individualized educational plan to address the student's needs within the least restrictive environment. The provision of a free appropriate public education and all other applicable state and federal special education requirements will be followed.

The evaluation process is nondiscriminatory, and any written material will be in the family's native language. Tests must be validated, selected, and administered by certified or licensed personnel, consistent with the testing administration guidelines and in compliance with all state and federal requirements. Multiple measures will be used, and the evaluation will assess areas of educational need and the child's special education and related service needs.

Once the evaluation has been completed, the dean will schedule an IEP team meeting in consultation with the parent. The IEP team will review the results of the comprehensive evaluation and any additional relevant information provided by the parent and then determine eligibility for special education consistent with state and federal requirements (including rule-out factors).

Following the determination of special education eligibility, the IEP team will develop an IEP for the student. This plan will be designed to address the student's unique needs and satisfies the requirements of FAPE provided in the least restrictive environment.

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

Child Find requirements

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



Alysha Gray

Comments :

Processes described in narrative should include a 30 day response to notification to referrals.

Q151. 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)**

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

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

Record request, confidentiality, and compliance

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



Alysha Gray

Comments :

The plan does not provide clear information on Requesting records procedures, Records confidentiality and Record Compliance.

- Consider outlining a plan to do in-house audits of files. How will EC records compliance be handled on-site? How frequently will compliance reviews occur? Who will conduct the reviews? How will the record review process be used to improve services for students with disabilities?
- With confidentiality in mind, include mention of who has access to records which should be posted in the separate, locked room where records are stored. Explain the procedure for signing records in/out as needed. There would need to be mention that a sign in/out sheet would be included in each EC record. Recommended components include:
 - Chart to track students enrolling (student name, placement, records request/receipt of records)
 - Assurance of special education services on Day 1

Q152. 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 Scholars Academy will provide appropriate services and specially designed instruction for students with IEPs and Section 504 plans, allowing access to, and promoting progress in, the general education curriculum. We will serve *all* children according to their individual academic, functional, and social and emotional needs, providing a free and appropriate public education (FAPE) in the least restrictive environment (LRE) in accordance with state and federal requirements. Should our facility not accommodate the needs of a specific student, we will work to identify and support an opportunity that allows that student to both take part at Carolina Scholars Academy to the extent possible, as well as receive the necessary and vital services. Carolina Scholars Academy will assign a dean to oversee all EC programming.

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

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

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



maintained on file at the school.



Alysha Gray

Comments :

The plan does not provide a detailed approach to how the school will serve students with mild, moderate, or severe disabilities. How will Carolina Scholars ensure a full continuum of services for students with disabilities is provided without reliance on the local district or other external entity? Is the school prepared to ensure the IEP is followed, staffing is appropriately licensed, progress monitoring is being done, services are being provided, separate, resource, related and home-bound services are provided as indicated in IEP, etc.? The narrative does not include staffing considerations (including teachers and related service providers).

Q153. Describe the specific educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities. How will the school ensure students' access to the general education curriculum?

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

Instruction provided outside of the general education classroom will only take place when the nature and severity of the student's disability necessitates this model. A continuum of placement options will be available to support student placement decisions, if necessary, including consideration of placement in more restrictive settings operated by the local district or other external entity.

Related/ancillary services (speech, mental health, physical, and occupational therapy) will be provided and scheduled consistent with the student's IEP. These services will be provided by properly certified and licensed practitioners who will be employed or contracted by NHA or provided by the local school district or other affiliated agency.



Alysha Gray

Comments :

The plan does not provide a detailed approach to how the school will serve students with mild, moderate, or severe disabilities. How will Carolina Scholars ensure a full continuum of services for students with disabilities is provided without reliance on the local district or other external entity? Is the school prepared to ensure the IEP is followed, staffing is appropriately licensed, progress monitoring is being done, services are being provided, separate, resource, related and home-bound services are provided as indicated in IEP, etc.? The narrative does not include staffing considerations (including teachers and related service providers).

Q154. Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).

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



Alysha Gray

Comments :

The narrative should include details of methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE). Some methods of support could include:

- specific training regarding specially designed instruction,
- plans for a high level of family engagement,
- consideration of extended school year services,
- development and implementation of behavior support plans,
- progress monitoring of IEP goals,
- proper use of assistive technology,
- related services,

How will the school ensure students receive needed services on their IEP on Day 1 of school?

Q155. Describe how implementation of the Individualized Education Plan (IEP) will be



monitored and reported to the student, parents, and relevant staff.



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

IEP monitoring

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

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

Special education providers will also use curriculum-based assessments and other progress-monitoring data collection tools to monitor progress on IEP goals and objectives.

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

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



IEP reporting

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



Alysha Gray

Comments :

The school provides a clear explanation on how the implementation of the IEP will be monitored and communicated with parents.

Q156. Describe the proposed plan for providing related services and to have qualified staffing adequate for the anticipated special needs population.

Carolina Scholars Academy will hire teachers certified in special education to ensure high-quality instruction for students with special needs consistent with North Carolina state requirements. Staff credentials will be reviewed to ensure compliance with the certified teacher requirements. Related service staff will have state-required credentials before providing services to eligible students.

All new staff, including special education teachers and support/itinerant staff, will join a new staff orientation session before the start of the school year to learn the school's mission and special education practices and procedures. Special education staff will receive additional professional development during professional development days and special education staff meetings, at regional/state conferences, and in weekly one-on-one meetings with the dean overseeing special education.

Special education teachers and special education paraprofessionals will be on staff in our first year to support students with IEPs. The school also will have ancillary staff, such as a social worker, speech therapist, occupational therapist, physical therapist, and mental health provider, either on staff or through a contract. Additional special education staff will be added based on student need and growth in the special education student population, consistent with state or local district caseload requirements.



Alysha Gray

Comments :

The plan provides an explanation as to how the school will provide adequate staffing to serve students with disabilities as well as contracting/hiring related service providers. How will the school ensure the needed licensure requirements are upheld by the contracting entity?

10.4. Student Performance Standards

Q157. Describe the student performance standards for the school as a whole.

We will use measures of academic growth and proficiency beyond those required by state law, and our school will share similar goals with other NHA-partner schools in North Carolina and elsewhere. Further, we will treat our goals as starting points, foundations of success that we will strive to surpass.

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

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

Our academic goals look at proficiency, course completion, and growth and will include comparisons to neighboring district schools and state and national averages. We will prioritize local comparisons because they help us ensure that we offer families a strong choice. Families' choices typically involve weighing specific individual school buildings in their own communities; as they make decisions about their children's education, they seldom make comparisons to statewide average scores or even averages of entire districts. At the same time, we will value and use state and national averages to help measure our success because they provide a broader measure of our overall performance. Our goals are specific, measurable, ambitious, attainable, relevant to our mission, and time-specific. Each goal focuses on a specific assessment and assessment period, and each is designed to encourage consistent improvement and achievement in student learning.

Q158. 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 Scholars Academy will regularly assess the efficacy of teaching and the quality of learning by utilizing an array of assessments that measure the progress of all students who enroll with us. NHA will work with staff to ensure these measures are offering sufficient alignment.

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

Use of assessment data

Our key assessments will include:

- *Formative assessments:* Carolina Scholars Academy will administer formative assessments to provide important benchmark data on student growth.
- *Interim assessments:* We will administer interim assessments two or three times per year to give deans and teachers long-term snapshots of students' learning and preparation for end-of-year state assessments. These interim assessments have been designed by NHA to align with the North Carolina Standard Course of Study and are highly predictive of proficiency on the state assessment.
- *Unit tests:* Teachers will administer unit tests in specific subjects after completing instruction in that area of learning. Students who score poorly will be re-taught and re-tested.
- *Quizzes:* Teachers will challenge students with quizzes at the end of each week to take a quick snapshot of student learning covered that week. Data from these quizzes, which are also closely aligned with state standards, are analyzed in real time so teachers know whether and how they must modify instruction. In fact, at NHA-partner schools, it is common for instructional professionals to modify teaching plans within a day of receiving quiz results.
- *Exit tickets:* On any day, teachers may give an exit-ticket assessment based on the standard that was the focus of that day's lessons. Because our instructional plans are driven precisely by standards, a simple roomful of thumbs up or down will offer teachers valuable, aligned, and actionable feedback.

Common assessments

NHA has developed common assessments in both English language arts and mathematics. Common assessments align closely with instructional objectives, are easy to administer, provide automated scoring, document student progress, and show when new support is needed to ensure appropriate progress. Curriculum-based and interim assessments provide common data to show student progress.

Assessment professional development



As part of our commitment to data driven instruction, we will prioritize professional development designed to help teachers improve their skills analyzing data for insights and applying those insights to instructional planning and delivery. This professional development commitment reflects a simple insight: The best possible data on academic outcomes is of no value if teachers do not use it to improve instruction. NHA's new teacher summit, an intensive week-long summer session for all teachers who are new to NHA-partner schools, as well as NHA's regional professional development events for educators at several of its partner schools and Carolina Scholars Academy's own in-school sessions, will all focus frequently and intentionally on understanding assessment data and using insights from that data to refine and improve instruction.

We are fully committed to data driven instruction because we know data from assessments in October, in March, and at any time during the school year offers predictive value on likely outcomes at the end of the school year. More importantly, this data gives us opportunities to modify instructional strategies if such changes are needed.

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

Q159. Explain the policies and standards for promoting students, including students with special needs, from one grade level to the next. Discuss how and when promotion criteria will be communicated to parents and students.

As noted in Question 132, our principal will be authorized to make initial grade placement of students and will have the final decision with regard to promotion, acceleration, and retention of students. A student is expected to progress through one grade each year. On occasion, it may be in a student's best interest to accelerate him or her more than one grade or retain him or her to repeat a current grade. These criteria will be shared with families in our parent and student handbook.

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



Alysha Gray

Comments :

Information in this section includes consideration of students with special needs. IEP progress and other factors not including social and emotional abilities should be also be considered for promotion and retention.

Q160. Provide the public charter school's exit standards for graduating ALL students. These standards should set forth what students in the last grade served will know and be able to do. Be sure to include plans for students at risk of dropping out.

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

10.5. School Culture and Discipline

Q161. 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 Scholars Academy will implement an educational program that centers around four pillars: *academic excellence, student responsibility, parental partnerships, and moral focus*. These pillars are also a major component of NHA's comprehensive model, and our mutual commitment to them will allow us to provide a high-quality choice from day one.

We believe we can most successfully achieve our mission, prepare students for college- and career-readiness, and meet the needs of all students by creating a culture that encourages family involvement. It will be a priority to communicate this important aspect to build our culture from day one. School staff will also be hired in alignment with this culture and professional development prior to the start of the school year will build and enhance our culture.

We embrace the idea that student learning is an adult responsibility, and that this value requires our school staff to teach to students' hearts as well as their minds. This includes implementing an educational program around our four pillars that embodies the recognition that every student can learn at a high level. Our culture will rely on the teaching methods and key differentiating educational features discussed earlier in this application, especially the school-wide and classroom frameworks.

We believe time spend on disciplining students is time not invested in student learning. Our philosophy behind our discipline policy is to build and foster a culture committing to individual student achievement. We will enact, implement, and sustain a program called Behave with Care (in place at other NHA-partner schools and outlined below in Question 163). Teachers and school staff will reinforce positive behavior through relationship building, classroom motivation systems, development of social contracts, precise praise of positive behavior, and individual student affirmations.

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

Q162. 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 Scholars Academy will be available for all students and we will welcome them whenever they choose to enroll so long as a seat is available. Our school will host numerous meetings before the beginning of school in order to start building the desired culture for families and the community. We intend to advertise broadly and share our mission and vision. We understand student learning to be a shared adult responsibility. In turn, we plan to begin our school culture with our school leaders and school staff. We plan to hire a principal who believes all children can learn at a high level and who will drive this across our school community. Carolina Scholars Academy staff will invest time as a team in professional development prior to the start of school in order to learn systems, processes, and foster culture.

As mentioned above, Carolina Scholars Academy will implement an educational program that centers around our four pillars. We believe we can most successfully achieve our mission, prepare students for college- and career-readiness, and meet the needs of all students by creating a culture that encourages family involvement. It will be a priority to communicate this important aspect to build our culture from day one. School staff will also be hired in alignment with this culture and professional development prior to the start of the school year will build and enhance our culture.

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

Q163. Provide a brief narrative that delineates how student conduct will be governed at the proposed charter school and how this plan aligns with the overall mission and proposed Education Plan of the charter school. Be sure to include:

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



We believe time spent on student discipline is time not spent on student learning. The philosophy behind the discipline policy is to create and maintain a culture that commits to individual student achievement. We will adopt, implement, and sustain a program called Behave with Care, which includes school-wide behavior and classroom management practices, is rooted in the concept of engagement, and is aligned with the U.S. Department of Education's Positive Behavioral Interventions and Support (PBIS) model. Behave with Care includes a six-level color-coded, school-wide behavior management system to ensure that positive behaviors are reinforced. Teachers and staff will consistently reinforce positive behavior using strategies such as relationship building, classroom motivation systems, development of social contracts, precise praise of positive behavior, and individual student affirmations.

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

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

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

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



Alysha Gray

Comments :

The narrative lacks an detailed explanation of how the school will take into account the rights of students with disabilities in regard to these actions that may result in suspension or expulsion of students. How will the school take into account the rights of students with disabilities when dealing with behaviors that may lead to a suspension or expulsion?

10.6. Certify

Q164. **This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.**

Yes

No

Q165. **Explanation (optional):**

Our Board has thoroughly examined and discussed this proposal, and has voted to approve its submission. Our Board recognizes that numerous elements of the practices, procedures, and systems outlined in this application are currently implemented at existing NHA-partner schools. As a result, considerable portions of the language in our application bear similarities to applications submitted in previous years.

Section



Alysha Gray

Ratings

**Meets the
Standard**

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

Comments :

While the response addresses several key criteria, it provides insufficient detail regarding accommodations and support for students with disabilities. Additional information is needed to fully meet the review requirements.



11. Governance and Capacity

11.1. School Governing Body

Q166. Organization Street Address (if you have one)

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

5488 U.S. 401 N, Louisburg, NC 27549


11.2. 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.


Q167. 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 th...

Applicant Evidence :


Carolina Scholars Ac...

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Charter

Q168. 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.



Our governing Board is made up of six members. Resumes for each member of the governing Board are included in Appendix H. Our role will be one of governance, closely ensuring our school is on track to meet the goals within our charter contract. This will involve reviewing academic, operational, and financial data for our school and directing change appropriately. We will delegate to NHA the daily operations for Carolina Scholars Academy, confident in its ability to deliver the educational program we propose within this application. We have engaged independent legal counsel, as well as an independent auditor. These resources will provide us with guidance regarding legal decisions and the state of our school's finances. Intermittently, we may contract with a third-party for an evaluation of the performance of NHA.

Our Board will perform functions including but not limited to:

- Articulating, maintaining, and driving our mission and vision throughout the school community.
- Holding NHA accountable for the efficient and effective operation of the school and for the achievement of academic goals.
- Reviewing and approving the school's annual budgets and ensuring that proper financial procedures are in place and effectively implemented.
- Reviewing, approving, and monitoring progress toward academic, financial, and operational goals.
- Reviewing and approving school policies.
- Ensuring that sufficient enrichment programs are created to supplement the education program.
- Appointing officers and committees as needed.
- Adopting, amending, and repealing bylaws as needed.
- Developing and maintaining effective relations with the NCDPI and the Office of Charter Schools.
- Ensuring that meetings are conducted in accordance with open door laws and in compliance with North Carolina conflict of interest and public records laws.

The principal, with NHA as appropriate, will provide us with the information needed to assess all aspects of the school's performance in a comprehensive and timely manner.

It is our obligation as the governing Board of Carolina Scholars Academy, to hold NHA accountable to deliver us a successful school. NHA's longstanding success provide us with confidence in achieving our mission and goals. We will partner to meet the needs of families who entrust us with their students. Our Board will enact policies that provide necessary transparency into our governance, NHA, and Carolina Scholars Academy.

Roles and responsibilities

Our Board will consist of a President, Vice President, Secretary, and Treasurer as voted. Roles and responsibilities of each officer include:

- *President:* The Board President chairs our Board meetings, ensures we utilize Robert's Rules of Order, works with NHA to set the agenda, is the Board's primary contact for the school principal and our Board's independent legal counsel, and signs contracts on our Board's behalf.
- *Vice President:* The Vice President assumes the President role and responsibilities in the event of an



absence, or as assigned.

- *Secretary:* The Secretary signs our Board's approved meeting minutes, executes contracts when two signatures are required, and ensures that proper protocol is followed in terms of capturing what takes place at each meeting.
- *Treasurer:* The Treasurer interprets and clarifies the school budget for the rest of the Board and presents the budget as prepared.
- *Director:* All Directors understand and adhere to North Carolina open meetings laws, read, understand, and abide by the school bylaws and policies, and attend meetings having read the Board materials ready to discuss all items. Directors also recruit new Board members and provide financial oversight and budget approval.

Lead administrator

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

We will require our principal and NHA to provide the Board with regular reports on student performance, assessment data, operational data, and any parent survey data. We will use this information to assess the school's progress towards our performance goals and the performance of the principal. We also may contract for an independent evaluation of NHA to evaluate how well NHA and the school leadership are meeting expectations. Under the provisions of our services agreement with NHA, our Board maintains the authority to express reasonable dissatisfaction with the principal. If NHA and the principal have been given sufficient time and support to remedy an issue and there has been insufficient improvement, the Board can direct NHA to terminate the principal regardless of the individual's personal connection to the development of the school.



Q169. Describe the size, current and desired composition, powers, and duties of the governing board.

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

Our governing Board is ultimately responsible for the success of Carolina Scholars Academy. In order to achieve our mission, vision, and goals, we must make decisions in the best interests of our students and families. Our board will focus on overseeing the operational, financial, and academic components of our school. We will hold NHA accountable and direct change appropriately. Carolina Scholars Academy will benefit from NHA's system of supports that covers a multitude of functions designed to allow school staff to focus on students. We are confident in the organization's ability to provide us the desired educational program outlined within our proposal.

Q170. 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.

Our Board Chair, Tykayla Livingston, assembled our Board following a recognition of need for additional educational choice in Franklin County. As an early child educator and parent, she realized that students were not taking ownership of their own education. She connected with members of the Franklin County Board of Education who encouraged her to look into charter schools. Ms. Livingston joined the Board of Wake Forest Charter Academy, where she saw an opportunity to partner with NHA to provide a high-quality educational option to students in Franklin County.

She recruited other members of our Board, bringing together individuals with a passion for student education and backgrounds that include experience in education, curriculum direction, public administration, organizational leadership, community engagement, and more. Our Board also contains members with experience founding charter schools, serving on charter school Boards, working at charter schools, and serving in a school finance Board member role. As parents, members of our Board understand the needs of students in Franklin County and that we are responsible for our school's academic, operational, and financial success. We will partner with NHA to deliver in these areas and will ensure they are held accountable to do so.

Q171. 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.**



Our Board is composed of members with strong roots within our community, as well as with successful charter schools. Our backgrounds rooted in education, curriculum direction, public administration, organizational leadership, community leadership, and more demonstrate that our team possesses the broad skill set needed to assess the needs of our community and ensure that our school embodies its vision of being a vibrant institution. Our local ties help us relate to families and organizations in the community.

Evaluation of the school and school leader

The Board will hold our principal accountable, along with NHA, for the school's performance. We will require our principal and NHA to provide the Board with regular reports on student performance, assessment data, operational data, and any parent survey data. We will use this information to assess the school's progress towards our performance goals and the performance of the principal. We also may contract for an independent evaluation of NHA to evaluate how well NHA and the school leadership are meeting expectations. Under the provisions of our services agreement with NHA, our Board maintains the authority to express reasonable dissatisfaction with the principal. If NHA and the principal have been given sufficient time and support to remedy an issue and there has been insufficient improvement, the Board can direct NHA to terminate the principal regardless of the individual's personal connection to the development of the school.

Additionally, our contract with NHA allows us to terminate the entire partnership at any time if we decide that is in the best interest of the school. Should we opt to terminate the agreement with NHA, we retain the right to lease the school building for the remainder of the current school year, as well as for one additional school year. Importantly, the per-pupil funding will continue to flow to us to fund school operations independently. This allows us to transition management to another company or to become more of an operational board and contract for the individual services we need.

Educational and operational success

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

Involvement of key stakeholders

Our meetings will be open to the public. We invite parents to participate in our meetings. We will seek feedback from parents, in addition to community organizations, recognizing that they are critical to



the success of our school. We will welcome any community partner with meaningful feedback to share with our Board. Our intention is to maintain a membership on our Board where each individual is passionate about the success of our students.

Q172. Explain the procedure by which the founding board members have been recruited and selected. If a position is vacant, how and on what timeline will new members be recruited and added to the board?

Our Board Chair, Tykayla Livingston, recruited and selected members of the Carolina Scholars Academy Board of Directors. She lives in Franklin County and is extensively involved, including as a member of the Down Home NC (Franklin County Chapter). Her background as an early childhood educator and parent allows her insight into the needs of students in Franklin County. Additionally, Ms. Livingston has conducted extensive research regarding the necessity of a public charter school in the area. Her experience as a Board member at Wake Forest Charter Academy, an NHA-partner school located in Wake Forest, has provided great insight into the characteristics that make up a successful governing Board. To recruit Board members, Ms. Livingston reached out to others who share her passion for meeting the needs of families in the Franklin County community and who share her belief in school choice to form the founding Board of Carolina Scholars Academy.

Our Board will have staggered terms of office to ensure continuity as we open our school and expand membership. We seek to anticipate vacancies to the greatest extent possible, asking members to notify the Board President early in the year of their term expiration if they do not wish to renew their term. We will maintain a list of contacts and associates whom we want to ask to serve on the Board or who have expressed an interest in doing so, referring to this list whenever a vacancy may occur.

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

Q173. Describe the group's ties to and/or knowledge of the target community.



Our Board has strong ties to the Franklin County community. Our Board Chair, Tykayla Livingston has grown up in Franklin County and has done extensive research on our target community. She works in the area and has seen firsthand the need for increased educational choice in the area. She is also deeply involved in organizations such as Down Home NC (Franklin County Chapter). Ms. Jefferson-Lewis has served as a Franklin County Schools teacher for over 13 years.

Board members who live outside of the area maintain strong knowledge of the community we seek to serve. Together with our Board Chair, Mr. Traynham, Ms. Brooks, Ms. Gaffney, and Ms. Mills-Wilson have done work to understand growing areas in our community and the expected populations we hope to serve. By better understanding these populations, we can ensure we meet the needs of all students who enroll with us from day one. Our Board's unique experiences and backgrounds will provide the diverse perspectives our school will need to better serve our intended community.

Q174. Outline the strategic board calendar detailing how often the board will meet according to the bylaws established.

Our Board has planned for monthly meetings. If necessary, this schedule may be modified to ensure Carolina Scholars Academy is prepared to accept students on our first day of school. This may require additional meetings.

Q175. 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.

Board members will benefit from training and development to ensure that we govern the school effectively and fulfill our mission. We will offer all Board members training as needed to ensure Board effectiveness. This will include opportunities to use Board funds to support attendance at the National Charter Schools Conference, the annual conference and opportunities offered by the North Carolina Coalition of Charter Schools, and NHA's annual Board symposiums.

In addition, to support Board members' ongoing professional development, our Board will have access to a detailed suite of on-line learning modules maintained by NHA. These training assets help Board members understand a wide range of topics, including Board member roles and responsibilities; Board procedures; authorizer roles and responsibilities; the services and lease agreements; Board bylaws; executive sessions; public comment at Board meetings; and academic, operational, and financial data. Our staggered Board terms will allow new Board members to benefit from the experience current Board members are able to share. Additionally, we will seek support and advice on governance training from national and local sources, our own legal counsel, and our own professional resources.



Q176. 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.

Our Board will govern the school with an unwavering commitment to ethical practices. Pursuant to our bylaws, a Board member shall inform the Board of any actual or apparent conflict of interest with regard to any transaction contemplated by the Board. Conflicts of interest include transactions in which a member of the Board has a material financial interest, or with which the member is presently serving as a director, trustee, officer, or general partner of another party. The transaction may be approved only by a vote of the majority of Board members who have no conflict of interest. Also, as noted throughout our proposal, our Board members have completed background checks to identify any outstanding matters.

Existing conflicts of interest

There are no known existing relationships of founding Board members that could pose an actual or perceived conflict of interest if this charter school application is approved.

Avoiding actual and perceived conflicts

The Board will consult our legal counsel should any real or apparent conflict of interest ever arise. Our legal counsel will also provide support and advice as we review transactions for any actual and perceived conflicts of interest.

Q177. Explain the decision-making processes the board will use to develop school policies.



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

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

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

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

Q178. Describe any advisory bodies, councils, or associations listed in the organization chart or to be formed, including the roles and duties of that body, and the reporting structure as it relates to the school's governing body and leadership.



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

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

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

Q179. Discuss the school's grievance process for parents and staff members.



Parent grievances

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

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

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

Employee grievances

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

Carolina Scholars Academy's working environment allows school leadership to make decisions sensitive to the demands of students. We will structure staff, and also restructure, based on skill and performance to best meet student needs. Staff will serve our school on an at-will basis and, under our partnership arrangement, teachers will be employed by NHA. It is our belief that school leaders should have the ability to identify/support and terminate ineffective staff, as necessary. Policies and




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

Q180. 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 - Organiz...


Uploaded on **4/23/2025**
by **Franklin County**
Charter

Q181. 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


2024 Charter School ...



Applicant Evidence :



Appendix H - Board ...

Uploaded on **4/23/2025**
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Charter

Q182. 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: 40 Total Files Count: 50

Resources



2024 Charter School ...

Applicant Evidence :



Appendix I - Backgro...

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Charter

Q183. 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 Evidence :


Appendix J - Propose...


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Charter

Q184. Attach Appendix K Articles of Incorporation or Municipal Charter

- If the applicant is a non-profit board of directors, attach a copy of the articles of incorporation from the NC Department of the Secretary of State.
- If the applicant is a municipality, attach a copy of the municipal charter.

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

Applicant Evidence :


Appendix K - Articles ...

Uploaded on **4/23/2025**
by **Franklin County**
Charter

11.3. Staffing Plans, Hiring, and Management

Q185. 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 Templ...

Applicant Evidence :



Carolina Scholars Ac...

Uploaded on **4/23/2025**

by **Franklin County**

Charter

Q186. **Staffing Plans, Hiring, and Management** Explain the board's strategy for recruiting and retaining high-performing teachers.



The school's teacher-recruitment efforts will benefit from NHA's extensive teacher candidate network and proven recruitment capabilities. NHA currently works to staff 100 partner schools across nine different states. Its team of hiring professionals will work with our Board to leverage local knowledge and connections for an even greater level of support. NHA's recruiting strategies include the following:

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

NHA's dedicated recruitment and hiring team studies current trends regarding supply and demand for teaching staff. The team has spent time exploring Franklin County to anticipate and understand existing and potential hiring needs.

NHA's organizational design has put in place the necessary systems and procedures to prepare, develop, motivate, engage, reward, and ultimately retain school staff. Carolina Scholars Academy will implement a "Total Rewards" compensation model to provide staff with both a desirable benefits package and chance to earn additional compensation for supporting other student learning programs. Included within our proposed budget is teacher pay above market for openings that can be hard to fill (e.g.: Exceptional Children and ML teachers). Our health plan offerings are competitive, with low employee-cost options, retirement choices (including an employer-match), life insurance, tuition reimbursement, and employee acknowledgement and reward programs.

Additionally, a robust program of professional development, both required and optional, will ensure that teachers are able to learn and grow while at the school, enhancing the ability of the school to retain the best educators year after year.

Q187.If already identified, describe the principal/head of school candidate and explain why this individual is well-qualified to lead the proposed school in achieving its mission. Provide specific evidence that demonstrates the capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that (s)he has completed or is currently participating in.



If no candidate has been identified, provide the job description or qualifications, and discuss the timeline, criteria, and recruiting/selection process for hiring the school leader.

The founding principal of Carolina Scholars Academy has not yet been identified. We intend to seek a candidate who embraces and believes in the mission and vision in place for our school. This will be the foundation upon which we partner with the school's principal to establish our desired climate and culture. Our Board, in partnership with NHA, intends to identify a school principal by January 2027.

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

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

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

Q188.If the school leader has been identified, attach the school leader's one-page resume as Appendix O.

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

Applicant Comments :

We have not yet identified a school leader.

Q189.Provide a description of the relationship that will exist between the charter school employees and the school's board of directors.



The services agreement in place with NHA clearly defines the relationship between school employees and NHA (Article VIII of the agreement, included as Appendix A4.1). Carolina Scholars Academy's teaching staff will serve our school on an at-will basis and, under our partnership arrangement, teachers will be employed by NHA. Our school leaders will work with NHA to staff the school in accordance with expertise, strengths, performance, and how to best meet the needs of students who enroll with us. Our Board's independent legal counsel has reviewed and offered feedback on this arrangement and has determined it to be beneficial for our students. We will work closely with NHA to make sure our school has the best possible staff to achieve Carolina Scholars Academy's goals, mission, and vision.

Through our services agreement with NHA, our partner is responsible to attract, recruit, screen, and hire successful teaching candidates. Our school leaders will work with NHA to staff the school in accordance with expertise, strengths, performance, and how to best meet the needs of students who enroll with us. Our Board will maintain the authority to disagree with our principal, and we will allow NHA and the principal sufficient time and support to resolve any named issues. Our Board also retains the authority to direct NHA to terminate the principal if we do not realize results of these efforts.

NHA's comprehensive benefits package, competitive salary structure, and quality retirement plan will serve to attract excellent educators. Additionally, our school will benefit from NHA's substantial and professional teacher recruitment efforts and its 100-school network to find the right staff for our school. Our Board will plan to visit other NHA-partner schools in the area, and potentially spend time speaking with Board members of those schools.

Q190. Outline the board's procedures for hiring and dismissing school personnel, including conducting criminal background checks.



Hiring school personnel

As an initial step in the hiring process, each candidate will be evaluated to determine if the candidate is qualified and certified for the role as defined in state law and applicable federal requirements. We will conduct national criminal background checks on each candidate we wish to hire, as directed by our school's background check policy and as required by law.

In the spring before the school opens, top candidates for each teaching position will be sent to the principal for further evaluation and selection. Once a candidate is selected by the school leadership team and final referencing and criminal background checks are in place, the candidate will receive a start date and orientation instructions. We aim to have all positions filled in time to ensure attendance at the New Teacher Orientation professional development session in late July.

In partnership with NHA, our school will be an equal opportunity employer. We will leverage NHA's expertise in managing the licensure and compliance functions for our school.

Dismissing personnel

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

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

Q191. Outline the school's proposed salary range and employment benefits for all levels of employment.



Carolina Scholars Academy will operate under a market and performance-based compensation philosophy and endorses and will use the “Total Rewards” structure offered by NHA to its partner schools. This approach rewards administrators, faculty, and staff who have the greatest impact on student learning and achievement. The Total Rewards approach uses and evaluates all aspects of staff compensation (base pay, incentive pay, recognition programs, benefit design, tuition programs, etc.) to help recruit staff, invest in them, and encourage and reward behaviors that are proven to enhance student learning.

Our market-based pay and “pay for performance” philosophy rewards outcomes. We measure student academic growth and proficiency robustly and hold staff accountable for success. Staff will be evaluated and rewarded based on the accomplishments of the school. Teachers and deans will be evaluated on the academic performance of students in the classrooms over which they have responsibility. As part of the annual review process, base salaries or hourly wages for administrators, faculty, and staff will be evaluated and modified based on these individuals' accomplishments. Our administrators will also be empowered to identify struggling and ineffective staff and arrange for additional support services as appropriate (or, if additional training and supports are determined unlikely to develop the staff member to where he or she needs to be to ensure the success of the school, to terminate that employee). The working environment allows administrators to make decisions sensitive to the demands of students.

Components of the Total Rewards structure include the following:

- *Base pay (salary):* Teacher salary guidelines will be implemented that differentiate pay based on years of experience and performance. A non-scheduled approach to salary will be used to provide the greatest flexibility to meet specific school needs. Starting salaries typically are based upon research into the local market for teachers. Benefits include an emphasis on career progression with the support necessary to grow professionally, a respectful and professional working environment, a generous benefits package, and an unrelenting focus on achieving excellence. Increases in base compensation for employees will be recommended by the school principal and approved by NHA's Director of School Quality to ensure that high levels of student learning are being appropriately rewarded.
- *Incentive pay and additional compensation:* An incentive bonus plan will exist for the principal. Teachers will be eligible to earn additional compensation for supporting other student learning programs such as tutoring, mentoring new teachers, coaching sports, and/or working on special curriculum projects.
- *Health, dental, and vision benefits:* NHA believes in choice for employees when it comes to selecting a benefits package. As such, NHA offers two different health benefit plans and two different dental plans so employees can choose what is best for them and their family. NHA offers two different high deductible health plan options with a health savings account (HSA). The HSA options allow employees to plan for their current health coverage needs while also planning for their future needs because they can set money aside for future use. One of the dental plans is a basic coverage plan, and the second plan offers higher coverage for those with more in-depth dental needs. Premiums for NHA's benefits



plans are market competitive and benchmarked every year to ensure NHA offers affordable options. Eligible employees will receive an exceptional combination of medical, dental, and vision insurance at a very low cost, typically with low or no co-pays and deductibles (nearly 85 percent of all medical and dental expenses incurred by employees or their families currently are covered at NHA-partner schools).

- *Health/flexible spending account:* Employees may open a health spending account to set aside a portion of earnings to pay for certain qualified expenses.
- *Retirement savings:* Staff will be offered a 401(k) retirement plan with an employer match of 50 percent of the first 6 percent of compensation contributed to the plan and immediate vesting.
- *Life insurance:* Full-time employees will receive basic life and accidental death and dismemberment (AD&D) insurance that equates to their annual salary. NHA also offers optional group term life insurance for employees and eligible dependents, such as spouses and children. Employees will pay for any optional life insurance they choose.
- *Pay for time away:* Short- and long-term disability insurance will be provided after one year.
- *Employee Assistance Program:* An Employee Assistance Program, available at no cost to the employee, will provide free confidential counseling, legal advice, and financial advice to employees and their family members.
- *Tuition reimbursement:* Full-time and part-time employees will be eligible for tuition reimbursement for courses taken toward a job-related degree or continuing education credits.
- *Educator discounts:* A list of discounts that are available to educators will be researched, compiled, published, and made available to each employee.
- *Recognition programs:* Employees are encouraged to achieve high performance and will be provided encouragement through recognition programs, such as the annual NHA “Excellence in Teaching” award, Motivosity reward program, peer-to-peer recognition program, and service awards. In addition, NHA will provide special recognition to employees during American Education Week, Administrator Appreciation Week, Administrative Professionals Week, Teacher Appreciation Week, and Charter Schools Week.

Q192. Provide the procedures for handling employee grievances and/or termination.



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

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

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

Q193. Identify any positions that will have dual responsibilities and the funding source for each position.

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

Q194. 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 Scholars Academy will aim to hire teachers certified in special education to ensure high-quality instruction for students with special needs consistent with North Carolina state requirements. Staff credentials will be reviewed to ensure compliance with the certified teacher requirements. Related service staff will have state-required credentials before providing services to eligible students.

The school also will have ancillary staff, such as a social worker, speech therapist, occupational therapist, physical therapist, and mental health provider, either on staff or through a contract. These team members will meet the needs of every student who chooses to enroll with Carolina Scholars Academy. Additional staff for EC, ML, and gifted students will be added based on student need and growth, consistent with state or local district caseload requirements.

Included in our first-year proposed budget is funding for full-time equivalent (FTE) staff to meet the needs of Exceptional Children and Multilingual Learners. Once our school is fully enrolled, we anticipate having 4.0 FTE EC teachers, 6.13 FTE interventionists and teacher assistants, and 0.8 FTE social worker. We also anticipate opening with and maintaining 1.0 FTE ML teacher and will adjust as student needs require.

All new staff, including special education teachers and support/itinerant staff, will join a new staff orientation session before the start of the school year to learn the school's mission, special education, and Multilingual Learner practices and procedures. Special education and ML staff will receive additional professional development during professional development days, staff meetings, at regional/state conferences, and in weekly one-on-one meetings with deans. Our budget accounts for the staff described in this section and all professional development sessions they will receive.

Q195. 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).



Carolina Scholars Academy's teaching staff will serve our school on an at-will basis and, under our partnership arrangement, teachers will be employed by NHA.

Principal

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

Deans

Carolina Scholars Academy's deans will share administrative duties with our principal. These team members will be responsible for:

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

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

Teachers

Teachers will possess the ability to:

- Communicate/work effectively with parents and families;
- Adjust teaching style and pace according to students' specific needs;
- Modify according to differences/changes in traits of students, programs, leadership, staff, and our community;
- Implement varied teaching methodologies to meet students' personalized learning styles;
- Analyze tests/measurements of achievement; and (but not limited to),



- Work effectively as a member of our team.

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

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

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

11.4. Staff Evaluations and Professional Development

Q196. Identify the positions responsible for maintaining teacher license requirements and professional development.

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

Q197. Provide a detailed plan noting how the school will mentor, retain and evaluate staff in a format that matches the school's mission and educational program. The plan should also describe how the school will meet the teacher certification and licensure requirements for teachers as prescribed by state and federal law. Be sure this overview matches with the projected staff and funding of the proposed budget section.



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

Mentor

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

Retain

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

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

Evaluate

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

The measures described above will include the classroom framework described earlier in the application, as well as:

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

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



and form the basis for teacher evaluations.

Q198. 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.



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

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

Through our partnership with NHA, teachers at Carolina Scholars Academy will have access to a wide variety of learning opportunities. These opportunities include video libraries, conferences, virtual learning, web-based resources, and dedicated curriculum and instruction specialists.

Distributed leadership model's ongoing professional development: Our commitment to distributed leadership – for which our shorthand is the “dean model” – will see our principal and deans offering teachers dramatically more observation, coaching, and feedback than teachers in other schools typically receive. Deans schedule weekly one-on-one meetings (O3s) with all teachers to review lesson plans and give strategies, based on deans’ classroom observations, on how each teacher can improve instruction. In this process, deans offer important feedback, coaching, and encouragement, help teachers analyze data on student performance, and, when necessary and appropriate, model the approach to instruction they want teachers to learn and emulate.

Ongoing in-school professional development: After our new teacher summit (NTS), summer professional development will continue in the school, where the principal and deans will design and deliver sessions for all teachers focused on the school’s needs, goals, and community culture.

Regional professional development: Professional development will continue during the school year with two regional professional development sessions for teachers at Carolina Scholars Academy and other NHA-partner schools. These sessions will reinforce material from earlier development sessions while adding emphasis on one select NHA-wide initiative, such as interim assessments. Importantly, these NHA sessions help teachers grapple with challenges that are specific to their states and regions.

Priorities targeted for in-school professional development activities include:

- Instructional planning.
- Analyzing assessment data for insights on instructional tactics.
- Improving school culture.



- Working within an interactive classroom framework.
- Adhering to classroom routines that support student engagement and behavior management.
- Creating learning-oriented classroom environments.
- Recommitting to constant supervision of students, which is an essential foundation of our learning climate and school culture.
- Using assessment data to drive the planning and delivery of rigorous instruction.
- Creating and maintaining teacher-student relationships in which students become more comfortable asking questions and advancing their own learning.

Support and development

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

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

Additionally, NHA will provide various professional development opportunities for school leaders, including:

- *Leadership summit*: NHA plans and develops a week-long program in July for all school leaders. This time is invaluable for school leadership teams to hear from national experts, collaborate with others in the NHA network, and plan effectively with their teams for the upcoming school year.
- *Principal series/dean development series*: Each year, school leaders have opportunities to grow through peer collaboration and coordinated training and development events. These are often a combination of centralized, regional, and virtual events.
- *Leadership performer support*: Ongoing professional development is provided throughout the year related to performance, hiring, student data, serving parents, special education, intervention investments, and teacher satisfaction, among other topics. These sessions are conducted through podcasts or virtual classrooms and are recorded for anytime access.

Effective implementation

Carolina Scholars Academy's school leadership will lead efforts to determine professional



development needs. These team members will partner with NHA to create a customized plan founded upon the identified needs. Annually, our school leaders will complete a comprehensive assessment of the educational program and operations of Carolina Scholars Academy. Teachers will then develop a School Improvement Plan (SIP), analyzing student achievement, the school environment, the teacher and parent communities, and the administration. Our SIP will offer a strategic plan to fulfill needs, and both individualized and school-wide professional development efforts will be utilized to meet noted needs.

Q199. 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.



NHA's professional development for teachers starts before most teachers start their classroom assignments with a five-day paid new teacher summit (NTS) in July for all teachers who are new to any NHA-partner school. NTS includes segments on key features of NHA's academic and operational model. The summit is not merely an orientation session, with organizational leaders reciting facts and explaining policy. Instead, NTS sessions are participant-centered, with new teachers having ample opportunities to practice new strategies, tactics, and "teacher moves" they need to succeed in teaching and managing classrooms. A key NTS goal is to prepare new teachers for success in their first days in the classroom. For new teachers, such success is essential but not automatic. Teachers must earn students' respect and confidence early in the year to begin a strong learning culture.

A sample agenda during NTS includes the following:

- *Day One:* Classroom culture; purpose and vision; and, Behave with Care.
- *Day Two:* Classroom culture continued.
- *Day Three:* Curriculum and curricular tools; grade-level best practices.

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

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

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

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

Ongoing opportunities

Additional school-based staff training will take place in the days leading up to the first day of school.



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

Q200. Describe the expected number of days/hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan.



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

As noted, our staff members will complete New Teacher Summit (NTS) and NHA's Leadership Summit. Taking place over the course of a week, these are collaborative and intensive trainings that bring together peers from across the country (NHA partners with 100 schools). Our school is planning for seven days during the school year for professional development, including time to focus on EC and ML students. Our school day will include 45 daily minutes of planning time for each teacher.

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

Carolina Scholars Academy's staffing structure is conducive with our school's daily calendar. It allows core-subject teachers both individual and common planning time, and is scheduled to take place while students are receiving instruction in "specials" or electives.

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

We will place an emphasis on offering extensive professional development and training opportunities focused on instruction and serving EC students. Staff will take part in regional EC training in concert with other NHA-partner schools.

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

11.5. 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.

Q201. 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)).



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

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

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

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

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

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

We will schedule events specially planned for parents of students who have special needs. These families will have the chance to learn more about how Carolina Scholars Academy will successfully serve EC students. These meetings will be an open forum, providing families a chance to hear about what is most important to them when choosing a school for their child.



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

Q202. Describe how parents and other members of the community will be informed about the school.



Parent communication prior to school opening

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

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

Parent engagement

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

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

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



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

Q203. Describe your plan to recruit students during the planning year, including the strategies, activities, events, and responsible parties. Include a timeline and plan for student recruitment/engagement and enrollment, with benchmarks that will indicate and demonstrate suitable recruitment and enrollment practices over time.



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

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

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

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

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

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

We are confident we will meet our initial enrollment goal, as well as our goals to fill the school upon adding grades. However, the arrangement of our services agreement guarantees Carolina Scholars Academy to be operationally and financially viable regardless of whether or not we meet the 520 enrollment mark. NHA is obligated to provide the entire educational program irrespective of student



enrollment and we do not have to enroll the school to a certain level to guarantee this partnership.

A facet of NHA's longstanding experience with enrolling new schools across different communities has given the organization insight in historical trends. This helps to establish a forecast that allows the climate and culture to successfully accommodate growth.

Additional metrics will be utilized to understand whether or not we are tracking towards our goal of 520 kindergarten through fifth grade students in our initial year. We will use social advertising on Facebook and Instagram, digital advertising on search engines, and traditional media that may include radio, billboards, and television. We will measure metrics, including leads and letters of intent received, against historical data at other NHA-partner schools to ensure we are on track to meet all application forecasts.

Q204. Describe how students will be given an equal opportunity to attend the school. Specifically, describe any plans for outreach to: families in poverty, academically low-achieving students, students with disabilities, English learners, and other students at-risk of academic failure. If your school has a specific area of focus, describe the plan to market that focus.

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

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

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

Q205. What established community organizations would you target for marketing and recruitment?



Strong community knowledge will be key to the early success of Carolina Scholars Academy. We will have a dedicated local representative with a keen understanding of our area on staff. This team member will leverage the Board's knowledge and NHA's experience to lead grassroots marketing. This individual will build community relationships, including outreach to area daycare suppliers.

We also intend to build relationships with the following organizations: Junior Achievement of Eastern North Carolina, the Henderson Family YMCA, Franklin County Public Library, Louisburg College, Vance-Granville Community College, the Franklin County Education Foundation, United Way of Franklin County, Boys & Girls Clubs of North Central North Carolina, the Salvation Army of Henderson, Kiwanis Club of Henderson, Kiwanis Club of Youngsville, Big Brothers Big Sisters of Western North Carolina, and other community businesses. We will also build relationships with area churches, temples, and other houses of worship as well as HeadStart locations and other community educational programs and activity centers.

11.6. Parent and Community Involvement

Q206. Describe how you will communicate with and engage parents and community members from the time that the school is approved through opening.



Parents and community members have been involved in the concept and development of Carolina Scholars Academy. All governing Board members are either actively engaged in education, and/or are parents of school-aged children. This dynamic allows us to make decisions about the foundation of Carolina Scholars Academy from the perspective of what is best for the whole school community, as well as what would be best for parents as they consider enrollment in a school like ours. It also positions us well should we determine that there is demand for a future Pre-K program.

Our governing Board is extensively engaged and invested in our community. We are involved in groups and organizations that look to address the needs that face our area, and we look for solutions to meet those needs. We intend to partner with local organizations such as Junior Achievement of Eastern North Carolina to bring financial literacy, entrepreneurship, and workforce readiness programs to our students. We also hope to partner with the Franklin County Economic Development Commission to develop relationships with local businesses. We intend to leverage these relationships to offer mentorships, internships, and job shadowing opportunities for older students. As we continue to develop Carolina Scholars Academy, we will seek out partnerships with various organizations within our community.

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

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

Q207. 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.



We believe we can most successfully achieve our mission to prepare students for high school, college, and career, and meet the needs of all students by creating a culture that encourages family involvement.

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

Volunteering: Our dedicated parent room provides space in the school for parents and guardians to, simply put, have a constant presence at Carolina Scholars Academy. Additionally, we welcome parents to get involved in the day-to-day schedule of the school. This may entail assisting in supervising recess or lunch periods, or offering help in classrooms.

Monitoring children's education: Carolina Scholars Academy will actively engage parents in their children's learning. Prior to each school year, we will make parents and each student aware of grade-level performance expectations. Student progress against those goals will be communicated to parents regularly through direct teacher communication via phone calls and emails, our online student information system, progress reports, report cards, and parent-teacher conferences.

Parents will have access to a student information platform developed by NHA. This can be accessed from any computer with internet access, or a mobile application, through a specially designed parent portal. The *Parent Portal* will provide information related to student homework, offer resources for homework assistance, present student scores on various assessments, provide growth information, and host newsletters and school calendars.

School leaders may facilitate the formation of a parent organization at Carolina Scholars Academy. The Board will expect the parent organization to support our mission and student body in all it does and report to the Board frequently on the organization's initiatives. We will ensure that our parent organization has the policies and procedures in place to stay in compliance with the law, including those necessary for sound financial management.

In addition, we will ask our school leaders to facilitate the establishment of a parent advisory committee, which will present to the Board periodically on issues important to our most important stakeholders: parents and families.

Q208.If already identified, describe any programs you will offer to parents and/or the community and how they may benefit students and support the school mission and vision.



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

11.7. Admissions Policy

Q209. 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

Q213. 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.



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

Open Enrollment Period (OEP)

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

In addition, it is our goal that the school's student population demographically reflects the community's population. Marketing efforts will be made in the community surrounding the school to the fullest extent possible to support this goal. The school will use a variety of methods to promote a racial and ethnic balance that reflects the population of the surrounding area.

Applications and lottery

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

All applications received after the OEP ("late applications") will not be eligible to participate in the random selection process. If seats are available, late applications will be added to the end of the accepted list in the order received. If no seats are available, the late application will be added to the end of the waiting list or, if the late application is entitled to preference, inserted in the waiting list immediately before all applicants on the waiting list with a lower enrollment preference category.

A list with the name of each student who submitted an eligible application during the OEP will be created. The list will include, but not be limited to, the student's name, birth date, grade level to which the student is applying, street address, the names and grade levels of any siblings who are also applying for admission to the school, and any enrollment preference(s) that apply to the student.

A neutral third-party person (as previously described) will witness the electronically random selection of the names of each applicant. Any grades that will not be filled to capacity in the lottery will be considered before other grades in descending order. After all these grades have been identified, the order of the grades that will be filled to capacity in the lottery will be randomly selected. Once the grade order has been established, randomly selected students will be placed in available seats or on the waiting list in the applying grade if an offered seat is not available. If the selected student is



accepted and has siblings who are also applying for admission, the siblings will be accepted if there are offered seats available or placed on the waiting list with sibling preference if offered seats are not available. If the selected student is placed on the waiting list and has siblings who are also applying, the siblings' names will not be selected at this time or granted sibling preference but will wait until their grade level is selected. If multiple birth siblings apply, one surname will be entered into the random selection process to represent all of the multiple birth siblings. Other preferences will be incorporated as detailed in Enrollment Preferences.

Waiting List Priority

If a card is drawn and there is no space available in the appropriate grade, the applicant(s) will be placed on the waiting list in the order in which they are drawn. When a seat becomes available in a particular grade due to attrition, erosion, or other event, if that particular grade has a waiting list, that available seat will be filled by the first student on the waiting list.

Re-enrollment

Every student who is enrolled in the current school year and remains enrolled on the last day of the current school year is eligible to re-enroll for the subsequent year without participating in the random selection process. Enrolled students do not have to submit an application for the subsequent year; however, they will be requested to complete a re-enrollment form during the current school year showing intent to re-enroll for the subsequent school year.

Preferences

Enrollment preference is first given to currently enrolled students. Next preference is given to the following ordered categories of applicants: Children or grandchildren of employees working full-time in the operation of the charter school and Board of Directors (limited to no more than 15% of school's total enrollment), siblings of currently enrolled students who were admitted to the school in a previous year, siblings who apply to the charter school for admission beginning in the same school year, such as when a sibling was not initially admitted due to grade level capacity, and all remaining applicants.

Withdrawals/transfers

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

11.8. Certify

Q214. **This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.**



Yes

No

Q215.Explanation (optional):

Our Board has thoroughly examined and discussed this proposal, and has voted to approve its submission. Our Board recognizes that numerous elements of the practices, procedures, and systems outlined in this application are currently implemented at existing NHA-partner schools. As a result, considerable portions of the language in our application bear similarities to applications submitted in previous years.



12. Operations

12.1. Transportation Plan

Q216. 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 Scholars Academy will strive to make certain our school is accessible for all families and that transportation will never be a barrier for student attendance. We do not intend to offer bus transportation to the general student population, but we will offer parents and guardians resources and support to coordinate their transportation needs. We will provide transportation as required by any individual student's IEP, Section 504 plan, status as a student experiencing homelessness, or other applicable law.

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

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

Carolina Scholars Academy will implement a software program called Driveline to facilitate the process when parents arrive to pick up their student. This system allows students to stay in the classroom until their parent or guardian is on the school property. Classrooms then receive a non-disruptive notification when a specific student's parent or guardian is ready for pick-up. This system is efficient for traffic purposes, and it adds a new layer of student safety.

We recognize that this transportation strategy may not be a viable option for every family. Before the first day of school, we will work with parents to address and coordinate their needs to ensure that transportation is not a barrier to any child attending the school. School staff will also work to identify and plan the use of public transportation options that are available and, if needed, make arrangements with private carriers. However, we also recognize that our population may include students who have transportation needs, including students from outside the local area. We have budgeted funds to address those needs.

12.2. School Lunch Plan

Q217. 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.

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

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

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

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

12.3. 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

Q218. **Attach Appendix L: Insurance Quotes**

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

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

Applicant Evidence :


Appendix L - Insuran...

Uploaded on **4/23/2025**
by **Franklin County**
Charter

12.4. 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.

Q220. **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

Tybonya Livingston

12.5. Start-Up Plan



Q221. Provide a detailed start-up plan for the proposed school, specifying tasks, timelines, and responsible individuals (including compensation for those individuals, if applicable).

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

Facilities

Our tentative facility construction timeline is provided in Question 223. This includes a plan for identifying, building, and finalization of our school building.

Marketing and enrollment

We will begin advertising to families as soon as we are notified of approval of our proposal. Please see our marketing plan in Question 201 for more details about marketing, recruitment, and enrollment.

Staffing

Our Board, in partnership with NHA, intends to identify a school principal by January 2027. Doing so will allow our school leaders to begin recruiting and hiring key staff members as early as possible.

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

Q222. 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.



Our Board understands that charter schools commonly face significant hurdles during their initial years. This may include sufficient cash flow to provide the desired high-quality programming, hiring our school leader before opening, and more. Carolina Scholars Academy will avoid many risks new charter schools encounter by partnering with NHA. Our comprehensive services agreement, coupled with the organization's long-term commitment to our school, will ensure we are positioned well to pursue our mission and vision.

NHA has committed to making considerable investments to Carolina Scholars Academy, and we are excited about what that means for families in our area.

- As part of our delegation of daily operations to NHA, NHA is obligated to provide start-up funds for the development of curriculum and a technology system, selecting, hiring, and training staff, and for ensuring that our facility is clean and appropriately equipped. These are start-up investments by NHA and deemed to be contributions to our Board, with no expectations of repayment.
- Once a charter is awarded, NHA commits to purchase or lease real estate and build or renovate a building at no cost to our Board. NHA provides private capital to finance the facilities and provides these funds as a contribution, not a loan. This is typically a multi-million-dollar up-front investment to cover site plan reviews, permits, construction, and construction related costs.

12.6. 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.

Q223. What is your plan to obtain a building? Identify specific steps the board will take to acquire a facility and obtain the Educational Certificate of Occupancy. Present a timeline with reasonable assumptions for facility selection, requisition, state fire marshal and health inspections, and occupation.



Our Board understands the challenges that many schools face in acquiring a facility that meets the needs of their intended educational programming. As part of our partnership, NHA pledges a multi-million-dollar up-front investment to cover site plan reviews, permits, construction, and construction-related costs. The start-up investments by NHA are deemed to be contributions to our Board, with no expectation of repayment.

NHA has a documented record of successfully acquiring land and constructing or renovating schools across North Carolina, and nationwide in 100 total schools. This arrangement has successfully served schools for nearly 30 years, as it assists charter schools in overcoming one of their largest hurdles and comes at no cost to local taxpayers.

Our facility will be financed privately and built to house the entire planned Pre-K-8 academic program from day one, even though our school will be launched with fewer grades. Although this strategy may be more costly for NHA, it is valuable to us because it removes all potential disruptions as we deliver the academic program. We will not be distracted by ongoing renovations as we add grade levels. Being able to occupy a facility specifically designed for our planned educational program is a huge benefit for our students and staff. We will avoid overcrowding or trying to fit our program into facilities designed for a different purpose. Our partnership with NHA will give us the exact facility we want and need for our program.

As a result of NHA's experience navigating the land and construction processes, we believe Carolina Scholars Academy's facility will be complete in time to open in August 2027 and meet the needs to accomplish our mission and vision. Included below is a tentative proposed timeline for construction. These dates are subject to change and may be amended, as possible and necessary.

- Search for Suitable Site: Completed by June 30, 2025
- Select Suitable Site – Perform Due Diligence: Completed by July 1, 2026
- Contract for the Purchase/Lease of Primary Site: Completed by July 1, 2026
- Work to Obtain Entitlements (Land Use Approvals): Completed by June 20, 2026
- Close of Purchase of Property: Complete by July 1, 2026
- Commence Site Development: Complete by September 1, 2026
- Commence Construction: Completed by October 1, 2026
- Complete Sitework and Construction: Completed by June 1, 2027
- Obtain Certificate of Occupancy: Completed by July 1, 2027
- School Opens: August 2027

Securing an educational certificate of occupancy

Once NHA has secured a purchase or lease on our future school site, it will manage the construction process and report to our Board regularly on progress toward an on-time school opening. NHA will build/renovate and equip the facility as they do with other partner schools, complying with all health, building code, and safety requirements, including all requirements of the Americans with Disabilities Act. Given NHA's experience with this process, we are confident that our school will be completed and



receive an educational certificate of occupancy from the applicable jurisdiction in sufficient time for an opening in August 2027. We will follow the timeline for construction above and propose receiving our certificate of occupancy by July 1, 2027 at the latest.

Q224. 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 Scholars Academy will encompass about 45,000 square feet, and will include enough space for a play area, a play field, and adequate parking. This safe, clean, and learning-friendly school will be accessible to all students. The school building will include: classrooms (30), student support rooms (7), media center/library, gymnasium, parent room, art room, music room, administrative spaces, and front office. As noted, the building will have space for our entire elementary school programming when Carolina Scholars Academy opens, despite beginning with only grades K-5. This will allow our students and staff to leverage additional space in early years to build climate, culture, and implement key interventions and supports.

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

Q225. Describe school facility needs, including: science labs, art room, computer labs, library/media center, performance/dance room, gymnasium and athletic facilities, auditorium, main office and satellite offices, workroom/copy room, supplies/storage, teacher workrooms, and other spaces.

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

Q226. What is the breakdown of cost per square foot for the proposed facility? Outline how



this cost is comparable to the commercial and educational spaces for the proposed school location.

Our projected lease cost in year one with NHA is \$28.05/sq. ft. We are comfortable with these rates, as NHA is assuming all financial risk, buildings like ours are typically of single-use nature, and our lease is contingent upon our charter being renewed.

Q227.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 Board recognizes the importance of proper facilities in delivering quality education to students and has developed multiple pathways to manage potential complications. If our facility will not be ready by the time Carolina Scholars Academy is schedule to open, our Board will implement a structured contingency plan.

A "date certain" will be established as the deadline for securing all necessary entitlements for the primary facility. Should our Board fail to secure these entitlements by this predetermined date, we will formally request a one-year delay to ensure the school can open with appropriate facilities in place.

In the event that entitlements have been secured but the construction process does not proceed according to the established timeline, we have identified three viable alternatives. First, our Board may request a delayed opening to allow for completion of the permanent facility. Second, we may pursue temporary classroom space in nearby existing schools to accommodate students until the permanent facility is ready for occupancy. Third, our Board may initiate a search for an alternate facility site that can meet the immediate spatial needs of the school community.

When considering immediate spatial needs for temporary or alternative facilities, we will prioritize securing sufficient core academic classroom space, administrative offices, spaces that comply with all health and safety requirements, technological infrastructure to support the educational program, and appropriate accommodations for the delivery of special education services and interventions.

Our Board remains committed to implementing the full educational program as outlined in the charter application and will work diligently to minimize any disruption to student learning during this transitional period. Regular communication with all stakeholders will be maintained throughout this process to ensure transparency regarding facility status and program implementation.

Q228.Describe the board's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.



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

NHA has a documented record of successfully acquiring land and constructing schools across North Carolina, and nationwide in 100 total schools. NHA is providing us with expert real estate assistance for this application.

Part of the commitment NHA has made to our Board is to provide an initial multi-million-dollar investment so that we are ready to meet the needs of our community from day one. This includes a campus that allows us to best serve all student groups with our chosen educational program. NHA will manage the construction process and report to our Board regularly on progress toward an on-time school opening. NHA will build and equip the facility as they do with other partner schools, complying with all health, building code, and safety requirements, including all requirements of the Americans with Disabilities Act. Given NHA's experience with this process, we are confident that our school will be completed in sufficient time for an 2027-28 opening.

12.7. Certify

Q229. I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
- No

Q230. Explanation (optional):

Our Board has thoroughly examined and discussed this proposal, and has voted to approve its submission. Our Board recognizes that numerous elements of the practices, procedures, and systems outlined in this application are currently implemented at existing NHA-partner schools. As a result, considerable portions of the language in our application bear similarities to applications submitted in previous years.



13. Financial Plan

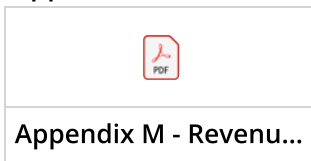
13.1. Charter School Budget

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.

Q230. If applicable, attach as Appendix M: Revenue Assurances. Assurances are needed to confirm the commitment of any additional sources of revenue.

Attached as Appendix M - Revenue Assurances is a Letter of Financial Commitment from our management partner, National Heritage Academies.

Applicant Evidence :



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by **Franklin County**
Charter

Q231. Attach as Appendix N: Proposed Budget for Year 1 through Year 5 [Click here to access and download the Budget Template \(https://www.dpi.nc.gov/2025-nc-charter-application-budget-template/download?attachment\)](https://www.dpi.nc.gov/2025-nc-charter-application-budget-template/download?attachment) **"Please be advised that Google Sheets is not supported for use with the NC charter budget template. Additionally, due to the functions running on the back end of the workbook, it is required that applicants use: Excel 2021 or later (PC and Mac) Excel for Microsoft 365 Subscriptions (PC and Mac Versions) Excel Online"**

Upload Required File Type: excel Max File Size: 30 Total Files Count: 5



Applicant Evidence :



Appendix N - Propos...

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by **Franklin County**
Charter

13.2. Budget Narrative

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

Q233. How was the student enrollment number projected?

The need for additional high-quality educational choice in our area has our Board confident that we will attract and enroll the specified student benchmarks. Franklin County is experiencing rapid, continued growth. The county's population has grown by over 31 percent since 2010, and has grown by 16.2 percent in the last four years alone. Additionally, fifty-one percent of Franklin County families contacted in an anonymous survey expressed their interest in a new school choice. We propose that Carolina Scholars Academy will open serving 520 students in grades kindergarten through fifth. We intend to add one grade each year until we offer all of K-8 (772 students in total). At full capacity, our school will have four kindergarten classrooms and three classrooms for all other grades served.

Our partnership with NHA also helps to make certain we have the ability to cover all expenses to meet all short-term obligations – including payroll – even prior to receiving the state, local, and federal funds due to the school. This is a significant benefit in the early years of our school, easing and improving our financial planning process.

Q234. Provide an explanation as to why you believe there is a demand for the school that will meet this enrollment projection.



As noted, Franklin County is in need of additional educational choice and is experiencing sustained population growth. To gauge interest in our school, we reached out to families in Franklin County. Fifty-one percent of families contacted in an anonymous survey expressed their interest in a new school choice while 50 percent of those responding said the quality of education for their child to be average, at best. Only 46 percent of respondents expressed satisfaction with the quality of education at their child's current school. Additionally, the NHA model has proven to be effective and attractive to area families. NHA partners with six schools in the greater Research Triangle area, with a seventh school set to open in the fall of 2025. Combined, these schools serve over 4,000 students with nearly 300 additional students on wait lists.

Q235. Provide the break-even point of student enrollment.

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

Q236. Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.

Our Board's services agreement with NHA requires NHA to commit all necessary funds to meet expenditures exceeding revenues in our school's early years. This allows for plans and phased growth. We have included a budget that has been conservatively constructed. It includes an anticipated contribution from NHA of approximately \$1.3 million in our first year (this is not a loan). An additional \$526,000 is included for year two. Being contributions, our Board is not obligated to repay any of these funds.

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

Q237. 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.

Carolina Scholars Academy's budget is comprised of state and federal revenue and NHA contributions to cover full operating expenses in the early years. These funds are not loans, and our Board is not expected or obligated to repay NHA's upfront investment. These funds are included in the line item "Other Funds." NHA's contributions are budgeted at approximately \$1.3 million in our first year of operations and \$526,000 in the second year of operations.

Q238. Provide the student to teacher ratio that the budget is built on.

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

Q239. Describe the board's individual and collective qualifications and capacity for implementing the financial plan successfully.

This initial Carolina Scholars Academy Board of Directors was formed by our Lead Applicant, Tykayla Livingston. Tykayla has a background in education and has conducted extensive research regarding the necessity of a charter school in Franklin County. She, in partnership with the Carolina Scholars Academy Board, has the expertise necessary to successfully oversee Carolina Scholars Academy. Tykayla gathered additional Board members to assemble a Board committed to offering an additional, high-quality educational choice to families in the Franklin area. Our Board is comprised of members with expertise in the areas of education, public administration, organizational leadership, and community engagement. In addition, we have multiple Board members with experience founding and/or serving on the Board of a charter school, and serving on a Board in a financial role.

As the Carolina Scholars Academy Board, we take seriously our responsibility to hold NHA accountable for our school's academic, organizational, and financial performance.

Q240. 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.



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

As described in previous sections, our school will implement a comprehensive system for identifying students with disabilities requiring exceptional children's services. Upon enrollment, staff will review all incoming student records to identify existing IEPs or 504 plans. If a student who did not enter our school with an existing IEP or 504 plan is experiencing academic and/or behavioral difficulties in the general education setting, the teacher, other educational staff, and/or the parent may refer the student to the school's Intervention Assistance Team (IAT). This team will include the principal (or his or her designee), a classroom teacher, and the referring teacher. The student's parent or guardian will be invited to participate in this meeting and share more information. The IAT will review and analyze screening information/data, response-to-intervention (RtI) results, and data on classroom performance, discipline, and state assessments, as well as information provided by parents. We will use this data and information to determine the best educational/behavioral interventions for the student and service/support options (e.g., counseling or school social work support)

Upon identification of a student with high-needs disabilities, our team will thoroughly review their IEP to determine the specific accommodations, modifications, and services required to appropriately serve the student in the least restrictive environment. This review will include an analysis of staffing requirements, specialized equipment needs, potential facility modifications, and additional support services that may be necessary to implement the IEP with fidelity. Should the needs of these students exceed our initially budgeted resources, we will evaluate our existing budget for potential reallocation of funds to support these additional needs. We will also explore supplemental funding options, including federal IDEA funds, Medicaid reimbursement for eligible services, and applicable state exceptional children's funding mechanisms.

In cases where student needs require specialized expertise beyond our immediate staffing capabilities, we will establish partnerships with external organizations and service providers who specialize in supporting students with complex disabilities. These contracts will be carefully structured to ensure cost-effectiveness while maintaining service quality.

For students requiring intensive support, we will establish self-contained classroom environments as needed, staffed with appropriately licensed exceptional children's teachers and supported by qualified instructional assistants. The implementation of such classrooms will be carefully planned to ensure compliance with all relevant regulations while maintaining fiscal responsibility.

Through thoughtful planning, strategic partnerships, and responsive fiscal management, we are committed to meeting the needs of all students with disabilities while maintaining the school's



financial viability and educational excellence.

Staff will always be compensated, and expenditures will be covered against unforeseen instances as a result of our partnership with NHA. This is the case even before Carolina Scholars Academy receives per pupil funding. The included budget maintains a contribution from NHA for each of Carolina Scholars Academy's initial two years (a total contribution of over \$1.8 million). The absence of this financial security adversely impacts new charter schools, and our budget has been constructed to successfully serve students with special needs. We will not specifically know the needs of our students until a charter is granted and enrollment is opened. However, we find it vital to plan for resources that will meet the needs of our entire student population.

Q241. If there is a plan to outsource any or all financial management areas such as payroll, benefits, audits, fundraising, accounting, etc., provide a statement on how the vendors will be selected and how the board will oversee their activities to ensure fidelity and compliance.

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

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

Q242. 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.

Our board contracts with NHA through a services agreement. This agreement requires NHA to offer our school all the staffing, school services, and back-office functions it needs. This includes accounting, business services, purchasing, and payroll. On our behalf, NHA will adhere to all applicable state and federal statutes, rules, and regulations with regard to the selection of contractors and large purchases. This includes competitive bidding or sole-source documentation, as necessary.

Q243. Explain how the budget aligns with the school's mission, curricular offerings,



transportation plans, and facility needs.

Carolina Scholars Academy will maintain a balanced budget for its operations every year. NHA has a longstanding history of success in opening and operating schools. It has committed to the start-up of each partner school's educational program by making additional contributions that supplement public revenues. NHA has never had a partner school due to a lack of financial stability.

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

NHA maintains a "Total Rewards" compensation structure coupled with competitive benefit offerings. This will assist our school in recruiting, hiring, and retaining high-quality team members. Carolina Scholars Academy will have the necessary structures and supports to cultivate and foster a climate and culture that allows excellent teachers to grow in responsibility and leadership. We will commit to making certain Carolina Scholars Academy is available to every student and that transportation will not be a barrier to attendance for any student. We have budgeted \$30,000 to cover the transportation needs for students experiencing homelessness and EC students requiring transportation according to their IEPs.

Q244. What percentage of expenditures will be the school's goal for a general fund balance? Describe how the school will develop the fund balance.



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

Due to their obligation to cover all planned costs, we will not require a substantial fund balance. Our Board maintains experience with education, public administration, and organizational leadership, allowing us to confirm NHA's financial commitment to its partner schools. Through our services agreement and Board accountability, NHA will be required to operate the school in accordance with the budget approved by our Board.

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

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

In accordance with our services agreement, our Board will retain a discretionary expenditure fund to be used for Board-driven school purposes and programs. We are contemplating using these funds to create a fund balance and may set aside up to half of these funds each year to build an ongoing fund balance. We will revisit our fund balance needs after each year of operations as part of our annual evaluation of the performance of NHA. If, as we believe will occur, we are satisfied with the performance of NHA and with the strength the Board has under our services agreement, we will be comfortable choosing to reinvest these funds in the educational program at our school. Our budget with this application does not reflect this potential surplus, as we chose to project satisfaction with our programming.



Q245. Provide a description of proposed financing structure. Include financing of facilities, other asset financing, and leases.

Our proposed budget assumes that no funds from banks, other lending institutions, outside corporations, or other sources will be required.

Though Carolina Scholars Academy will open with grades K-5 and grow to K-8 over subsequent years, our entire elementary school educational program will be established and implemented from day one. Our full academic program will be in place by year four. We understand the benefits of initially occupying facilities constructed to house a full Pre-K-8 configuration, despite not offering all grades until our fourth year of operation.

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

Q246. Will the school have assets from other sources (e.g. building, furniture, chairs, computers, etc.)? If yes, please provide a list. Note which are secured and which are anticipated, and include evidence of commitment for any assets on which the school's core operation depends.

Our draft services agreement with NHA states that it will purchase and provide assets on behalf of Carolina Scholars Academy. We will not have assets from any additional sources.

13.3. Financial Compliance

Q247. How will the school ensure adequate internal controls, including segregation of duties, safeguarding of assets, accurate and adequate record keeping?



Our Board will implement and follow a policy that outlines the fiscal management needed for the strong internal controls. We will ensure these are strictly followed by NHA and our school.

Our services agreement ensures that the school receives from NHA a full suite of operations services, including financial services such as accounting, purchasing, and payroll. Additionally, support staff will include a school finance controller who serves as a guide to the school's finances. This position will regularly provide the principal with detailed income statements and reconciliation of funds. On a quarterly basis, financial statements will be prepared for the Board, including both an income statement and a balance sheet. Additionally, on a monthly basis our Board will review and consider a detailed invoice that includes specific management services provided at the school by NHA.

The NHA Financial Services team will ensure that financial reporting requirements are met. A system of financial controls will be established to ensure all purchases made with federal, state, and private revenues are controlled and monitored. NHA has an integrated computerized system that manages all payroll, purchasing, general ledger, grant accounting, fixed assets accounting, and cash disbursements activities. NHA has written policies for purchasing, accounts payable, the use of corporate credit cards, Board discretionary funds, principal discretionary funds, school money handling, deposits, and a security policy.

We are confident that vigorous Board oversight and NHA's systems and controls will ensure that the school complies with the highest standards of fiscal responsibility and accountability.

Q248. Provide any known or possible related party transactions (relationship, description of transaction, and estimated dollars involved).

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

Q249. Provide the name of the firm approved by the NC Local Government Commission (LGC) that will conduct the audit. Include the complete mailing address, telephone number, and fax number. If a firm has yet to be identified, please list the firms the board has investigated.



Our Board reviewed information on multiple audit firms during our April 2025 Board meetings and identified Plante Moran as our intended auditor. A representative from Plante Moran met with our Board to discuss all items required for an annual independent audit of our finances and 990 preparations. We are confident they will serve well the needs of Carolina Scholars Academy.

Name: Plante Moran

Address: 1111 Michigan Ave, East Lansing, MI 48823

Phone Number: 517-332-6200

13.4. Certify

Q249. I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
- No

Q250. Explanation (optional):

Our Board has thoroughly examined and discussed this proposal, and has voted to approve its submission. Our Board recognizes that numerous elements of the practices, procedures, and systems outlined in this application are currently implemented at existing NHA-partner schools. As a result, considerable portions of the language in our application bear similarities to applications submitted in previous years.




14. Other Forms


Q252. 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: 2

Resources


2025 Charter School ...

Applicant Evidence :


Carolina Scholars Ac...

Uploaded on **4/23/2025**
by **Franklin County**
Charter



15. Third-party Application Preparation

Q253. Was this application prepared with the assistance of a third-party person or group?

Yes

No

Q254. Give the name of the third-party person or group:

National Heritage Academies

Q255. Fees provided to the third-party person or group:

No fees were provided to National Heritage Academies for their assistance in the preparation of this application.



16. 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 26, 2024, at 5:00 pm EDT** for Fast Track and Accelerated applications, and **April 26, 2024, at 5:00 pm EDT** for traditional timeline applications. Payments will be accepted in the form of a certified check. Cash nor credit cards are accepted.

Q256.*Application Note: The applicant must mail the certified check or money order along with the Application Fee Payment Form (see the resources to download Payment Form) before or on the due date of April 26, 2024, at 5:00 pm EDT.

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



2025 Payment Form....

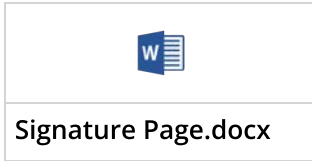


17. Signature page

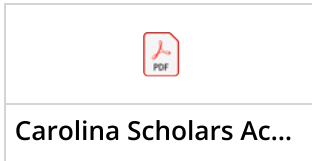
Q257. Fill out the attached resource and get it signed and notarized. Then upload as a PDF or image file.

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

Resources



Applicant Evidence :



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by **Franklin County**
Charter

Q258. Board chair, please digitally sign your application here.
Signature

Tykyla Livingston



Final Status

Reject Approve

Approver Comments



Appendix J: Proposed By-Laws of the Nonprofit Organization or Municipality

Carolina Scholars Academy

**BYLAWS
OF
CAROLINA SCHOLARS ACADEMY**

ARTICLE 1 — NAME

The name of the corporation shall be Carolina Scholars Academy. (the “**Corporation**”).

ARTICLE 2 — PURPOSES

The purposes for which the Corporation is organized are:

(A) To operate a public charter school in the State of North Carolina pursuant to N.C. Gen. Stat. § 115C-218 *et seq.*;

(B) To provide a K-12 education that places each student on the path to academic proficiency and college readiness; and

(C) To operate exclusively for religious, charitable, scientific, literary, or educational purposes within the meaning of Sections 501(c)(3) and 170(c)(2) of the Internal Revenue Code of 1986 or the corresponding provisions of any future U.S. Internal Revenue laws (the “**Code**”), provided the Corporation shall not carry on any activities not permitted to be carried on by an organization exempt from Federal income tax under Section 501(c)(3) of the Code.

ARTICLE 3 — OFFICES

1. Principal Office. The principal office of the Corporation shall be located at 5488 US 401 North, Louisburg, Franklin County, North Carolina 27549.

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

3. Other Offices. The Corporation may have offices at such other places within the State of North Carolina as the Corporation’s Board of Directors (the “**Board**”) may determine from time to time.

ARTICLE 4 — BOARD OF DIRECTORS

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

2. Number and Election. The number of Directors on the Board (the “**Directors**”) shall not be less than five (5) or more than seven (7). At any annual meeting, the Directors may

fix the number of Directors to be elected at the meeting by resolution. In the absence of such a resolution, the number of Directors elected at the meeting, plus the number of Directors continuing in office, shall constitute the number of Directors of the Corporation until the next annual meeting, unless the number is changed by action of the Board. Directors shall be elected at any annual or special meeting of the Board by a vote of a majority of the Directors then in office. The election of Directors shall be a part of the order of business of each annual meeting of the Board.

3. Terms. The initial Directors shall be divided into two (2) classes, as nearly equal in number as possible, to serve in the first instance for terms of one (1) and two (2) years, respectively, and until their successors shall be elected and shall qualify. Thereafter, the successors in each class of Directors shall be elected to serve for terms of four (4) years and until their successors shall be elected and shall qualify. In the event of any increase or decrease in the number of Directors, the additional or eliminated directorships shall be classified such that all classes of Directors remain or become equal in number, or as nearly equal in number as possible. In the event of the death, resignation, retirement, removal, or disqualification of a Director during the elected term of office, the Director's successor shall be elected to serve only until the expiration of the term of the predecessor. Directors may be reelected and may serve up to two consecutive terms of four (4) years.

4. Qualifications. A Director shall be willing and able to make decisions as a member of the Board in the best interests of the Corporation and shall submit on an annual basis a conflict of interest disclosure as prescribed by the Board. A Director shall also be at least 21 years of age, be a resident of the State of North Carolina, and hold at least a high school diploma or its equivalent.

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

6. Removal. A Director may be removed by the Board with or without cause by a resolution duly adopted by a majority of the Directors then in office.

7. Resignation. A Director may resign at any time by providing written notice to the President of the Corporation, or if the President is resigning or the Presidency is vacant, then to the next highest-ranking officer of the Corporation (an "**Officer**"). The resignation shall be effective when communicated, unless the notice specifies a later effective date or subsequent event upon which it will become effective.

8. Vacancies. A vacancy on the Board shall be filled as provided in Section 2 of this Article.

9. Compensation. All Directors shall serve as volunteers without compensation. By resolution of the Board, Directors may be reimbursed for their reasonable expenses incident to their duties in accordance with applicable law.

ARTICLE 5 — MEETINGS OF DIRECTORS

1. Annual Meeting. The annual meeting of the Board shall be held in the month of May of each year for the purpose of electing Directors and Officers and transacting such other business as may be properly brought before the Board. If the annual meeting is not held as designated by these Bylaws, a substitute annual meeting may be called by or at the request of any two Directors and such meeting shall be designated and treated for all purposes as the annual meeting.

2. Regular Meeting. The Board shall set a schedule of the time and place for the holding of regular meetings, which shall occur at least once each month.

3. Special Meeting. Special meetings of the Board may be called by or at the request of any two Directors.

4. Open Meetings. All meetings of the Board shall comply with Article 33C of Chapter 143 of the North Carolina General Statutes. Consistent with that Article, the Board shall, among other things: (i) cause a current copy of the schedule of its regular meetings to be kept on file with the Secretary of the Corporation and (ii) give public notice of regular, special, and emergency meetings pursuant to N.C. Gen. Stat. § 143-318.12.

5. Place of Meetings. Meetings of the Board may be held at the principal office of the Corporation or at such other place as shall be designated in the notice of the meeting or agreed upon at or before the meeting by a majority of the Directors then in office. However, unless conducted electronically, all meetings of the Board shall take place within the State of North Carolina and within close proximity to the charter school operated by the Board, such that parents, students, and interested parties may attend.

6. Manner of Acting. The act of the majority of the Directors then in office at a properly noticed and conducted meeting shall be the act of the Board, except as otherwise provided by law.

7. Meeting by Conference Telephone. Any one or more Directors may participate in a meeting of the Board by conference telephone or other electronic means which allows all Directors to simultaneously hear one another during the meeting, and such participation shall be deemed presence in person at such meeting. If the Board holds a meeting by conference telephone or other electronic means, it shall provide a location and means whereby members of the public may listen to the meeting, and notice of the meeting shall be provided as required by N.C. Gen. Stat. § 143-318.13.

ARTICLE 6 — COMMITTEES

1. Committee Authority. The Board may designate one or more committees by resolution. Each committee shall consist of three (3) or more Directors elected by the Board and shall have such powers as may be delegated by the Board, except that no committee may: (i) authorize distributions to or for the benefit of Directors or Officers; (ii) approve dissolution, merger or the sale, pledge or transfer of all or substantially all of the Corporation's assets; (iii) elect, appoint or remove Directors, or fill vacancies on the Board or on any of its committees, (iv) elect Officers, (v) adopt, amend, or repeal the Articles or Bylaws, or (vi) take any action the Board cannot lawfully delegate under the Articles, Bylaws, or applicable law.

2. Committee Conduct. Each committee shall fix its own rules governing the conduct of its activities and shall make such reports to the Board of its activities as the Board may request. The provisions in Article 5 applicable to meetings of the Board shall apply to meetings of committees.

ARTICLE 7 — OFFICERS OF THE CORPORATION

1. Number and Titles. The Officers of the Corporation shall be a President, Vice President, Secretary, and Treasurer. Except as otherwise provided in these Bylaws, the Officers shall have the authority and perform the duties as from time to time may be prescribed by the Board. Any two or more offices may be held by the same individual, but no Officer may act in more than one capacity where action of two or more Officers is required.

2. Election and Term of Office. The Officers shall be elected by the Board at the annual meeting. If the election of Officers is not held at the annual meeting, the election shall be held as soon thereafter as may be convenient. Each Officer shall hold office until the next annual meeting and until a successor is elected and qualifies.

3. Removal. Any Officer elected or appointed by the Board may be removed at any time by the Board with or without cause.

4. Resignation. An Officer may resign at any time by providing written notice to the President of the Corporation, or if the President is resigning or the Presidency is vacant, then to the Officer holding the next highest office. The resignation shall be effective when communicated, unless the notice specifies a later effective date or subsequent event upon which it will become effective.

5. Vacancies. A vacancy in any office shall be filled by the Board for the unexpired portion of the term.

6. President. The President shall be a member of the Board and shall preside at all meetings of the Board. The President shall sign, with any other proper Officer, instruments which may be lawfully executed on behalf of the Corporation, except where required or

permitted by law to be otherwise signed and executed, and except where the signing and execution shall be delegated by the Board to some other Officer. The President shall, in general, perform all duties incident to the office of President as may be prescribed by the Board from time to time.

7. Vice President. The Vice President shall be a member of the Board and shall exercise the powers of the President during that Officer's absence or inability to act. Any action taken by a Vice President in the performance of the duties of the President shall be presumptive evidence of the absence or inability to act of the President at the time the action was taken. The Vice President shall have such powers and perform such other duties as from time to time may be assigned to the Vice President by the President or by the Board.

8. Secretary. The Secretary shall be a member of the Board and shall be responsible for keeping the minutes of the Board meetings and seeing that all notices are duly given in accordance with the provisions of these Bylaws or as required by law. The Secretary shall have general charge of the corporate books and records. The Secretary shall sign such instruments as may require the signature of the Secretary and in general shall perform all duties incident to the office of Secretary and other duties as from time to time may be assigned to the Secretary by the President or the Board.

9. Treasurer. The Treasurer shall be a member of the Board and shall: (i) have charge and custody of and be responsible for all funds and securities of the Corporation; (ii) keep accurate books and records of receipts and disbursements; (iii) deposit all moneys and securities received by the Corporation in such banks, trust companies, or other depositories as shall be selected by the Board; and (iv) see that all required corporate filings are made. The Treasurer shall, in general, perform all duties incident to the office of Treasurer and such other duties as from time to time may be assigned to the Treasurer by the President or by the Board.

10. Compensation. All Officers shall serve as volunteers without compensation. By resolution of the Board, Officers may be reimbursed for their reasonable expenses incident to their duties in accordance with applicable law.

ARTICLE 8 — CONTRACTS, LOANS, CHECKS AND DEPOSITS; SPECIAL CORPORATE ACTS; GENERAL PROVISIONS

1. Contracts. The Board may authorize any one or more Officers to enter into any contract or other instrument on behalf of the Corporation. Such authority may be general or confined to specific instances. When the Board authorizes the execution of a contract or of any other instrument in the name of and on behalf of the Corporation, without specifying the executing Officers, the President or Vice President, and the Secretary or Treasurer may execute the same.

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.

3. Checks, Drafts, and Orders for Payment. All checks, drafts, or other orders for the payment of money, notes, or other evidences of indebtedness issued in the name of the Corporation shall be signed by such Officer or Officers as shall from time to time be determined by resolution of the Board.

4. Deposits. All funds of the Corporation shall be deposited from time to time to the credit of the Corporation in such banks, trust companies, or other depositories as the Board may select.

5. Conflict of Interest. A Director shall inform the Board of any direct or indirect conflict of interest which the Director has with regard to any transaction contemplated by the Board (a “**Conflict of Interest**”). A Conflict of Interest shall exist in Board actions including, but not be limited to, actions concerning a transaction in which the Director: (i) has a material financial interest; or (ii) is presently serving as a director, trustee, officer, or general partner of another party. Pursuant to N.C. Gen. Stat. § 55A-8-31, the Director with a Conflict of Interest may participate in the discussion, but may not vote on the transaction. The transaction is authorized, approved, or ratified by the vote of a majority of the Directors then in office who have no Conflict of Interest, which must be more than one Director.

6. Contracts between the Corporation and Related Persons. The Corporation may not enter into a contract with a related person to the extent such contract and any transfers in connection therewith might cause or imply private benefit under the relevant sections of the Code or applicable provisions of state ethical requirements for local government officials.

ARTICLE 9 — INDEMNIFICATION

It shall be the policy of the Corporation to indemnify to the maximum extent permitted by Chapter 55A of the North Carolina General Statutes each person who is or was a Director, Officer, or member of a committee of the Board and each person who serves or has served at the request of the Board as a trustee, Director, Officer, partner, or employee of another corporation, partnership, joint venture, trust, or other enterprise. The Corporation may purchase and maintain insurance on behalf of any such person against any liability asserted against and incurred by such person in any such capacity or arising out of his or her status as such, whether or not the Corporation would have power to indemnify such person against such liability under the preceding sentence. The Corporation may, to the extent authorized from time to time by the Board, grant rights to indemnification to any employee of the Corporation. Notwithstanding any provision of this Article to the contrary, the Corporation shall not indemnify any person described in this Article if such indemnification would jeopardize the Corporation’s tax-exempt status under Section 501(c)(3) of the Code. The Corporation may advance expenses in connection with any proceeding to such person in accordance with applicable law. The use of

funds of the Corporation for indemnification or for purchase and maintenance of insurance for the benefit of the persons designated in this Article shall be deemed a proper expense of the Corporation.

ARTICLE 10 — FISCAL YEAR

The fiscal year of the Corporation shall begin on the first day of July in each year and end on the following June 30; provided that the first fiscal year shall begin on the date of incorporation.

ARTICLE 11 — DISPOSITION OF ASSETS

If the Corporation is granted a charter to operate a public charter school by the State Board of Education and the Corporation is subsequently dissolved or the charter is terminated or not renewed, then all net assets of the Corporation purchased for the school shall be deemed the property of and distributed to the local school administrative unit in which the school is located in accordance with N.C. Gen. Stat. § 115C-218.100 or the corresponding provision of any future North Carolina charter school law. To the extent the Corporation possesses assets other than those subject to distribution pursuant to N.C. Gen. Stat. § 115C-218.100, upon termination, dissolution, or winding up of the affairs of the Corporation, the Directors shall, after paying or making provision for payment of all liabilities of the Corporation, distribute all such remaining assets among one or more organizations, which are organized and operated for exempt purposes and qualified as exempt organizations under Section 501(c)(3) of the Code and to which contributions are deductible under Section 170(c)(2) of the Code, or to federal, state, and local governments to be used exclusively for public purposes.

ARTICLE 12 — NON-DISCRIMINATION

The public charter school operated by the Corporation shall permit students of any race, gender, religion, color, ethnicity, socio-economic status, and national origin to all the rights, privileges, programs, and activities generally accorded or made available to students at the charter school.

ARTICLE 13 — 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 notice of the meeting shall have been given which states that the purpose or one of the purposes of the meeting is to consider a proposed amendment to the Bylaws and includes a copy or summary of the proposed amendment or states the general nature of the amendment.

SECRETARY'S CERTIFICATE

This document is to certify that the foregoing Bylaws of Carolina Scholars Academy were duly adopted by resolution of the Board, effective as of the 7 day of April, 2025.

IN WITNESS WHEREOF, the undersigned, being the duly elected and acting Secretary of the Corporation, has signed this Secretary's Certificate this the 7 day of April, 2025.

Sienna Brooks
Secretary, Carolina Scholars Academy

[Signature]
Signature



Appendix K: Articles of Incorporation or Municipal Charter

Carolina Scholars Academy

SOSID: 3026108
Date Filed: 4/15/2025 11:40:00 AM
Elaine F. Marshall
North Carolina Secretary of State
C2025 084 07347

**ARTICLES OF INCORPORATION
OF
CAROLINA SCHOLARS ACADEMY**

The undersigned, being of the age of eighteen years or older, does make and acknowledge these Articles of Incorporation for the purpose of forming a corporation under and by virtue of the North Carolina Nonprofit Corporation Act, as provided in Chapter 55A of the General Statutes of North Carolina.

ARTICLE I

The name of the corporation is Carolina Scholars Academy (the “**Corporation**”).

ARTICLE II

The Corporation is a “charitable or religious corporation” as defined in N.C. Gen. Stat. § 55A-1-40(4).

ARTICLE III

The street address and county of the Corporation’s registered office is 5488 US 401 North, Louisburg, Franklin County, North Carolina 27549. The name of the Corporation’s registered agent at that address is Tykayla Livingston.

ARTICLE IV

The street address and county of the Corporation’s principal office is 5488 US 401 North, Louisburg, Franklin County, North Carolina 27549.

ARTICLE V

The name of the incorporator is Tykayla Livingston and her address is 5488 US 401 North, Louisburg, North Carolina 27549.

ARTICLE VI

The Corporation shall have no members.

ARTICLE VII

The purposes for which the Corporation is organized are:

- a. To operate a public charter school in the State of North Carolina pursuant to N.C. Gen. Stat. § 115C-218 *et seq.*;
- b. To operate exclusively for charitable, educational, religious, and scientific purposes within the meaning of Sections 501(c)(3) and 170(c)(2) of the Internal Revenue

Code of 1986 or the corresponding provisions of any future United States Internal Revenue laws (the “Code”); and

c. To engage in any lawful activity for which corporations may be organized under Chapter 55A of the General Statutes of North Carolina, provided the Corporation shall not carry on any activities not permitted to be carried on by an organization exempt from Federal income tax under Section 501(c)(3) of the Code or the corresponding provision of any future United States Internal Revenue Code.

ARTICLE VIII

The Board of Directors of the Corporation shall consist of those persons as may be elected to the Board of Directors from time to time in accordance with the provisions of the bylaws of the Corporation. Subject to those provisions, the Board of Directors alone shall have the authority to adopt and amend the bylaws, approve budgets, and govern and conduct the affairs of the Corporation.

ARTICLE IX

If the Corporation is granted a charter to operate a public charter school by the North Carolina Charter Schools Review Board and the Corporation is subsequently dissolved or the charter is terminated or not renewed, then all net assets of the Corporation purchased for the school with public funds shall be deemed the property of and distributed to the local school administrative unit in which the charter school is located in accordance with N.C. Gen. Stat. § 115C-218.100(b) or the corresponding provision of any future North Carolina charter school law. To the extent the Corporation possesses assets other than those subject to distribution pursuant to N.C. Gen. Stat. § 115C-218.100(b), upon termination, dissolution, or winding up of the affairs of the Corporation, the Directors shall, after paying or making provision for payment of all liabilities of the Corporation, distribute all such remaining assets among one or more organizations which are organized and operated for exempt purposes and qualified as exempt organizations under Section 501(c)(3) of the Code and to which contributions are deductible under Section 170(c)(2) of the Code, or to federal, state, and local governments to be used exclusively for public purposes.

ARTICLE X

No part of the net earnings of the Corporation shall be distributable to or inure to the benefit of its officers or directors or any private person, except that the Corporation shall be authorized to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of its exempt purposes. No substantial part of the activities of the Corporation shall be the carrying on of propaganda or otherwise attempting to influence legislation (except to the extent permitted by Section 501(h) of the Code), and the Corporation shall not participate in or intervene in any political campaign on behalf of any candidate for public office, including the publication or distribution of statements. Notwithstanding any other provision hereof, the Corporation shall not carry on any other activities not permitted to be carried on by: (i) a corporation exempt from federal income tax under Section 501(c)(3) of the

Code; or (ii) a corporation to which contributions are deductible under Section 170(c)(2) of the Code.

ARTICLE XI

To the maximum extent permitted by applicable law, no person who is serving or who has served as a Director of the Corporation shall be personally liable for any action for monetary damages for breach of his or her duty as a Director, whether such action is brought by or in the right of the Corporation or otherwise. Neither the amendment or repeal of this paragraph, nor the adoption of any provision of these Articles of Incorporation inconsistent with this paragraph, shall eliminate or reduce the protection afforded by this paragraph to a Director of the Corporation with respect to any matter which occurred, or any cause of action, suit, or claim which, but for this paragraph would have accrued or risen, prior to such amendment, repeal, or adoption.

These Articles of Incorporation are hereby signed by the incorporator on the 25th day of March, 2025.

A handwritten signature in black ink, appearing to read "Tykayla Livingston", written over a horizontal line.

Tykayla Livingston, Incorporator

**Academic
School Year**

Grade Levels

**Total Projected
Student Enrollment**

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

**Academic
School Year**

Grade Levels

**Total Projected
Student Enrollment**

Year 1
Year 2
Year 3
Year 4
Year 5

Ethnicity/Race	# of Students	Percentage (%)
American Indian or Alaska Native	1	0%
Asian	3	1%
Black or African American	160	31%
Hispanic	135	26%
Native HI or Pacific Islander	0	0%
Two or More Races	34	7%
White	187	36%
EDS Subgroups		0%
Economically Disadvantaged Students	295	61%
Students with Disabilities	75	16%
English Language Learners	59	12%
Students Experiencing Homelessness	52	11%



Appendix A: Evidence of Community/ Parent Support

Carolina Scholars Academy

National Heritage Academies Third-Party Market Demand and Feasibility Phone Surveys

Summary: When National Heritage Academies is invited by a local community group to explore a potential partnership for a new charter school, it conducts thorough research and due diligence to ensure a new school in an area would be as successful as possible. Specific efforts study:

- Need for additional high-quality educational choice in the area;
- Demand for a new school; and,
- Metrics to understand the feasibility of successfully achieving the previously-listed bullets.

One measure of need, demand, and success is an anonymous third-party phone survey of parents located within or near a community. Families are polled on their opinion of the current school offering their child attends (if applicable), key factors of greatest importance for their child's education, and likelihood of enrolling their child in a new school.

Although the survey is just one tool to understand the feasibility of and support for a new school, it provides tremendous insight from the most critical stakeholders in a school community.

Process to Conduct Surveys: Surveys must be anonymously conducted to generate the most honest feedback. NHA contracts with a third-party research organization to contact and speak with families within and/or near a community.

The contracted research firm attempts to reach a statistically significant number of families via cell phone (as noted at top of survey) who live within a radius (typically eight to ten miles) of a specified address point. Surveyors then pose a series of questions geared at understanding the priorities noted above.

Notable Questions: As described, questions asked aim to understand whether families are currently satisfied with the schools available to their children, why they are or not satisfied, key factors in choosing a school, and the likelihood of attending a new school.

Some of the specific questions include:

- What do you think of the quality of education that your child is receiving at the school they attend, is it great, good, average, poor, or terrible?
- Many parents say that academic performance is one of the most important things for a school to offer. What is the NEXT most important thing for you in a school?
- What issue would cause you to take your child out of their current school?
- Charter schools are tuition-free, public schools open to all students. If a new Kindergarten through eighth grade charter school opened in your area that had college-readiness as its

focus, how likely will you be to send your child to that school? Will you be very likely, likely, not very likely, or not at all likely to send your child to that school?

Key Benchmark: A significant indicator of parent demand for a new school – specifically a charter school – is a parent or guardian has to make the choice to enroll their student in one.

With this in mind, question eleven on the enclosed survey measures the likelihood that a parent will enroll their student in a new school if it were to open within the community. Based on historical context, a school partnering with NHA is likely to meet or exceed its initial target enrollment if at least 30 percent of respondents answer “very likely” or “likely” to this question.

Franklin Findings: A Franklin-specific survey was conducted between April 3-7, 2025. A third-party research firm made contact and polled 72 parents living in Franklin County.

Related to the key benchmark and notable questions previously explained, some significant findings were revealed:

- 46 percent of families indicated they are satisfied with the quality of education at their child’s current school.
- Beyond academic performance, 22 percent of those surveyed indicated college preparation as their next most important factor in choosing a school.
- Despite high satisfaction with their child’s current school, 51 percent of respondents would consider sending their child to a new charter school in the community (30 percent benchmark – Franklin survey among the highest likelihoods of all surveys conducted).

Based on these topline findings, it is likely that there is both a demand and need for a new school to be located within Franklin County.

Additional Support: National Heritage Academies has begun acquiring additional leads from interested families across our attendance zone. These families have requested additional information through both the Carolina Scholars Academy landing page and targeted Facebook ads.



410 Clarendon
 East Lansing MI 48823
 517-295-5325
www.Dennoresearch.com

**Survey of Parents in
 Franklin, NC
 Thursday, April 3rd -Monday, April 7th, 2025
 72 completions
 100% by cell phone**

Hello, this is _____ and I am conducting a research study of your community. This is NOT a sales call, you will not be asked for a donation and you will not be called again because you participated in this survey. This is strictly research and I'd like to take a few minutes to include the opinions of your household.

1. Before we begin, I'd like to confirm that you have at least one child in Kindergarten to 8th grade in a nearby school, or that you will have a child

<u>attending kindergarten in the next two years</u>	<u>Number</u>	<u>Percent</u>
YES-CONTINUE	72	100.0 %
NO-1=ASK FOR SOMEONE THAT HAS A CHILD AGED 3-10 -IF NOT AVAILABLE		
<u>TERMINATE</u>	<u>0</u>	<u>0.0 %</u>
Total	72	100.0 %

2. What do you think of the quality of education that your child is receiving at the school they attend, is it great, good, average, poor, or terrible?

	<u>Number</u>	<u>Percent</u>
1. Great	14	19.4 %
2. Good	19	26.4 %
3. Average	18	25.0 %
4. Poor	9	12.5 %
5. Terrible	8	11.1 %
6. Other/Unsure/Do Not Know (DO NOT OFFER)	4	5.6 %
Total	72	100.0 %

TOTAL POSITIVE	33	46%
TOTAL NEGATIVE	17	24%

3. What do you think is the level of quality of public education provided in the district overall, is it great, good, average, poor, or terrible?

	Number	Percent
1. Great	8	11.1 %
2. Good	16	22.2 %
3. Average	22	30.6 %
4. Poor	16	22.2 %
5. Terrible	7	9.7 %
6. Other/Unsure/Do Not Know (DO NOT OFFER)	3	4.2 %
Total	72	100.0 %

TOTAL POSITIVE	24	33%
TOTAL NEGATIVE	23	32%

4. How good of a job does your current school do at focusing in on individual instruction for your child, do they do a great, good, average, poor, or terrible job? (more than one answer acceptable because they might have more than one kid at a school)

	Number	Percent
1. Great	13	18.1 %
2. Good	24	33.3 %
3. Average	15	20.8 %
4. Poor	11	15.3 %
5. Terrible	5	6.9 %
6. Other/Unsure/Do Not Know (DO NOT OFFER)	5	6.9 %
Total	73	

TOTAL POSITIVE	37	51%
TOTAL NEGATIVE	16	22%

5. Many parents say that academic performance is one of the most important things for a school to offer. What is the NEXT most important thing for you in a school, is it (ROTATE) (respondent may pick ONLY ONE response)

	Number	Percent
1. Extracurricular activities--like sports	17	23.6 %
2. Class size	17	23.6 %
3. College preparatory curriculum	16	22.2 %
4. Moral focus	7	9.7 %
5. School safety	11	15.3 %
6. Other/Unsure/Do Not Know (DO NOT OFFER)	4	5.6 %
Total	72	100.0 %

6. What issue would cause you to take your child out of their current school? (OPEN ENDED)

	Number	Percent
Lack of discipline.	1	1.4 %
Class size.	1	1.4 %
Safety.	7	9.7 %
Lack of challenge for students.	1	1.4 %
The lack of extracurricular.	1	1.4 %

Nothing, they're home schooled.	1	1.4 %
Don't know.	3	4.2 %
If there was an income issue between me and the schools.	1	1.4 %
Teaching my child topics I do not agree with.	1	1.4 %
Poor academic performance.	1	1.4 %
Child not feeling comfortable in their schools.	1	1.4 %
If they continue to lose teachers.	1	1.4 %
Them not being able to meet special needs requirements.	1	1.4 %
Too many kids in one classroom.	1	1.4 %
The level of care that teachers have for each child is different.	1	1.4 %
Curriculum that goes against what I believe in.	1	1.4 %
If we moved.	1	1.4 %
Classroom size.	1	1.4 %
Doing poorly.	1	1.4 %
A better school that was offered that's closer.	1	1.4 %
The politics of the school.	1	1.4 %
None.	5	6.9 %
Unfairness from teachers and dishonesty.	1	1.4 %
Teachers being neglectful of my child.	1	1.4 %
Obedience.	1	1.4 %
Bullying.	7	9.7 %
If they felt unsafe.	1	1.4 %
If teachers weren't doing a good job teaching the kids and enforcing rules.	1	1.4 %
Safety issues.	2	2.8 %
If schools can't meet academic requirements.	1	1.4 %
No change in education.	1	1.4 %
Quality of instruction.	1	1.4 %
Staff support.	1	1.4 %
Teachers dealing with students.	1	1.4 %
Not teaching them to read.	1	1.4 %
They don't teach the basics and have constant subs.	1	1.4 %
Disruptions.	1	1.4 %
We are happy where we're at.	1	1.4 %
Nothing, stuff happens and nobody's perfect.	1	1.4 %
Forceful agenda.	1	1.4 %
Moral focus is out of line.	1	1.4 %
Social issues like bullying.	1	1.4 %
The quality of education.	1	1.4 %
If they started talking about transgender stuff.	1	1.4 %
Not providing for or accommodating my child's needs.	1	1.4 %
Bullying or disrespect from teachers.	1	1.4 %
What they're being taught as opposed to what they'll use.	1	1.4 %
The demoralization of the values taught in the school system.	1	1.4 %
Safety at school.	2	2.8 %
If they teach things that they shouldn't.	1	1.4 %
If they changed their curriculum at the school.	1	1.4 %

Safety concerns.	1	1.4 %
Total	72	100.0 %

7. (If they used the word “safety” “safe” or “unsafe” in Q6, ask them) (OPEN ENDED) In the last question you expressed concern over safety. I was wondering if you could elaborate on what exactly your concern is."

	Number	Percent
Too many students means a lack of individual focus.	1	7.7 %
If my child said there was a lot of drug use.	1	7.7 %
Emotional intelligence or anger issues.	1	7.7 %
Poor leadership from teachers.	1	7.7 %
Increase in fights.	1	7.7 %
School shooting.	1	7.7 %
Bullying by teachers.	1	7.7 %
If any issues of physical safety were to arise.	1	7.7 %
I wouldn't want my kid targeted by other kids.	1	7.7 %
The security of the school.	1	7.7 %
They should have security guards at the school, so if it got too bad I'd take them out.	1	7.7 %
The wrong people in the school.	1	7.7 %
Bullying.	1	7.7 %
Total	13	100.0 %

8. Which elementary or middle school is your child or children currently attending now? [open ended question-more than one answer acceptable because they might have more than one child at the school]

	Number	Percent
Wake Elementary.	1	1.4 %
Wake Prep Academy.	2	2.8 %
Youngsville Elementary.	2	2.8 %
White Prep School.	1	1.4 %
Wake Forest Charter.	1	1.4 %
East Wake Academy.	1	1.4 %
Home schooled.	3	4.2 %
Crossroads Christian K-12.	1	1.4 %
Jones Dairy Elementary.	1	1.4 %
Roseville Charter Academy.	1	1.4 %
Long Mill Elementary.	3	4.2 %
Southern Nash Middle School.	1	1.4 %
Henderson Collegiate K-12 School.	1	1.4 %
Wake Preparatory Academy.	2	2.8 %
Jamestown Middle School.	1	1.4 %
Penn Griffith Middle School.	1	1.4 %
Louisburg Public Elementary.	1	1.4 %
Refused.	12	16.7 %
Falls Lake Academy.	2	2.8 %
Youngsville Academy.	1	1.4 %
Commission Leadership Academy.	1	1.4 %
Young Glade Academy.	1	1.4 %
Sandy Ridge Elementary.	1	1.4 %

Wake Forest Elementary.	1	1.4 %
Selma Elementary.	1	1.4 %
Laurel Elementary.	2	2.8 %
Edward Best Elementary.	2	2.8 %
Lake Preparatory Academy.	1	1.4 %
Voyager Academy.	1	1.4 %
Franklin Academy.	1	1.4 %
Hickory Grove Sharon Elementary.	1	1.4 %
Terrel Lane Middle School.	2	2.8 %
Louisburg Elementary.	1	1.4 %
Marsh Pointe Elementary.	1	1.4 %
Coastal Middle Schools.	1	1.4 %
St Francis Catholic.	1	1.4 %
Ceder Creek Middle School.	1	1.4 %
Youngsville Academy Charter School.	1	1.4 %
Wake Preparatory Middle School.	1	1.4 %
Royal Elementary.	1	1.4 %
Wake Preparatory Elementary.	1	1.4 %
Margarette Dollard Middle School.	1	1.4 %
Davidson Elementary.	1	1.4 %
Albemarle Private School.	1	1.4 %
Brookeside Private Middle School.	1	1.4 %
Laurel Mill Elementary.	1	1.4 %
Steele Creek Preparatory Academy.	1	1.4 %
Crossroads Christian School.	1	1.4 %
Bunn Middle School.	2	2.8 %
Roseville Elementary.	1	1.4 %
Invision Science Academy.	1	1.4 %
Cedar Spring.	1	1.4 %
West Oxford Elementary.	1	1.4 %
Total	76	

9. What is your perception of charter schools, is it great, good, average, poor, or terrible?

	Number	Percent
1. Great	15	20.8 %
2. Good	22	30.6 %
3. Average	16	22.2 %
4. Poor	3	4.2 %
5. Terrible	2	2.8 %
6. Other/Unsure/DNK (DO NOT OFFER)	14	19.4 %
Total	72	100.0 %

TOTAL POSITIVE	37	52%
TOTAL NEGATIVE	5	7%

10. When you hear “charter school,” what comes to mind?

	Number	Percent
They go to one, there's parent involvement.	1	1.4 %
School of choice.	2	2.8 %
The strict structure of it, no individuality.	1	1.4 %

Above average school.	1	1.4 %
Options geared towards individualized education.	1	1.4 %
Still public but provide a better education.	1	1.4 %
Don't know.	4	5.6 %
Better than public schools.	1	1.4 %
School that takes from public funding.	1	1.4 %
More attention to each child's needs.	1	1.4 %
Taking tax dollars from public schools.	1	1.4 %
Not for my child due to a bad experience.	1	1.4 %
Expensive.	1	1.4 %
An alternative to public schools.	1	1.4 %
Publicly funded for profit school.	1	1.4 %
Better care for students with one on one.	1	1.4 %
Free academics.	1	1.4 %
Non public school.	1	1.4 %
College prep.	2	2.8 %
Happiness since it's better for the community.	1	1.4 %
Less Individual Education Programs.	1	1.4 %
Better quality with smaller classes.	1	1.4 %
It's funded differently.	1	1.4 %
Nothing.	1	1.4 %
Semi-private school.	1	1.4 %
More parental involvement and less distractions.	1	1.4 %
Private school.	3	4.2 %
Wearing uniforms.	1	1.4 %
Academic excellence.	1	1.4 %
Another option for parents.	1	1.4 %
Not as good as what it seems.	1	1.4 %
To segregate children.	1	1.4 %
Choice and options.	1	1.4 %
Small student/teacher ratios.	1	1.4 %
Terrible.	1	1.4 %
A little more challenging academically.	1	1.4 %
Taking funds.	1	1.4 %
Personalized education.	1	1.4 %
Free tuition with smaller classes.	1	1.4 %
Kids learn and parents help.	1	1.4 %
Better overall environment for my children.	1	1.4 %
Rich snobby people.	1	1.4 %
We already attend a charter school.	1	1.4 %
Better than public.	1	1.4 %
Not private, not public.	1	1.4 %
Good school.	1	1.4 %
Good quality education.	1	1.4 %
A little step above public schools.	1	1.4 %
Terrific education.	1	1.4 %
People who have money to send them there.	1	1.4 %
Rich people.	1	1.4 %
Better paid teachers.	1	1.4 %
Sub par, an absolute Ponzi scheme.	1	1.4 %
No inclusiveness.	1	1.4 %
More personal teaching.	1	1.4 %

Robbery.	1	1.4 %
Kids that don't go to public schools.	1	1.4 %
Smaller classes.	1	1.4 %
Carpool.	1	1.4 %
Smaller class sizes and instruction focused on math and science.	1	1.4 %
I prefer public schools I don't know much about charter.	1	1.4 %
Discipline and more structure.	1	1.4 %
More focused education.	1	1.4 %
A better education.	1	1.4 %
Values commitment to education.	1	1.4 %
Total	72	100.0 %

11. Charter schools are tuition-free, public schools open to all students. If a new Kindergarten through eighth grade charter school opened in your area that has college-readiness as its focus, how likely will you be to send your child to that school? Will you be very likely, likely, not very likely, or not at all likely to send your child to that school?

	Number	Percent
1. Very likely (go to q. 13)	14	19.4 %
2. Likely (go to q. 13)	23	31.9 %
3. Not very likely (go to q. 12)	12	16.7 %
4. Not at all likely (go to q. 12)	21	29.2 %
5. Other/Unsure/Do Not Know (DO NOT OFFER) (go to q. 12)	2	2.8 %
Total	72	100.0 %

TOTAL LIKELY	37	51%
TOTAL NOT LIKELY	33	46%

12. What information would you need to seriously consider sending your child to this charter school? [open ended] (GO TO Q. 13)

	Number	Percent
Background history of the founders/owners.	1	2.9 %
I'd need to know if it's K-12 because I don't like that.	1	2.9 %
Nothing, his charter school is great.	1	2.9 %
Track record of people involved in running the school.	1	2.9 %
None.	9	25.7 %
If there's a band program there.	1	2.9 %
Don't know.	3	8.6 %
That they had a low turn over, seasoned teachers, and a seasoned school.	1	2.9 %
Nothing.	4	11.4 %
Actual numbers that show that schools will do better.	1	2.9 %
Better services for students.	1	2.9 %
I wouldn't change schools.	1	2.9 %
No information.	1	2.9 %
If they have a special needs class.	1	2.9 %
We won't be sending them there.	1	2.9 %
It has to be conveniently placed.	1	2.9 %

No information will be needed since I will not send them to a charter school.	1	2.9 %
The focus of their curriculum, I'd also need to chat with the curriculum director and see how the charter school was set up.	1	2.9 %
Information about the teaching.	1	2.9 %
The class sizes.	1	2.9 %
I'd need to see the school, meet the teachers, and discuss focus of classes.	1	2.9 %
<u>Nothing, not all kids go to college.</u>	<u>1</u>	<u>2.9 %</u>
Total	35	100.0 %

13. A new charter school may be coming to your community. If this new charter school opened, would you like to be contacted with

<u>further information about the school?</u>	<u>Number</u>	<u>Percent</u>
1. Yes (go to q 14)	20	27.8 %
2. No (go to q15)	51	70.8 %
<u>3. Other/Unsure/DNK (DO NOT OFFER go to q 15)</u>	<u>1</u>	<u>1.4 %</u>
Total	72	100.0 %

15. (ASK OF ALL) I would now like to ask you some questions for statistical purposes only. This information will not be shared or used to identify you. Where do you obtain your main source of news about local education issues? Is it the TV, radio, newspaper, Internet and social media, school newsletter, or friends and family?

<u>(one response only)</u>	<u>Number</u>	<u>Percent</u>
1. TV	4	5.6 %
2. Radio	0	0.0 %
3. Newspaper	2	2.8 %
4. Internet and social media	37	51.4 %
5. School newsletter	9	12.5 %
6. Friends and family	14	19.4 %
<u>7. Other/Unsure/DNK (DO NOT ASK)</u>	<u>6</u>	<u>8.3 %</u>
Total	72	100.0 %

16. What is your race-do you consider yourself African-American, Hispanic/Latino, White, Asian, or some other race?

	<u>Number</u>	<u>Percent</u>
1. African-American	8	11.1 %
2. White	51	70.8 %
3. Hispanic/Latino	3	4.2 %
4. Asian	2	2.8 %
<u>5. Other/Do Not Know (DO NOT OFFER)</u>	<u>8</u>	<u>11.1 %</u>
Total	72	100.0 %

17. Gender of Respondent (DO NOT ASK
DETERMINE FROM CONVERSATION)

	Number	Percent
1. Male	31	43.1 %
2. Female	41	56.9 %
Total	72	100.0 %

18. Landline or cell? (DO NOT ASK DETERMINE FROM LIST)

	Number	Percent
1. Landline	0	0.0 %
2. Cell	72	100.0 %
Total	72	100.0 %

This survey was conducted by Denno Research. 72 parents living in the following zip codes: 27596, 27525 and 27549 were surveyed from April 3-7, 2025. All numbers are rounded and therefore may not equal 100%.



Appendix B: Curriculum Outline per Grade Span (For Each Grade Span the School Will Ultimately Serve)

Carolina Scholars Academy

Synopsis of Planned Curriculum

Carolina Scholars Academy will utilize the K-8 curriculum designed for NHA-partner schools which has been carefully aligned with the state standards. The school's core content areas of English language arts (ELA), mathematics, science, and social studies, summarized very briefly below, will be supplemented by co-curricular areas that help shape students as well-rounded individuals, including art, music, physical education, and library and educational technology. Moral focus, too, will be an integrated component of the curriculum.

ELA: In grades K-2, the curriculum will emphasize the foundations of reading. This includes the ability to decode automatically, read with fluency, and gain the capacity to comprehend increasingly complex texts across a range of types and disciplines. Student literacy will be promoted through rich, domain-specific content in a variety of fiction and nonfiction texts, including a true balance of informational and literary genres. In grades 3-5, reading instruction will focus on complex, grade-appropriate texts to prepare students for the complexity of materials they must study to become college- and career-ready. Reading instruction will feature a balance of informational and literary work. In grades 6-8, ELA, social studies, and science teachers will offer literary experiences in their content areas, using materials chosen specifically for their literacy value. The middle school curriculum will include a blend of classic literature and literary nonfiction, including substantial exposure to historical and scientific documents.

Math: The math curriculum underscores the importance of number sense and operations, measurement, computation using formal algorithms, geometry, data analysis and probability, and problem-solving and inquiry. It follows the state standards for math. In grades K-2, number sense and computational fluency will be the main focus of students' learning. In grades 3-5, learning will shift from computation to fractional awareness. The ability to compose and decompose numbers will be built upon to deepen understanding of fractions, percentages, decimals, and computation. Algebraic skills will also be developed. In grades 6-8, the focus will be on the study of algebra and functions.

Science: In grades K-2, the content of the science curriculum focuses on scientific inquiry and engineering designs primarily through the study of events and phenomena in nature. In grades 3-5, the science curriculum directs students to begin exploring the science and engineering practices, crosscutting concepts, and engineering design solutions by making connections between events. In grades 6-8, the curriculum includes further exploration of the relationships between science and engineering practices and crosscutting concepts while also connecting knowledge of scientific concepts to real world examples and solidifying congruence between students' understanding of phenomena to that of the scientific community.

Social Studies: The social studies curriculum emphasizes how geography and economics interact in a global society and follows the state standards for social studies. In grades K-2, the curriculum will focus on students' ability to describe basic historical events, people, and conflicts. They will begin to understand their own culture by studying examples of their community and school, and places around the world. Students will become familiar with basic geographical representations, economic concepts and resources, and functions of government. In grades 3-5, the curriculum will help students describe historical events in more detail. They will also be able to communicate how these events impacted other historical occurrences. In grades 6-8, students will practice connecting events in U.S. and world history with current events and learn about relationships among geography, history, economics, and culture.



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North Carolina 1st Grade ELA Year at-a-Glance

[K-2 Time Structures](#)
 [Sound Spelling Cards](#)
 [Foundational Skills Scope & Sequence](#)
[Assessment Resources](#)
 [Video Bank](#)
 [FP2R K-2 Handbook](#)
[Habits of Discussion](#)
[Intervention](#)

Week	Phonological Awareness / Phonics	RA / SR	Writing
0	Teach & Practice Classroom Culture, Routines, and Procedures		
1	Heggerty Week 1 From Phonics Lesson 1 <ul style="list-style-type: none"> ● Sound Spelling Introduction: Short a ● Cumulative Assessment: Group 1 	Unit 1 RA/SR Scope and Sequence: Falling in Love with Reading! <ul style="list-style-type: none"> ● Primary Standards: RL.1.1, RL.1.2, RL.1.4, RL.1.5 ● Review Standards: N/A 	Unit 0 Writing Scope and Sequence: Constructed Response Writing <ul style="list-style-type: none"> ● Writing Standards: W.1.2b, W.1.6 ● Language Standards: RF.1.2, L.1.2
2	Heggerty Week 2 From Phonics Lesson 2 <ul style="list-style-type: none"> ● Sound Spelling Introduction: Short i ● Cumulative Assessment: Group 2 		
3	Heggerty Week 3 From Phonics Lesson 3 <ul style="list-style-type: none"> ● Sound Spelling Introduction: Short o ● Cumulative Assessment: Group 3 		
4	Heggerty Week 4 From Phonics Lesson 4 <ul style="list-style-type: none"> ● Sound Spelling Introduction: Short u ● Cumulative Assessment: Group 4 		
5	Heggerty Week 5 From Phonics Lesson 5 <ul style="list-style-type: none"> ● Sound Spelling Introduction: Short e ● Cumulative Assessment: Group 1 		Unit 1 Writing Scope and Sequence: All About Me <ul style="list-style-type: none"> ● Writing Standards: W.1.2, W.1.2b, W.1.5, W.1.6, SL.1.1 ● Language Standards: RF.1.2, L.1.2

6	<p>Heggerty Week 6 From Phonics Lesson 6</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: l-Blends ● Cumulative Assessment: Group 2 	<p><u>Unit 2 RA/SR Scope and Sequence:</u> Story Elements</p> <ul style="list-style-type: none"> ● Primary Standards: RL.1.1, RL.1.3, RL.1.6, RL.1.10 ● Review Standards: RL.1.1, RL.1.5, RL.1.7, RL.1.3 	<p><u>Unit 2 Writing Scope and Sequence:</u> Small Moments</p> <ul style="list-style-type: none"> ● Writing Standards: W.1.3, W.1.3b, W.1.6, SL.1.1 ● Language Standards: RF.1.2, L.1.1, L.1.2
7	<p>Heggerty Week 7 From Phonics Lesson 7</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: s-Blends ● Cumulative Assessment: Group 3 		
8	<p>Heggerty Week 8 From Phonics Lesson 8</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: r-Blends ● Cumulative Assessment: Group 4 		
9	<p>Heggerty Week 9 From Phonics Lesson 9</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Digraphs (sh, th) ● Cumulative Assessment: Group 1 		
10	<p>Heggerty Week 10 From Phonics Lesson 10</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Digraphs (ch, tch, wh) ● Cumulative Assessment: Group 2 		
11	<p>Heggerty Week 11 From Phonics Lesson 11</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Digraphs (ng, nk) ● Cumulative Assessment: Group 3 		

12	<p>Heggerty Week 12 From Phonics Lesson 12</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Final e (a_e, i_e) ● Cumulative Assessment: Group 4 	<p><u>Unit 3 RA/SR Scope and Sequence:</u> Reading to Learn!</p> <ul style="list-style-type: none"> ● Primary Standards: RI.1.1, RI.1.2, RI.1.5, RI.1.6, RI.1.7, RI.1.8, RI.1.9, RI.1.10 ● Review Standards: RI.1.1, RI.1.2, RI.1.4 	<p><u>Unit 3 Writing Scope and Sequence:</u> What I Like</p> <ul style="list-style-type: none"> ● Writing Standards: W.1.1, W.1.1b, W.1.6, SL.1.1 ● Language Standards: RF.1.2, L.1.1, L.1.2
13	<p>Heggerty Week 13 From Phonics Lesson 13</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Final e (o_e, u_e, e_e) ● Cumulative Assessment: Group 1 		
14	<p>Heggerty Week 14 From Phonics Lesson 14</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Single Letter Long Vowels (e, i, o) ● Cumulative Assessment: Group 2 		
15	<p>Heggerty Week 15 From Phonics Lesson 15</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Long a (ai, ay) ● Cumulative Assessment: Group 3 		
16	<p>Heggerty Week 16 From Phonics Lesson 16</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Long e (ee, ea) ● Cumulative Assessment: Group 4 		
17	<p>Heggerty Week 17 From Phonics Lesson 17</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Long o (oa, ow) ● Cumulative Assessment: Group 1 		

18	<p>Heggerty Week 18 From Phonics Lesson 18</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Long i (y, igh) ● Cumulative Assessment: Group 2 	<p><u>Unit 4 RA/SR Scope and Sequence:</u> Getting to Know the Characters</p> <ul style="list-style-type: none"> ● Primary Standards: RL.1.2, RL.1.3, RL.1.10 ● Review Standards: RL.1.1, RL.1.2, RL.1.7 	<p><u>Unit 4 Writing Scope and Sequence:</u> Solving Problems</p> <ul style="list-style-type: none"> ● Writing Standards: W.1.3, W.1.3b, W.1.6, SL.1.1 ● Language Standards: L.1.1, L.1.2
19	<p>Heggerty Week 19 From Phonics Lesson 19</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Long u (u, ew, ue) ● Cumulative Assessment: Group 3 		
20	<p>Heggerty Week 20 From Phonics Lesson 20</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: r-Controlled (ar) ● Cumulative Assessment: Group 4 		
21	<p>Heggerty Week 21 From Phonics Lesson 21</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: r-Controlled (er, ir, ur) ● Cumulative Assessment: Group 1 		
22	<p>Heggerty Week 22 From Phonics Lesson 22</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: r-Controlled (or, ore, oar) ● Cumulative Assessment: Group 2 		
23	<p>Heggerty Week 23 From Phonics Lesson 23</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Short oo and Long oo ● Cumulative Assessment: Group 3 		

24	<p>Heggerty Week 24 From Phonics Lesson 24</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Diphthong (ou, ow) ● Cumulative Assessment: Group 4 		
25	<p>Heggerty Week 25 From Phonics Lesson 25</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Diphthong (oi, oy) ● Cumulative Assessment: Group 1 	<p>Unit 5 RA/SR Scope and Sequence: Biographies</p> <ul style="list-style-type: none"> ● Primary Standards: RI.1.1, RI.1.3, RI.1.8, RI.1.10 ● Review Standards: RI.1.2, RI.1.8 	<p>Unit 5 Writing Scope and Sequence: Sharing Questions</p> <ul style="list-style-type: none"> ● Writing Standards: W.1.1, W.1.1b, W.1.6, SL.1.1 ● Language Standards: L.1.1, L.1.2
26	<p>Heggerty Week 26 From Phonics Lesson 26</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Complex Vowel (au, aw, alk, alt, all) ● Cumulative Assessment: Group 2 		
27	<p>Heggerty Week 27 From Phonics Lesson 27</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: r-Controlled (are, air, ear) ● Cumulative Assessment: Group 3 		
28	<p>Heggerty Week 28 From Phonics Lesson 28</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Long i (ild, ind), Long o (old) ● Cumulative Assessment: Group 4 		
29	<p>Heggerty Week 29 From Phonics Lesson 29</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Long i (ie), Long o (oe) ● Cumulative Assessment: Group 1 	<p>Unit 6 RA/SR Scope and Sequence: Comparing Characters</p> <ul style="list-style-type: none"> ● Primary Standards: RL.1.9, RL.1.10 ● Review Standards: RL.1.1, RL.1.3, RL.1.7 	<p>Unit 6 Writing Scope and Sequence: Creating Characters</p> <ul style="list-style-type: none"> ● Writing Standards: W.1.3, W.1.3b, W.1.6, SL.1.1 ● Language Standards: L.1.1, L.1.2

30	<p>Heggerty Week 30 From Phonics Lesson 30</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: Long e (y, ey, ie) ● Cumulative Assessment: Group 2 		
31	<p>Heggerty Week 31 From Phonics Review</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: n/a ● Cumulative Assessment: Group 3 (Use Week 30 Cumulative Assessment) 		
32	<p>Heggerty Week 32 From Phonics Review</p> <ul style="list-style-type: none"> ● Sound Spelling Introduction: n/a ● Cumulative Assessment: Group 4 (Use Week 30 Cumulative Assessment) 		
33	Review		
34			

SAMPLE



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North Carolina 4th Grade ELA Year at-a-Glance

		Lesson Prep Resources	Time Structures	Assessment Resources
		Video Bank	Habits of Discussion	Intervention
Week	RA / SR	Writing		
0	Classroom Culture, Routines and Procedures			
1	Unit 1 RA/SR Scope and Sequence:	Unit 0 Writing Scope and Sequence:		
2	What a Character!	Constructed Response Writing		
3	<ul style="list-style-type: none"> Narrative Standards: RL.4.1, RL.4.2, RL.4.3, RL.4.4, RL.4.5, RL.4.6 	<ul style="list-style-type: none"> Writing Standards: W.4.2 Language Standards: L.4.1, L.4.2, L.4.3, L.4.3a 		
4	<ul style="list-style-type: none"> Review Standards: RL.4.1, RL.4.3, RL.4.4, RL.4.5, 	Unit 1 Writing Scope and Sequence:		
5		Small Moments		
6		<ul style="list-style-type: none"> Writing Standards: W.4.3, W.4.3a, W.4.3b, W.4.3c, W.4.3e, W.4.3f, W.4.3g, W.4.6, Language Standards: L.4.1, L.4.2, L.4.3, L.4.3a, L.4.3b, 		
7	Unit 2 RA/SR Scope and Sequence:	Unit 2 Writing Scope and Sequence:		
8	A Hodgepodge of Information	Harlem Renaissance		
9	<ul style="list-style-type: none"> Informational Standards: RI.4.1, RI.4.2, RI.4.4, RI.4.6, RI.4.7, RI.4.8, RI.4.9, RI.4.10 	<ul style="list-style-type: none"> Writing Standards: W.4.2, W.4.2a, W.4.2b, W.4.2c, W.4.2d, W.4.2e, W.4.2f, W.4.2g, W.4.4, W.4.5, W.4.6, Language Standards: L.4.1, L.4.2 		
10	<ul style="list-style-type: none"> Review Standards: RI.4.1, RI.4.2, RI.4.4, RI.4.7 			
11				
12				
13	Unit 3 RA/SR Scope and Sequence:	Unit 3 Writing Scope and Sequence:		
14	The World of Folklore	Writing About Reading Part 1		
15	<ul style="list-style-type: none"> Narrative Standards: RL.4.1, RL.4.2, RL.4.3, RL.4.5, RL.4.7, RL.4.9, RL.4.10 	<ul style="list-style-type: none"> Writing Standards: W.4.2, W.4.2a, W.4.2b, W.4.2c, W.4.2d, W.4.2e, W.4.2f, W.4.2g, W.4.3, W.4.3a, W.4.6, Language Standards: L.4.1, L.4.2, L.4.3, L.4.3a, L.4.3c, 		
16	<ul style="list-style-type: none"> Review Standards: RL.4.1, RL.4.3, RL.4.4, RL.4.9 			
17	Unit 4 RA/SR Scope and Sequence:			
18	Inventions			
19	<ul style="list-style-type: none"> Informational Standards: RI.4.1, RI.4.2, RI.4.3, RI.4.5, RI.4.10 			
20	<ul style="list-style-type: none"> Review Standards: RI.4.1, RI.4.2, RI.4.3, RI.4.4, RI.4.5, RI.4.7 			
21				
22				

24	Unit 5 RA/SR Scope and Sequence: The	Unit 4 Writing Scope and Sequence:
25	Magic of Poetry	Conservation
26	<ul style="list-style-type: none"> ● Narrative Standards: RL.4.1, RL.4.2, RL.4.4, RL.4.5, RL.4.9, RL. 4.10 	<ul style="list-style-type: none"> ● Writing Standards: W.4.1, W.4.1a, W.4.1b, W.4.1c, W.4.1d, W.4.4, W.4.5, W.4.7, W.4.8, W.4.9, W.4.10
27	<ul style="list-style-type: none"> ● Review Standards: RL.4.1,, RL.4.2, RL.4.5, 	<ul style="list-style-type: none"> ● Language Standards: L.4.1, L.4.1b, L.4.1c, L.4.1d, L.4.1e, L.4.1f, L.4.1g, L.4.2, L.4.2a, L.4.2b, L.4.3, L.4.3a, L.4.3b, ●
28	Unit 6 RA/SR Scope and Sequence:	Unit 5 Writing Scope and Sequence: Writing
29	Civil Rights	About Reading Part 2
30	<ul style="list-style-type: none"> ● Narrative Standards: RL.4.1, RL.4.3, RL.4.5, RL. 4.10 	<ul style="list-style-type: none"> ● Writing Standards: W.4.2, W.4.2a, W.4.2b, W.4.2c, W.4.2d, W.4.2e, W.4.2f, W.4.2g, W.4.4, W.4.6,
31	<ul style="list-style-type: none"> ● Review Standards: RL.4.1, 	<ul style="list-style-type: none"> ● Language Standards: L.4.1, L.4.2, L.4.3, L.4.3a, L.4.3b,
32		
33		
34		



You must be signed in to your NHA Google Account to access the links below.

North Carolina 7th Grade ELA Year at-a-Glance

[Lesson Prep Resources](#) [Time Structures](#) [Assessment Resources](#)
[Video Bank](#) [Habits of Discussion](#) [Intervention](#) [Independent Reading](#)

Week	Literature Seminar	Writing
0	Classroom Culture, Routines and Procedures	
1	Unit 1 Lit. Seminar Scope and Sequence: Short Stories	Unit 1 Writing Scope and Sequence: Constructed Response Writing
2	<ul style="list-style-type: none"> ● Primary Standards: RL.7.1, RL.7.2, 7.RL.2.3, RL.7.6 ● Additional Standards: RL.7.4, L.7.4, L.7.5, SL.7.2 	<ul style="list-style-type: none"> ● Primary Standards: W.7.4, W.7.9, L.7.2 ● Additional Standards: W.7.2c, W.7.3c
3	EXCEL-erate Unit 1 Extensions	
4	Unit 2 Lit. Seminar Scope and Sequence: I Am Malala	Unit 2 Writing Scope and Sequence: Informational/Research
5		
6	<ul style="list-style-type: none"> ● Primary Standards: RI.7.2, RI.7.3, RI.7.6 ● Additional Standards: RI.7.1, RI.7.4, RI.7.9, L.7.4, L.7.5, SL.7.2 	<ul style="list-style-type: none"> ● Primary Standards: W.7.2, W.7.2a, W.7.2b, W.7.2d, L.7.2, L.7.2a ● Additional Standards: W.7.4, W.7.5, W.7.8, W.7.10, SL.7.2, SL.7.4, SL.7.5, SL.7.6
7		
8	EXCEL-erate Unit 2 Extensions	
9		
10	Unit 3 Lit. Seminar Scope and Sequence: The Outsiders	Unit 3 Writing Scope and Sequence: Personal Narrative
11	<ul style="list-style-type: none"> ● Primary Standards: RL.7.2, RL.7.3, RL.7.5, RL.7.6 ● Additional Standards: RL/RI.7.1, RI.7.2, RI.7.6, RL.7.4, L.7.4, L.7.5 	<ul style="list-style-type: none"> ● Primary Standards: W.7.3, W.7.3b, W.7.3d, L.7.1a ● Additional Standards: W.7.4, W.7.6, SL.7.2, SL.7.6
12		
13	EXCEL-erate Unit 3 Extensions	
14		
15	Unit 4 Lit. Seminar Scope and Sequence: Hitler Youth	Unit 4 Writing Scope and Sequence: Argument
16	<ul style="list-style-type: none"> ● Primary Standards: RI.7.3, RI.7.5, RI.7.8 ● Additional Standards: RI/RL.7.1, RI.7.4, RI.7.6, RI.7.9, RL.7.2, RL.7.4, SL.7.2, SL.7.3, L.7.4, L.7.5 	<ul style="list-style-type: none"> ● Primary Standards: W.7.1, W.7.1a, W.7.1b, L.7.1b ● Additional Standards: W.7.4, W.7.5, W.7.8, W.7.10, SL.7.4, SL.7.6
17		
18		
19	EXCEL-erate Unit 4 Extensions	
20		

21	<u>Unit 5 Lit. Seminar Scope and Sequence:</u> The Diary of Anne Frank	<u>Unit 5 Writing Scope and Sequence:</u> Drama
22	<ul style="list-style-type: none"> ● Primary Standards: RL.7.2, RL.7.3, RL.7.5 ● Additional Standards: RL.7.1/RI.7.1, RL.7.7, RI.7.2, RI.7.6, RI.7.7, L.7.4, L.7.5 	<ul style="list-style-type: none"> ● Primary Standards: W.7.3, W.7.3b, W.7.3d, L.7.1b, L.7.3 ● Additional Standards:W.7.4, W.7.5, SL.7.5, SL.7.6
23	<u>EXCEL-erate Unit 5 Extensions</u>	
24	<u>Unit 6 Lit. Seminar Scope and Sequence:</u> Brown Girl Dreaming	<u>Unit 6 Writing Scope and Sequence:</u> Poetry
25	<ul style="list-style-type: none"> ● Primary Standards: RL.7.2, RL.7.4, RL.7.5 ● Additional Standards: RL/RI.7.1, RL.7.3, RI.7.2, RI.7.6, L.7.4, L.7.5, SL.7.2 	<ul style="list-style-type: none"> ● Primary Standards: W.7.3a, W.7.3d, L.7.1a ● Additional Standards: 7.W.1, 7.W.4, 7.SL.3.1
26		
27	<u>EXCEL-erate Unit 6 Extensions</u>	
28		
29	<u>Unit 7 Lit. Seminar Scope and Sequence:</u> The Giver	<u>Unit 7 Writing Scope and Sequence:</u> Literary Analysis
30	<ul style="list-style-type: none"> ● Primary Standards: N/A ● Additional Standards: RL/RI.7.1, RL.7.2, RL.7.3, RL.7.4, RL.7.5, RI.7.6, L.7.4, L.7.5 	<ul style="list-style-type: none"> ● Primary Standards: W.7.1, W.7.1a, W.7.1b, W.7.2, W.7.2a, W.7.2b, W.7.9, L.7.1a, L.7.1b, L.7.1c ● Additional Standards: W.7.4, W.7.5, W.7.6, W.7.10, SL.7.4, SL.7.5, SL.7.6
31		
32	<u>EXCEL-erate Unit 7 Extensions</u>	
33		
34	Review	Review

Kindergarten Year at a Glance

- Click each Unit Title to access the Unit Planning Guide.
- Click [HERE](#) to access the Math Assessment Year at a Glance.
- Click [HERE](#) to access the Next Step Guides: Response to Data Resources.

The light blue indicates the Numeracy Development block; the light green represents the Concept Development block.

Week	
0	<u>Bridges Unit 1: Numbers to Five & Ten</u>
1	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%; background-color: #e1f5fe; padding: 5px;"> Number Corner <small>(see link above for standards addressed)</small> Math Stories NC.K.CC.3, NC.K.CC.4, NC.K.CC.5 </div> <div style="width: 45%; background-color: #e8f5e9; padding: 5px;"> Bridges NC.K.CC.1 </div> </div>
2	
3	
4	20 days of instruction, 5 days of Numeracy Assessment
5	Fall Numeracy Assessment
6	<u>Bridges Unit 2: Numbers to Ten</u>
7	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%; background-color: #e1f5fe; padding: 5px;"> Number Corner Math Stories NC.K.OA.1, NC.K.OA.2 </div> <div style="width: 45%; background-color: #e8f5e9; padding: 5px;"> Bridges NC.K.CC.1, NC.K.CC.4, NC.K.CC.5, NC.K.CC.6, NC.K.OA.3 </div> </div>
8	
9	
10	<u>Bridges Unit 3: Bikes & Bugs: Double, Add & Subtract</u>
11	
12	Numeracy Assessment Check Up 1
13	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%; background-color: #e1f5fe; padding: 5px;"> Number Corner Math Stories NC.K.OA.1, NC.K.OA.2 </div> <div style="width: 45%; background-color: #e8f5e9; padding: 5px;"> Bridges NC.K.CC.3, NC.K.CC.4, NC.K.CC.5, NC.K.CC.6, NC.K.OA.1, NC.K.OA.3 </div> </div>
14	
15	
16	<u>Bridges Unit 4: Paths to Adding, Subtracting & Measuring</u>
17	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%; background-color: #e1f5fe; padding: 5px;"> Number Corner Math Stories NC.K.OA.1, NC.K.OA.2 </div> <div style="width: 45%; background-color: #e8f5e9; padding: 5px;"> Bridges NC.K.CC.1, NC.K.CC.2, NC.K.CC.3, NC.K.CC.4, NC.K.CC.5, NC.K.CC.6, NC.K.CC.7, NC.K.OA.1, NC.K.MD.1, NC.K.MD.2, NC.K.MD.3 </div> </div>
18	
19	
20	<u>Bridges Unit 4: Paths to Adding, Subtracting & Measuring</u>
21	<u>Bridges Unit 5: Two-Dimensional Geometry</u>
22	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%; background-color: #e1f5fe; padding: 5px;"> Number Corner Math Stories NC.K.OA.1, NC.K.OA.2, NC.K.NBT.1 </div> <div style="width: 45%; background-color: #e8f5e9; padding: 5px;"> Bridges NC.K.CC.6, NC.K.OA.3, NC.K.MD.3, NC.K.G.1, NC.K.G.2, NC.K.G.3, NC.K.G.4, NC.K.G.5, NC.K.G.6 </div> </div>
23	
24	
	13 days of instruction, 5 days of Numeracy Assessment
	<u>Bridges Unit 6: Three-Dimensional Shapes & Numbers Beyond Ten</u>

	Number Corner Math Stories NC.K.OA.1, NC.K.OA.2, NC.K.NBT.1	Bridges NC.K.CC.1, NC.K.CC.3, NC.K.CC.6, NC.K.CC.7, NC.K.OA.1, NC.K.OA.2, NC.K.OA.3, NC.K.NBT.1, NC.K.G.1, NC.K.G.2, NC.K.G.3, NC.K.G.4, NC.K.G.5 12 days of instruction, 5 days of Numeracy Assessment
25	Numeracy Assessment Check Up 2	
26	<u>Bridges Unit 6: Three-Dimensional Shapes & Numbers Beyond Ten</u>	
27	<u>Bridges Unit 7: Weight & Place Value</u>	
28		
29	Number Corner Math Stories NC.K.OA.1, NC.K.OA.2, NC.K.NBT.1	Bridges NC.K.CC.1, NC.K.CC.3, NC.K.OA.1, NC.K.OA.2, NC.K.OA.3, NC.K.OA.5, NC.K.NBT.1, NC.K.MD.1, NC.K.MD.2 17 days of instruction, 5 days of Numeracy Assessment
30	<u>Bridges Unit 8: Computing & Measuring with Frogs & Bugs</u>	
31		
32		
33		
34	Number Corner Math Stories NC.K.OA.1, NC.K.OA.2, NC.K.OA.3, NC.K.NBT.1	Bridges NC.K.CC.3, NC.K.OA.1, NC.K.OA.2, NC.K.OA.3, NC.K.OA.4, NC.K.OA.5, NC.K.NBT.1, NC.K.MD.1, NC.K.MD.2 25 days of instruction, 5 days of Numeracy Assessment
35	Spring Numeracy Assessment	
36 - EOY	Review and Remediation	

Kindergarten Scope and Sequence - Detailed							
Week							
0	Routines and Procedures						
1	Unit 1	M1 S1	M1 S2	M1 S3	M1 S4	M1 S5	
2		M2 S1	M2 S2	M2 S3	M2 S4	M2 S5	
3		M3 S1	M3 S2	<i>Pause Day</i>	M3 S3	M3 S4	
4		M3 S5	M3 S6	M4 S1	M4 S2	M4 S3 & S4	
5	Fall Numeracy Assessment						
6	Unit 2	<i>Preteach Day</i>	M1 S1	M1 S2	M1 S3	M1 S4	
7		M1 S5	M2 S1	M2 S2	M2 S3	M2 S4	
8		M2 S5	M3 S1	M3 S2	M3 S3	M3 S4	
9	Unit 3	M3 S5	M3 S6	<i>Pause Day</i>	<i>Preteach Day</i>	M1 S1	
10		M1 S2	M1 S3	M1 S4	M1 S5	M2 S1	
11		M2 S2	M2 S3	M2 S4	M2 S5	M3 S1	
12		Numeracy Assessment Check Up 1					
13		M3 S2	M3 S3	M3 S4	M3 S5	M4 S1	
14	M4 S2	<i>Pause Day</i>	M4 S3	M4 S4	M4 S5		
15	Unit 4	<i>Preteach Day</i>	M1 S1	M1 S2	M1 S3	M1 S4	
16		M1 S5	M1 S5	M2 S1	M2 S2	M2 S3	
17		M2 S4	M2 S5	M3 S1	M3 S2	M3 S3	

18	Winter Numeracy Assessment						
19		M3 S4	M3 S5	Pause Day	M4 S1	M4 S1	
20	Unit 5	M4 S3	M4 S4	M4 S5	Preteach Day	M1 S1	
21		M1 S2	M1 S3	M1 S4	M1 S5	M2 S1	
22		M2 S2	M2 S3	M2 S4	M2 S5	M3 S1	
23		M3 S2	Preteach Day	M3 S1	M3 S2	M3 S3	
24	Unit 6	M3 S4	M3 S5	M4 S1	M4 S2	Pause Day	
25		Numeracy Assessment Check Up 2					
26		M4 S3	M4 S4	M4 S5	Preteach Day	M2 S1	
27	Unit 7	M2 S2	M2 S3	M2 S4	M2 S5	M3 S1	
28		M3 S2	M3 S3	M3 S4	M3 S5	M4 S1	
29		Pause Day	M4 S2	M4 S3	M4 S4	M4 S5	
30	Unit 8	Preteach Day	M1 S1	M1 S2	M1 S3	M1 S4	
31		M1 S5	M2 S1	M2 S2	M2 S3	M2 S4	
32		M2 S5	M3 S1	M3 S2	M3 S3	M3 S4	
33		M3 S5	M4 S1	Pause Day	M4 S2	M4 S3	
34		M4 S4	M4 S5	Pause Day			
35	Spring Numeracy Assessment						
36	Optional: U6 M1 & 2, U7 M1						

KINDERGARTEN MATH STORIES

Volume 1

SAMPLE

Introduction

Math stories are daily practices that allow students time to **solve problems in a way that makes sense to them, before a direct teacher model**. Students are expected and encouraged to solve problems using strategies that make sense to them. They are provided time to construct understanding through solving problems, collaborating with peers, and sharing solution strategies with the rest of the class.

The key idea in math stories is that students are provided an opportunity to solve a story problem **before** the teacher has modeled specific strategies to solve a problem. An essential idea for executing math stories is that as long as students can *count* and can *make sense* of a problem, they are able to solve any problem, often through using direct modeling and counting strategies, even before they begin to learn formal algorithmic procedures.

Essential Idea

As long as students can COUNT and MAKE SENSE of a problem, they can solve any problem that is presented to them by visualizing the problem and directly modeling with concrete objects or pictures. These strategies eventually evolve into counting strategies and number fact strategies, which leads to math fact fluency.



Math stories are designed to help students **make sense** of various types of addition and subtraction situation. When students visualize what happens in the story, they begin to associate images of joining and putting groups together with addition, and images of taking or giving away and separating with subtraction.

The structure of math stories builds the expectation that solving a problem takes time. It is necessary to think through the problem, figure out what is known, and determine what question is asked before you start to act on the numbers. The **process** of problem solving is just as important as arriving to a correct answer.

Standards for Mathematical Practice

Along with focusing on critical standards in addition and subtraction, math stories allow students to experience all of the eight math practice standards. Most notably, the math story structure gives students regular opportunities to work with the following:

- Math Practice Standard 1: Make sense of problems and persevere in solving them.
- Math Practice Standard 3: Construct viable arguments and critique the reasoning of others.
- Math Practice Standard 4: Model with mathematics.
- Math Practice Standard 5: Use appropriate tools strategically.

Teachers should work to establish a classroom culture that promotes students' ability to engage in these and all the math practice standards. This requires creating a culture where **mistakes** are expected and valued as learning opportunities. Because students are not shown **how** to solve number stories, students will regularly

encounter productive struggle, and will practice making sense of problems and will persevere in solving them each day.

Students are encouraged and expected to share their thinking and listen to the ideas of others, to pose and answer questions, and to explore and become familiar with mathematical tools. These tools are intentionally selected to highlight the mathematical concepts to be pursued in the lesson.

Introducing Math Stories

In order to solve story problems, student must be able to visualize the situation and understand what is being asked. Therefore, the math stories structure asks students to picture the story in their mind, to retell it in their own words, and to model it. The focus is that students make sense of the problem, therefore teachers should avoid labeling problems as addition or subtraction for students. A critical skill of sense making is determining what operation is needed. Additionally, many problems can be solved in a variety of ways. We want to provide opportunities for students to choose a solution strategy that makes sense to them, based on their understanding of the situation. Some students may decide to directly model the story with concrete objects, such as counters or cubes. Others may choose to start by drawing a picture that represents the story. Both strategies are appropriate, and students should be given the opportunity to use the strategy that comes naturally.

Supporting Students During Problem Solving

Students should be encouraged to show their work with objects, pictures, numbers, words, and, if they are ready, equations.

Objects: Manipulatives often come with a misconception that they should only be used by struggling or below grade-level students. When encountering new types of problems or working with larger numbers than they are used to, the majority of students naturally need to use objects to help them directly model and made sense of situations, even students who may have exhibited what appears to be “mastery” with a problem type they have been working with for a while. Manipulatives should be, at least, stored and made available in a way that they can easily be accessed by students if needed.

Pictures: Many students will initially draw each of the actual objects described in the math story. One goal for these students is to help them attach numbers to their work. You might ask how many objects are in each group, and then help the student label the groups with a number. Another goal is to move these students to use more efficient methods of recording. For example, students will need to understand what is important to show in math versus art class. For some students, this may mean drawing pictures with less detail. For other students, this may mean drawing a counter, cube, or tally to represent the objects in the story. Either way, students should use a representation that makes sense to them.

Numbers and Equations: It can be tricky to figure out how these students are solving the problem and to assess what they understand. Ask questions such as, “I see these three numbers here. Can you tell me what they mean?”

Words: If students write “I just knew” or “I counted”, then encourage them to explain *how* they counted. You might ask questions such as, “Where did you start counting? What numbers did you say when you counted? Where did you stop? How did you know when to stop?” After asking these questions, model how they might record their answer on paper.

It can be challenging for students to record the actual strategy they used to solve the problem. For example, a student may use the count on strategy to solve, but his/her written work suggests counting all. Ask students to explain their strategy, and help them think about how they might show that.

Recording Student Strategies

How the teacher records will give students models for how they can record their work. Whenever possible, base your recording on the way the student recorded.

Tammy found 4 pencils.
James found 2 pencils.
How many pencils did they find?

<p>Corey's strategy</p> <p>Tammy's pencils: 1, 2, 3, 4</p> <p>James' pencils: 5, 6</p>	<p>Danae's strategy</p> <p>1, 2, 3, 4 (Tammy's pencils)</p> <p>5, 6 (James' pencils)</p>
<p>Isaiab's strategy</p> <p>James' pencils: [] []</p> <p>Tammy's pencils: 3, 4, 5, 6</p> <p>2</p>	<p>Jasmine's strategy</p> <p>Tammy's pencils: [] [] [] []</p> <p>James' pencils: 5, 6</p> <p>4</p>

MATH STORY STRUCTURE OVERVIEW

Engage

 3-4 minutes

1

Show the Engage image from PowerPoint [see myNHA Curriculum app]. This will allow students to begin thinking about the context of the math story.



Look at this picture. I want you to take 15 seconds to think about what you notice and what you wonder.

2

Use a **Think-Pair-Share** structure (see *Best Practices*) to have students share:



Share with your partner what you notice and wonder about the picture.

3

Use an attention signal to bring students back to the whole group. Have 4-5 students share out for each. Accept any and all responses, as this will validate student thinking.

4

Record the students' notices and wonderings on the board or chart paper.

Note: It is not required to record notices/wonderings every day, however it should be done often at the beginning of the year and at least 2-3 times per week throughout the remainder of the year.



Best Practices


- It is suggested that students be seated in a carpet area for this part of the math story. This will create an engaging and comfortable setting for students to discuss ideas and set the stage for the problem they will later solve.
- Preplan a structure for the **Think-Pair-Share** and be very explicit with the directions.
Example: (After giving think time...)



Turn to your partner to share what you noticed. The partner who [has the most letters in their name] will go first. You will have [20 seconds] to share, I will tell you when to switch. Go!

Problem **10-12 minutes****1 Visualize**

Visualizing helps students to make sense of the problem they are about to work with. In the Engage, students viewed a picture that is connected to the math story for the day. Now you will ask students to visualize the context of the math story.

 ***I'm going to tell you a story. I want you to close your eyes and try to see it in your mind as I tell it. Example: Leah has 4 toy cars. James gave her 5 toy cars.***

Note: For this first read, tell the math story without the question while students visualize. The story also appears on the slide following the Engage image.

2 Retell

Having students think about the story they just heard and retell it to a partner will, again, allow students to make sense of what is happening in the story. This will later help students when it comes time to solve the actual problem.

Use a **Think-Pair-Share** structure (see *Best Practices in Engage*) to have students retell the story:

 **Think: Open your eyes and think about what you heard in the story. What did you hear first? What did you hear next? Give students some short think time.**

Pair: Turn to your partner. Give students guidance on who will share first.


Share: You and your partner will have [30 seconds] to share what you heard in the story. Go!

Use an attention signal to bring students back whole group. Ask 3-4 students to tell what they remember about the story. Even if one student tells the entire story correctly, ask a few more students to share out as well. The focus is on what students visualized in the story, not necessarily on retelling it exactly as it was told. If necessary, guide students' retelling by asking **What did you hear first? What did you hear next?**

If students are seated at the floor still, this would be a good time to send them back to their seats.


3 Pose the Problem

Reread the math story one more time, this time asking the question at the end. The question can also be brought up on the math story slide at this point.

 ***Now I'm going to tell you the story again, but this time I have a question I want you to think about. Example: Leah has 4 toy cars. James gave her 5 toy cars. How many toy cars does Leah have now?***

4 Make Sense

Pose a **Think-Pair-Share** question (see example below) to allow students to estimate and/or explore reasonable solutions before beginning to solve the problem.

 **Example: Do you think there will there be more than 5 cars or less than 5 cars? How do you know? Turn and talk with a partner about what you think and why.**

Note: This is **not** the point to discuss with students what operation should be used to solve or what an equation for this problem would be.

5 Solve

Students are now given time to model the problem using manipulatives and/or pictures. They should also document their work and strategy on the student recording page.*

The teacher should **not** model how to solve the problem or tell students what equation to use. Students should focus on the context of the story to choose a strategy to solve that makes sense to them.


 **Now I want you to think about our story use manipulatives or pictures to model the problem and show your solution strategy. If you use manipulatives, draw a picture of what you did with your manipulatives.**

Students can begin by working on their own to solve the problem, but should be given the option to work collaboratively. All students should be given the opportunity to share their strategy or clarify their thinking with a peer before the whole group discussion.

***Note:** When looking at the pacing calendars for each unit, math stories that are highlighted green will not have a student recording page available. This is designed purposefully, as students are encountering a new problem or working within a larger total on a familiar problem type.

6 Circulate and Ask Questions

Circulate, listen, and observe student thinking. While it may feel natural to focus on whether students are getting the problem correct or not, the focus should be shifted more toward looking for and seeking to understand students' strategies. Support students' attempts at the problem, even if the strategy is inefficient, to validate and build from their thinking. Ask probing questions (see examples below) to clarify student thinking, determine solving strategies, and keep students connected to the **context** of the math story.

 **Examples: What do we know in the problem? How could you use the manipulatives to show [detail from math story]? How did you count these? What part of the story does this show?**

Remember this is not the time to FIX the mathematician, but to DEVELOP them.

While circulating, listen to students talk about their strategy to determine who will share during the discussion and in what sequence.

7

Choose

Identify 2-4 students who you will have share in the discussion based on the strategies you have *anticipated* and pre-planned to highlight. While *monitoring* student work, *select* the students to share. Decide the *sequence* in which students will share based on the progression of strategies so that you can make appropriate *connections*.

Leah has 4 toy cars. James gave her 5 toy cars. How many toy cars does Leah have now?

Strategy 1: $\begin{array}{cccc} 0000 & 00000 \\ 1234 & 56789 \end{array}$

Strategy 2: $\begin{array}{cccc} \boxed{0000} & 00000 \\ 4 & 56789 \end{array}$

Strategy 3: 4+4 is 8, so 1 more makes 9



Best Practices

- In order to make the math story more engaging, it is suggested to embellish the story with student names, teacher names, and other relatable details. Make the story connect to you or your students.

Original Math Story	Embellished Math Story
Leah has 4 toy cars. James gave her 5 toy cars. How many toy cars does Leah have now?	I noticed while we were having indoor recess today that you were all playing with different things. I saw Leah and James playing with cars. Leah had 4 cars when she started playing. Then James decided he wanted to play with something else, so he gave his 5 cars to Leah. How many cars did Leah have then?

- While observing students and determining who will share during the discussion, put a numbered sticky note on students' desk in the order that they will share.

Discussion

5-7 minutes

1

Students Share Strategies

Ask the 2-4 pre-determined students to share their strategies for solving the problem using the pre-planned sequence. Students should have their student recording page and/or manipulatives projected under the document camera as they talk through their strategies.

2

Teacher Records Student Strategies & Poses Questions

As students share their thinking, the teacher should record their strategies on chart paper or the whiteboard to capture the students' thought processes and have to refer back to during discussion. Pose questions to clarify each student's strategy and connect the work back to the problem.



Examples: What part of the math story does this part of your picture represent? How did count your connecting cubes (e.g., counting all, counting on, etc.)?

3

Students Discuss, Analyze and Compare Strategies

Pose a **Think-Pair-Share** to allow students to discuss, analyze and/or compare strategies to make connections (see examples below).

The following options can help facilitate a meaningful student discussion:

- Give students a focus as classmates are sharing to find one thing that is **similar** and/or one thing that is **different** about the strategy compared to their strategy.
- Have students show a thumb up if they used the same or similar strategy.
- Have students retell the strategy shared in their own words:
 - **Turn to your partner and explain the strategy _____ used to solve.**
- Encourage students to ask the student who is sharing a clarifying or probing question about his/her strategy.

4

Teacher Connects Strategies to Equations

This is the point in the math story where it is most appropriate to discuss equations if students have not used them to represent their thinking **on their own**. Discussing an equation now, rather than earlier in the math story process, ensures that the equation will match the student work versus students trying to match their work to an equation.



Example: Let's think about this strategy and the picture, how could we show what [student] did with numbers also.

Initially, the teacher should model writing the equation, connecting each part to the picture and story. As students begin representing their thinking with numbers, the teacher should question students about the connection of each part of the equation to the story.

**Best Practices**

- Prior to the whole group discussion, consider having students share strategies with a partner.
- It is suggested that students be seated in a carpet area for this part of the math story. This will create an engaging and comfortable setting for students to discuss ideas. It will also limit the distraction of manipulatives and other materials as strategies are being shared.

Key Points

 2-3 minutes

1

This is where the teacher will make an explicit and pre-planned connection from the student strategies to the big mathematical idea for the day/week/unit. The teacher should always try to build off student thinking and connect to mathematical ideas at the conclusion of the math story. The ultimate goal is to begin building procedural fluency from conceptual understanding.

This is the point in the lesson where the teacher is creating or finalizing an anchor chart that was started in the discussion. This anchor chart highlights key strategies that can be used in later math stories.

Specific examples and suggestions for Key Points will be provided for individual math stories throughout the year and will change as the focus on different problem types and strategies change.

 Example: *I noticed there were two strategies that used counting (see Strategies 1 and 2 in step 7 of Problem), let's look a little closer at those two strategies.*

Remember in the first strategy, [student] counted like this: 1, 2, 3, 4, 5, 6, 7, 8, 9.

In the second strategy, [student] counted like this: 4, 5, 6, 7, 8, 9.

Teacher may then use a **Think-Pair-Share** to have students discuss how the strategies are similar and different.

We found out that both strategies helped us figure out that Leah had 9 cars.

In the first strategy, we counted all of Leah's cars and the cars James gave her.

In the second strategy though, we remembered that Leah had 4, so we didn't have to count them again. Instead we just counted on from 4 and that took less time to count!

2

Wrap-up the math story by articulating what students did today and how it connects to big mathematical ideas and the 'I can' statement.

 Example: *"Boys and girls, today you solved an equal groups problem by modeling the problem and then using skip counting or repeated addition to get the total."*

Practice Problem

An additional problem is available, but not required to be used, for each math story. This problem follows the same problem type and works with similar numbers. The practice problem can be used to encourage students to try a different strategy. This could also be used as an exit ticket/formative assessment.

North Carolina

3rd Grade Year at a Glance

- Click each Unit Title to access the Unit Planning Guide.
- Click [HERE](#) to access the Math Assessment Year at a Glance.
- Click [HERE](#) to access the Next Step Guide: Response to Data Resources.

The light blue indicates the Numeracy Development block; the light green represents the Concept Development block.

Week

0	<u>Bridges Unit 1: Addition and Subtraction Patterns (M 3 & 4)</u>	
1	Number Corner <small>(see link above for standards addressed)</small>	Bridges 3.OA.9, 3.NBT.2
2	Math Stories 3.NBT.2	
3	<u>Bridges Unit 2: Introduction to Multiplication</u>	
4	Number Corner	Bridges
5	Math Stories	3.OA.1, 3.OA.2, 3.MD.3
6	3.OA.1, 3.OA.2, 3.OA.3, 3.OA.5,	
7	3.OA.7, 3.OA.8, 3.NBT.3	
8		
9	<u>Bridges Unit 3: Multi-Digit Addition and Subtraction</u>	
10	Number Corner	Bridges
11	Math Stories	3.OA.8, 3.NBT.1, 3.NBT.2
12	3.NBT.2	
13	North Carolina Check-In A NC.3.OA.1 · NC.3.OA.2 · NC.3.OA.9 · NC.3.NBT.2 · NC.3.MD.3	
14	<u>Bridges Unit 4: Measurement and Fractions</u>	
15	Number Corner	Bridges
16	Math Stories	3.OA.3, 3.OA.8, 3.NF.3,
17	3.MD.1, 3.MD.2, 3.MD.6, 3.MD.7, 3.MD.8	3.MD.1, 3.MD.2, 3.MD.4, 3.G.2
18		
19	<u>Bridges Unit 5: Multiplication, Division, and Area</u>	
20	Number Corner	Bridges
21	Math Stories	3.OA.1, 3.OA.2, 3.OA.3, 3.OA.4, 3.OA.6, 3.OA.7,
22	3.OA.1, 3.OA.2, 3.OA.3, 3.OA.5,	3.OA.8, 3.NBT.3, 3.MD.5, 3.MD.6, 3.MD.7
22	3.OA.7, 3.OA.8, 3.NBT.3	
22	North Carolina Check-In B NC.3.OA.3 · NC.3.OA.8 · NC.3.NBT.3 · NC.3.MD.7 · NC.3.MD.8	

23	<u>Bridges Unit 6: Geometry (M 1, 2 & 4)</u>	
24	<u>Bridges Unit 6: Geometry (M 3)</u>	
25	Number Corner Math Stories 3.OA.1, 3.OA.2, 3.OA.3, 3.OA.5, 3.OA.7, 3.OA.8, 3.NBT.3	Bridges 3.MD.7, 3.MD.8, 3.OA.8, 3.G.1, 3.G.2
26		
27		
28	<u>Bridges Unit 7: Fractions (M 3 & 4)</u>	
29	Number Corner Math Stories 3.NF.1, 3.NF.2	Bridges 3.OA.5, 3.OA.7, 3.OA.8, 3.NBT.1, 3.NF.1, 3.NF.2, 3.NF.3, 3.NF.4, 3.MD. 7, 3.G.2
30	<u>Bridges Unit 7: Extending Multiplication (M1)</u>	
30	Number Corner Math Stories 3.NF.1, 3.NF.2	Bridges 3.OA.5, 3.OA.7, 3.OA.8, 3.NBT.1, 3.NF.1, 3.NF.2, 3.NF.3, 3.NF.4, 3.MD. 7, 3.G.2
31	North Carolina Check-In C NC.3.OA.8 · NC.3.NF.2 · NC.3.NF.3 · NC.3.NF.4 · NC.3.G.1	
32	<u>Bridges Unit 7: Extending Multiplication (M2)</u>	
32	Number Corner Math Stories 3.NF.1, 3.NF.2	Bridges 3.OA.5, 3.OA.7, 3.OA.8, 3.NBT.1, 3.NF.1, 3.NF.2, 3.NF.3, 3.NF.4, 3.MD. 7, 3.G.2
33 - EOY	Review and Remediation	

North Carolina

3rd Grade Year at a Glance

Week						
0	Routines and Procedures					
1	Unit 1	M3 S1: PI	M3 S2: PI	M3 S3: MF	M3 S4: PS	M3 S5: PS
2		Quiz #1 M4 S3: WP	M4 S2: PI	M4 S3: MF	M4 S4: PI	M4 S5: PI
3	Unit 2	Review	Unit 1 EOU Assessment	Pre-Teach Day	M1 S1: PI	M1 S2: PS
4		M1 S3 & S4: MF	M1 S4: PS	M1 S5: WP Quiz #1	M2 S1 & S2: PI	M2 S2: PI
5		Pause Day Unit 3 Screener	M2 S3: WP	M2 S3 & S4: PS	M2 S3 & S5: PI	M2 S5: PI
6		M2 S5: PS	M2 S5: WP	M3 S1 & S3: PS Quiz #2	M3 S2: PI	M3 S2: PS
7		M3 S3: PI	M3 S4: PI	M3 S5: WP	M4 S1: PI Quiz #3	M4 S2: PI
8		M4 S3: PI	Review	Unit 2 EOU Assessment	Pre-Teach Day	M1 S2 & S4: PI
9		Unit 3	M1 S2: WP	M1 S3: PS	M1 S5 & S6: MF	M1 S4: PI
10	M2 S2: PI		Pause Day Unit 4 Screener	M2 S3: PS	M2 S4 & S5: MF	Quiz #2 Pre-teach
11	M3 S1: WP		M3 S2: PI Quiz #3	M4 S1: PI	M4 S2: PI	Pause Day
12	M4 S3: PI		M4 S4: PI	Review Day	Quiz #4	
13	NC Check-in "A" Review and Check-In Testing					
14	Unit 4	M1 S2: PI	M1 S2: WP	M1 S3: PI	M1 S4: PI	M1 S5: PI
15		M1 S6: PI	M2 S1: PI Quiz #1	M2 S3 & S4: MF	Pause Day	M2 S4: PI
16		M3 S1: PI Quiz #2	M3 S2: PI	M3 S3: PI	Pause Day	M3 S3: WP Unit 5 Screener
17		M3 S4: PI	M3 S5: PI	M4 S1: PI Quiz #3	M4 S2: PI	M4 S3: PI
18		Review	Unit 4 EOU Assessment	Pre-Teach Day	M1 S1 & S2: PI	M1 S3: PI
19	Unit 5	M1 S4: PI	M1 S5 & S6 PI	M1 S6: WP Quiz #1	M2 S1 & S2: MF	M2 S2: WP Pause Day
20		M2 S3: PI	M2 S4: PI	M3 S1 & S2: MF	M3 S3: WP Quiz #2	M3 S4: WP Pause Day
21		M4 S1: PI	M4 S2: PI Quiz #3	M4 S3: PI	M4 S4: PI	M4 S5: PI
22	NC Check-in "B" Review and Check-in Testing					

23	Unit 6	Pre-Teach Day	M1 S2: PI	M1 S3 & S4: PI	M1 S4: PI	M1 S5: WP
24		Quiz #1	M2 S1: PI	M2 S2: WP	M2 S3: PI	M2 S4: WP
25		M2 S5: PI	Pause Day	Quiz #2	M3 S1: PI	M3 S2: PI
26		M3 S3: PI	M3 S4: PI	M3 S5: PI	M3 S5: WP Quiz #3	M4 S1: PI
27		M4 S2: PI	M4 S3: PI	Review Day	Unit 6 EOY Assessment	M3 S1: PI
28		Unit 7	M3 S2: PI	M3 S3: PI	M3 S4: PI	M3 S5: WP Quiz #3
29	M4 S2: PI		M4 S3: PI	M4 S4: PI	Pause Day Review Day	Quiz #4
30	M1 S2: PI		M1 S3: PI	M1 S5: PI M2 S1: PI	M2 S2: PI	Quiz #1
31	NC Check-in "C" Review and Check-In Testing					
32	Unit 7	M2 S3: PS	M2 S4: PI	Pause Day	M2 S5: PI	Review
33- EOY	Review and Remediation					

THIRD GRADE MATH STORIES

Book 1

NORTH
CAROLINA





INTRODUCTION

Research shows that as long as students can count and make sense of the context of a problem, they are able to solve any problem by using direct modeling and/or counting strategies before they understand the formal algorithmic procedures (Carpenter, et al., p. 4). Math stories are daily lessons that provide students time to develop problem solving skills based on this research.

During a Math Story lesson, the teacher exposes students to an engaging image and helps them make meaning of the context of the story. Students are then allowed to solve the problem in a way that makes sense to them using strategies and reasoning they have previously learned. The primary role of the teacher is to facilitate student thinking and reasoning by asking questions allowing students to solve problems based on their mathematical understanding.

Students are encouraged to solve problems by applying their knowledge of strategies that can help them efficiently arrive at the answer. Mathematical discourse is essential as students are allowed to collaborate with peers and share solutions with the rest of the class. Lessons end as the teacher guides the discussion about student work by purposefully selecting students to share work based on the strategies they used.



Math Stories and Bridges Alignment

At NHA, we believe high-quality mathematics instruction incorporates ongoing cumulative review. One of the most effective strategies for fostering fluency and retention of critical skills is frequent cumulative review. One of the places you will see this opportunity is in Math Stories. In grades 3-5, Math Stories serve as an opportunity for students to apply understanding and have ongoing practice with priority standards and critical problem-solving skills throughout the year.

Please note: This is a shift from how the 3-5 yearlong scope and sequences were designed in previous years. Previously, we were utilizing Math Stories to introduce priority standards and our core curricular tool was used for cumulative review. Now that we have a high-quality resource in Bridges, it will serve as the core instructional resource to introduce new concepts, allowing Math Stories to serve as an opportunity for cumulative review and application of learning.



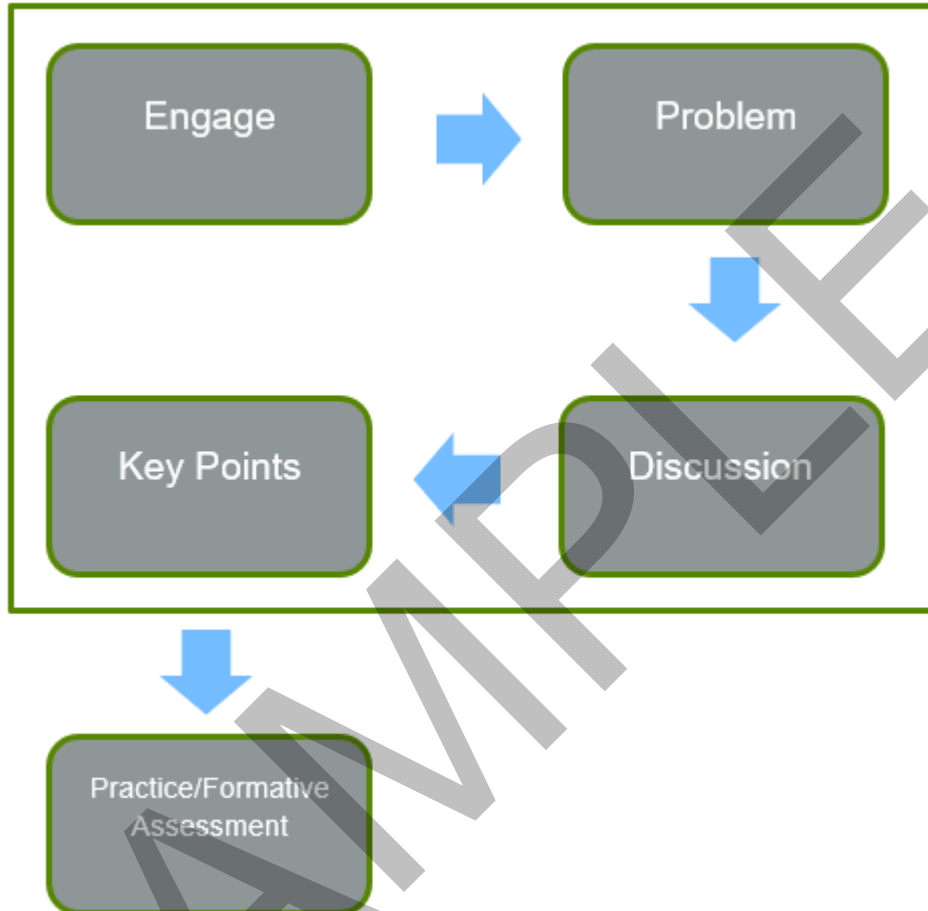
VISUAL MODELS

Students will use visual models throughout the Math Stories topics. These models are critical to providing access for students and helping students gain a deep understanding of the concepts being explored. It is important that the visual models are printed prior to beginning the lesson. Visual models can be found within the corresponding math story lesson or the student pages provided by NHA.

Math Story Structure

Math Story

Grade Level Math Story that is Accessible to ALL Students. The teacher facilitates the math story using the structure shown below.



MATH STORY OVERVIEW

Engage

1

Show the Engage image from NHA provided PowerPoint. This will allow students to begin thinking about the context of the Math Story.



2

Pose questions to students using a Think-Pair-Share structure:



What do you notice about the picture?

What do you wonder about the picture?

3

Have several students share out whole group. Accept any and all responses, even non-mathematical notices and wonderings. This will validate student thinking.

4

Record the students' notices and wonderings on the board or anchor chart at least 2-3 times a week.

Notice	Wonder
group of girls	Is there a football game?
cheerleaders	Are they on a dance team?
dance team	Are they cheerleaders?
on a football field	How old are they?
more than 10 girls	



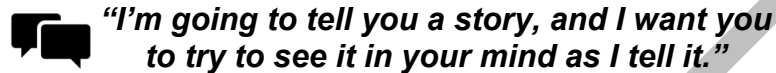
Best Practices

- *We suggest bringing students to a carpet area for this portion of the Math Story. This will create an engaging and comfortable setting as you set the stage for the problem that the students will later solve.*

Problem

1 Visualize

Visualizing a story helps students to make sense of the problem. Students just viewed a picture that is connected to the Math Story for the day. Now you will ask students to visualize the context of the Math Story.



You will first read the Math Story without the question while students visualize.

2 Retell

Having students think about the story they just heard and retelling it to a partner will, again, allow students to make sense of what actions are occurring in the story. This will later help students when it comes time to solve the actual problem.

Have students retell the story using a Think-Pair-Share structure:



Think- Have students think about what they heard in the story.

Say: ***What did you hear first? What did you hear next?***

Pair- Say: ***Turn to your partner***

Share- Have students share with their partner.

[ex: Partner A share what you heard first, Partner B share what you heard next.]

Bring class back together whole group and ask several students to tell what they remember about the story. Even if one student tells the story correctly, ask a few more students to share out as well. The focus is on **visualizing** what is happening in the story, not on retelling it exactly as it was told. If necessary, guide students’ retelling by asking ***What did you hear first? What did you hear next?***

3 Pose the Problem

Now it is time to pose the **whole** problem for students to solve. Reread the Math Story one more time, this time asking the question at the end.

4 Make Sense

Pose a *Think-Pair-Share* question (see example below) to allow students to estimate and/or explore reasonable solutions before beginning to solve the problem.



Example: Do you think there will there be more than 8 eyes or less than 8 eyes? How do you know? Turn and tell your partner if you think there will be more or less than 8 eyes.

5 Solve

Have students return to their seats to model the problem using manipulatives or pictures and document the strategy they use on their student recording sheet. The teacher should **NOT** model **how** to solve the problem or what equation to use. Students should focus on the context of the story to choose a strategy to solve that makes sense to them.



Say: Now that you have a visual image of what is happening in today's story, I want you to:

- 1. Think about the strategy you want to use.**
- 2. Head back to your seat and use cubes or pictures to model the problem and show your solution strategy.**
- 3. Work with your partner and share your solution strategy before the discussion.**

Students can begin by working on their own to solve the problem but should be given the option to work collaboratively. All students should be given the opportunity to share their strategy or clarify their thinking with a peer before the whole group discussion.

6 Circulate and Ask Questions

Circulate, listen, and observe student thinking. Support their attempt at the problem, even if it is inefficient, to validate and build from their thinking. Then ask probing questions and keep students connected to the **context** of the Math Story.



- 1. What do we know in the problem?**
- 2. How could you use these cubes to show the [eyes on one person]? On two people? How can that help you?**
- 3. Is there a faster way you could count the number of [eyes] in your picture?**
- 4. Is there another way you could find the total number of [eyes] in the picture?**


Remember this is not the time to FIX the mathematician, but to DEVELOP them.

As you are circulating and listening to the students talk about their strategy, be thinking about who you will choose to share their strategy during the discussion. What part of their strategy do you want to highlight? Will they share first, second, or last?

7 Choose

Identify 2-4 students who you will have share in the discussion based on the strategies you have pre-planned to highlight. Decide in what order they will share based on the progression of strategies.

There are 8 people on the dance team. Each person has 2 eyes. How many eyes are there in all?



① 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16

② 2, 4, 6, 8, 10, 12, 14, 16

③ $2+2+2+2+2+2+2+2=16$

Best Practices

- When you ask students to visualize, have students close their eyes as you tell the story.
- In order to make the Math Story more engaging, we suggest embellishing the story with student names, teacher names, and other relatable details. Make the story connect to you or your students.

Original Story	Embellished Story
In a garden there are 6 rows of tulips. There are 8 tulips in each row. How many tulips are there in all?	Boys and girls, you know how I love gardening! This past Spring I planted lots of different flowers in my flower garden. One of my favorite types of flowers is a tulip. In my garden I planted 6 rows of tulips. There were 8 tulips in each row. How many tulips were there in all?

Discussion

- 1 Ask the 2-4 pre-determined students to share their strategy for solving the problem. As students share their thinking, the teacher should record their strategies on chart paper to capture the students' thinking process.

Options to facilitate student discussion:

- Teacher asks the student sharing, **WHY** they chose the strategy they did.
- Teachers asks the other students to find one thing that is **similar** and one thing that is **different** about the strategy compared to their strategy.
- Another student can ask the student who is sharing, a clarifying or probing question about their strategy.
- Other students retell the strategy in their own words.
- Show a thumbs up if you used the same or similar strategy.
- Turn to your partner and explain the strategy that ____ used to solve.
- Who can tell in their own words how ____ solved this problem?

Key Points

- 1 This is where the teacher will make an explicit and pre-planned connection from the student strategies to the big mathematical idea for the day/week/unit. Specific examples and suggestions for Key Points will be provided for individual Math Stories throughout the year and will change as the focus on different mathematics strategies change.



Example: ***“I noticed you all shared strategies that involved 8 people with two eyes each. It really helped us to use our cubes or draw pictures to then count the total number of eyes. Let’s take a look at strategy 3. Turn and talk to your partner, where do you see the ‘8 people’ and where do you see the ‘2 eyes’ represented?”***

We are going to continue exploring how to model equal groups problems on paper, solve using different strategies AND represent with words and an equation for the rest of this week. To close out our Math Story today, you are going to solve one more problem on your own.”

- 2 Wrap-up the Math Story by articulating what students did today and how it connects to big mathematical ideas and the I Can statement.



Example: ***“Boys and girls, today you solved an equal groups problem by modeling the problem and then using skip counting or repeated addition to get the total.”***

Practice Problem

- 1 Students will now solve one practice problem **ON THEIR OWN**, similar to the one that was just done in the Math Story.

Give students the same expectations to solve this problem:

1. *Think about the strategy you want to use.*
2. *Use manipulatives, pictures, or numbers to model the problem and show your solution strategy.*
3. *Work independently.*

Best Practices

- *There are different ways that this Practice Problem can be used to inform the teacher of student progress:*
 - *Collect it and scan through to identify students who are struggling with finding a solution strategy.*
 - *Circulate as students are working on the problem to observe solution strategies being used, then go over together whole class.*
 - *Collect and each day identify a different group of students whose you will check and record progress.*

8th Grade Scope and Sequence 2024-2025Click [HERE](#) to access the Next Step Guide: Response to Data ResourcesClick [HERE](#) to view the Math Assessment Year at a Glance.

Week	Unit	Lessons	Check-In Standard
0	Week 0 Resources		
1	Unit 1: Rigid Transformations and Congruence	1-17	NC.8.G.3 NC.8.G.5
2			
3			
4			
5	Unit 2: Dilations	1-5	NC.8.G.3
6	Unit 3: Linear Relationships *Rational & Irrational	1-10 #1-4	NC.8.EE.5 NC.8.NS.1
7			
8			
9	Unit 4: Linear Equations and Linear Systems *Properties of Exponents	1-16 #1-5	NC.8.EE.7 NC.8.EE.1
10			
11			
12	Unit 5: Functions	1-3	NC.8.F.1
13	North Carolina Check-In A: NC.8.NS.1 · NC.8.EE.1 · NC.8.EE.7 · NC.8.F.1 · NC.8.G.3		
14	Unit 5: Functions and Volume	4-22	NC.8.F.3 NC.8.F.4 NC.8.F.5 NC.8.F.2
15			
16			
17			
18	Unit 2: Dilations, Similarity, and Introducing Slope	6-13	NC.8.G.5
19			
20	Unit 6: Associations in Data	1-11	NC.8.SP.1 NC.8.SP.2 NC.8.SP.3
21			
22	North Carolina Check-In B: NC.8.EE.7 · NC.8.F.3 · NC.8.F.4 · NC.8.F.5 · NC.8.G.5		
23	Unit 7: Exponents and Scientific Notations	1-16	NC.8.EE.1 NC.8.EE.3 NC.8.EE.4
24			
25			
26			
27	Unit 8: Pythagorean Theorem and Irrational Numbers	1-15	NC.8.EE.2 NC.8.NS.1 NC.8.NS.2 NC.8.G.7
28			
29			
30			
31	North Carolina Check-In C: NC.8.EE.8 · *NC.8.F.2 · NC.8.SP.1 · NC.8.SP.2 · NC.8.SP.3		
32+	Optional Unit 9 / Start EOG Review		

*Additional lessons were created to ensure that students were exposed to NC.8.NS.1 and NC.8.EE.1 prior to Check-In A. We recommended weeks 6 and 9, but these can be taught any time prior to administering the Check-In.

NC 8th Grade Weekly Instructional Planning Guide

Week	Unit	Lesson				
0	Week 0 Resources Routines and Procedures – Administer Unit 1 Preassessment					
1	1	Pre-teach Day: Unit 1 Unfinished Learning Activities*	Lesson 1 Engage, Activity 1 Lesson 2 Activity 1, Exit Ticket	Lesson 3	Lesson 4 Engage, Activity 2, Exit Ticket	Lesson 5
2	1	Lesson 6 Engage, Activity 1 Quiz A	Pause Refer to Exit Ticket Guidance	Lesson 7	Lesson 8	Lesson 9
3	1	Lesson 10 Engage, Activity 1, Activity 2 Quiz B (optional)	Lesson 11	Lesson 12 Administer Unit 3 Preassessment this week	Lesson 13 Engage, Activity 1, Activity 2 Quiz C	Pause Refer to Exit Ticket Guidance
4	1	Lesson 14 Engage, Lesson 1 Lesson 15 Activity 2, exit ticket	Unit 1 Review	Unit 1 Assessment	Review	Lesson 1
5	2	Lesson 3 Activity 1 Lesson 4 Activity 1, Activity 2, Exit ticket	Pause Refer to Exit Ticket Guidance	Lesson 5 Engage, Activity 1 Quiz A	Pre-teach Day: Unit 3 Unfinished Learning Activities*	Pre-teach Day: Unit 3 Unfinished Learning Activities*
6	3	#1 Rational & Irrational Lesson 1	#2 Rational & Irrational Lesson 2	#3 Rational & Irrational Lesson 3	Lesson 4 Engage, Activity 1 Quiz A	#4 Rational & Irrational Lesson 5
7	3	Lesson 6 Administer Unit 4 Preassessment this week	Pause Refer to Exit Ticket Guidance	Lesson 7 Engage, Activity 1 Activity 2 Quiz B	Lesson 8	Lesson 9 Engage, Activity 1, Activity 2 Optional Quiz C
8	3	Lesson 10	Unit 3 Review	Unit 3 Assessment	Pre-teach Day: Unit 4 Unfinished Learning Activities*	Pre-teach Day: Unit 4 Unfinished Learning Activities*
9	4	#1 Properties of Exponents Lesson 2	#2 Properties of Exponents Lesson 3	#3 Properties of Exponents Lesson 4	#4 Properties of Exponents Lesson 5	#5 Properties of Exponents Lesson 6
10	4	Lesson 7	Lesson 8	Lesson 9 Engage, Activity 1, Activity 2 Quiz A & B	Lesson 10	Lesson 11
11	4	Lesson 12 Administer Unit 5 Preassessment this week	Pause Refer to Exit Ticket Guidance	Lesson 13	Lesson 14	Lesson 15 Engage, Activity 1, Activity 2 Quiz C
12	4	Unit 4 Review	Unit 4 Assessment	Lesson 1	Lesson 2	Lesson 3
13	North Carolina Check-In A: NC.8.NS.1 · NC.8.EE.1 · NC.8.EE.7 · NC.8.F.1 · NC.8.G.3					

14	5	Pre-teach Day: Unit 5 Unfinished Learning Activities*	Pre-teach Day: Unit 5 Unfinished Learning Activities*	Lesson 4	Lesson 5	Lesson 6
15	5	Lesson 7 Engage, Activity 1, Activity 2 Quiz A & B	Pause Refer to Exit Ticket Guidance	Lesson 9	Lesson 10 Engage, Act 1, Act 2 Optional Quiz C	Lesson 11 Engage, Activity 1 Lesson 12 Engage Activity 1
16	5	Lesson 13 Administer Unit 2 Preassessment this week	Lesson 14	Pause Refer to Exit Ticket Guidance	Lesson 15	Lesson 16 Engage, Activity 2 Quiz D
17	5	Lesson 18	Lesson 19 Engage, Activity 1 Lesson 20 Activity 1, Activity 2 Exit Ticket	Lesson 21	Unit 5 Review	Unit 5 Assessment
18	2	Pre-teach Day: Unit 4 Unfinished Learning Activities*	Lesson 6	Lesson 7	Lesson 8 Administer Unit 6 Preassessment this week	Lesson 9 Engage, Activity 1, Activity 2 Quiz B
19	2	Lesson 10	Lesson 11	Lesson 12	Unit 2 Review	Unit 2 Assessment
20	6	Pre-teach Day: Unit 6 Unfinished Learning Activities*	Lesson 1 Engage, Activity 1 Lesson 2 Activity 1, Activity 2 Exit Ticket	Lesson 3	Lesson 4	Lesson 5
21	6	Lesson 6 Administer Unit 7 Preassessment this week	Lesson 7 Engage, Activity 2 Lesson 8 Activity 2, Engage	Lesson 9 Activity 1, Activity 2 Quiz A & B (Optional)	Lesson 10	Unit 6 Assessment
22	North Carolina Check-In B: NC.8.EE.7 · NC.8.F.3 · NC.8.F.4 · NC.8.F.5 · NC.8.G.5					
23	7	Pre-teach Day: Unit 7 Unfinished Learning Activities*	Lesson 1	Pause Refer to Exit Ticket Guidance	Lesson 2	Lesson 3
24	7	Lesson 4	Lesson 5	Lesson 6	Lesson 7	Lesson 8 Engage, Activity 1, Activity 2 Quiz A & B
25	7	Pause Refer to Exit Ticket Guidance	Lesson 9 Administer Unit 8 Preassessment this week	Lesson 10 Engage, Activity 1 Lesson 11 Engage, Activity 1	Lesson 12	Lesson 13
26	7	Pause Refer to Exit Ticket Guidance	Lesson 14	Lesson 15	Unit 7 Review	Unit 7 Assessment
27	8	Pre-teach Day: Unit 8 Unfinished Learning Activities*	Lesson 1	Lesson 2	Lesson 3	Lesson 4

28	8	Lesson 5 Engage, Activity 1, Activity 2 Quiz A & B	Pause Refer to <u>Exit</u> Ticket Guidance	Lesson 6	Lesson 7	Lesson 8
29	8	Lesson 9	Lesson 10	Pause Refer to <u>Exit</u> Ticket Guidance	Lesson 11 Engage, Activity 1, Activity 2 Quiz C	Lesson 12
30	8	Lesson 13	Pause Refer to <u>Exit</u> Ticket Guidance	Lesson 14	Unit 8 Review	Unit 8 Assessment
31	North Carolina Check-In C: NC.8.EE.8 · NC.8.F.2 · NC.8.SP.1 · NC.8.SP.2 · NC.8.SP.3					
32+	Optional Unit 9 and EOG Review					

SAMPLE

8th AIM Math (Pathway 1) Year at a Glance

We subscribe to the philosophy that our curriculum provides enough depth to allow for differentiation (enrichment) without an accelerated track. However, we recognize there are many practices regarding compacting courses and therefore have carefully crafted a draft of accelerated coursework. The goal of this document is to provide schools with a curriculum map for compacting Grades 7, 8, and Algebra I/Integrated I into two courses in middle school; 7/8 Accelerated, and Grade 8/Algebra I.

Rationale for Selection and Sequencing of Units

This 8th grade course will complete the remaining 8th grade units (see below) not covered in the 7AIM Pathway 1 course and integrate them into your current Algebra I materials to ensure a coherent experience for students.

Units from 8th grade are integrated with the Algebra I units to create a meaning flow of instruction that connects 8th grade units to its partner Algebra I Unit.

Instructional Considerations

Activities have been omitted as a result of compacting, which changes the original flow and structure of the lesson. This results in instructional choices for the teacher.

- For example, warm-ups and cool downs can be inserted within any lesson if there is a need for students to independently show their level of understanding.
- The timing assigned to each activity will be at the discretion of the teacher and not what is listed within the lessons.
- Some of the activities not included in this scope and sequence provide additional fluency work. These activities can be included when student needs suggest more procedural fluency work is necessary.
- Review days, or partial days, can be inserted where needed for appropriate practice time.

The following partial year at a glance is intended for 8th grade students in the 8 AIM Pathway 1. It covers all the remaining Grade 8 content and all the HS Algebra I content.

8 th Grade AIM Year at a Glance	
Week	
0	Routines and Procedures- Administer Pre-assessment
1	8 Unit 1: Associations in Data (8 Unit 6) 8.SP.A • 8.SP.A.1 • 8.SP.A.2 • 8.SP.A.3 • 8.SP.A.4
2	8 Unit 2: Pythagorean Theorem and Irrational Numbers (8 Unit 8)
3	8.NS.A • 8.NS.A.1 • 8.NS.A.2 • 8.EE.A • 8.EE.A.2 • 8.F.B • 8.G.B • 8.G.B.6 • 8.G.B.7 • 8.G.B.8
4	8 Unit 3: Introduction to Linear Equations and Linear Systems (8 Unit 4)
5	8.EE.C • 8.EE.C.7 • 8.EE.C.8
6	ALG Unit 1: Sequences
7	SSE.1 (SSE.1a, SSE.1b) • Q.2 • BF.1 (BF.1a) • BF.2 • IF.2 • IF.3 • LE.1 (LE.1a, LE.1b, LE.1c) •
8	LE.2 • LE.5 • REI.3
9	Interim Review – Interim 1 Testing
10	8 Unit 4: Introduction to Functions and Volume (8 Unit 5)
11	8.F.A.1 • 8.F.A.2 • 8.F.A.3 • 8.F.B • 8.F.B.4 • 8.F.B.5 • 8.G.C • 8.G.C.9
12	
13	ALG Unit 2: Linear and Exponential Equations
14	BF.1 (BF.1a) • BF.2 • IF.3 • IF.5 • IF.6 • IF.7 (IF.7a, IF.7e) • IF.8 (IF.8b) • IF.9 • LE.1 (LE.1a, LE.1b, LE.1c) • LE.2 • LE.3 • LE.5 • RN.1 • RN.2 • REI.10 • SSE.1 (SSE.1a) • SSE.2 • SSE.3
15	(SSE.3c) • CED.2
16	ALG Unit 3: Features of Functions
17	REI.10 • IF.1 • IF.2 • IF.4 • IF.5 • IF.7 (IF.7a, IF.7e) • BF.1 (BF.1b) • CED.2
18	Interim Review - Interim 2 Testing
19	ALG Unit 4: Equations and Inequalities
20	CED.1 • CED.4 • REI.1 • REI.3 • SSE.1 • Q.1 • Q.2
21	ALG Unit 5: Systems of Equations and Inequalities
22	CED.2 • CED.3 • CED.4 • REI.6 • REI.12
23	
24	ALG Unit 6: Quadratic Functions
25	CED.A.2 • SSE.1 (SSE.1a) • BF.1 (BF.1a) • IF.4 • IF.5 • IF.6 • IF.9 • LE.3
26	Interim 3 Review – Flexible Window for Interim 3 Testing
27	ALG Unit 7: Structures of Quadratic Expressions
28	BF.3 • BF.4 • IF.7 (IF.7a) • IF.8 (IF.8a) • APR.4 • SSE.2 • SSE.3 (SSE.3a, SSE.3b) • REI.4
29	(REI.4a, REI.4b) • REI.7
30	ALG Unit 8: More Functions, More Features
31	IF.2 • IF.5 • IF.7 (IF.7b) • BF.4 (BF.4a, BF.4c) • CED.4
32	
33	ALG Unit 9: Modeling Data
34	ID.A.1 ID.A.2 ID.A.3 • ID.5 • ID.6 (ID.6a, ID.6b, ID.6c) ID.7 • ID.8 • ID.9
35 - EOY	Review and Remediation

8th Grade AIM Detailed Year at a Glance

8 th Grade AIM Detailed Year at a Glance						
Week						
0	Routines and Procedures- Administer Pre-assessment					
1	8 Unit 1	Lesson 1	Lesson 2	Lesson 3	Lesson 4	Lesson 5
2	8 Unit 2	REVIEW / EOU 1 Assessment	Lesson 1	Lesson 2	Lesson 3	Lesson 4
3		Lesson 5	Lesson 6	Lesson 7	Lesson 8	Lesson 9
4	8 Unit 3	REVIEW	EOU 2 Assessment	Lesson 1	Lesson 2	Lesson 3
5		Lesson 4	Lesson 5	Lesson 6	Lesson 7	Lesson 8
6	ALG Unit 1	EOU 3 Assessment	Lesson 1 Part 1 & 2	Lesson 2	Lesson 3 Part 1 & 2	Lesson 4
7		Review/Quiz #1	Lesson 5	Lesson 6	Lesson 7	Review/Quiz #2
8		Lesson 8	Lesson 9	Lesson 10	REVIEW	ALG EOU 1 Assessment
9	Interim Review – Interim 1 Testing					
10	8 Unit 4	Lesson 1	Lesson 2	Lesson 3	Lesson 4	Lesson 5
11		Lesson 6	Lesson 7	Lesson 8	Lesson 9	Lesson 10
12		Lesson 11	Lesson 12	REVIEW	EOU 4 Assessment	Lesson 1
13	ALG Unit 2	Lesson 2 Part 1	Lesson 2 Part 2	Lesson 3	Review/Quiz #1	Lesson 4 Part 1
14		Lesson 4 Part 2	Lesson 5	Lesson 6	Lesson 7	Review/Quiz #2
15		Lesson 8	Lesson 9	Lesson 10	Lesson 11	REVIEW
16	ALG Unit 3	ALG EOU 2 Assessment	Lesson 1	Lesson 2	Lesson 3	Review/Quiz #1
17		Lesson 4	Lesson 5	REVIEW	ALG EOU 3 Assessment	Lesson 1 Part 1 & 2
18	Interim Review – Interim 2 Testing					
19	ALG Unit 4	Lesson 2	Lesson 3	Review/Quiz #1	Lesson 4	Lesson 5
20		Lesson 6	REVIEW	ALG EOU 4 Assessment	Lesson 1 Part 1	Lesson 1 Part 2
21	ALG Unit 5	Lesson 1 Part 3	Lesson 1 Part 4	Lesson 2	Lesson 3	Lesson 4
22		Review/Quiz #1	Lesson 5	Lesson 6	Lesson 7	Review/Quiz #2
23		Lesson 8	Lesson 9	Lesson 10	Review/Quiz #3	Review
24	ALG Unit 6	ALG EOU 5 Assessment	Lesson 1	Lesson 2	Lesson 3	Review/Quiz #1
25		Lesson 4	Lesson 5	Lesson 6	REVIEW	ALG EOU 6 Assessment
26	Interim 3 Review – Flexible Window for Interim 3 Testing					
27	ALG Unit 7	Lesson 1	Lesson 2	Lesson 3	Lesson 4	Lesson 5
28		Review/Quiz #1	Lesson 6	Lesson 7	Lesson 8	Lesson 9
29		Lesson 10	Review/Quiz #2	Lesson 11	Lesson 12	Lesson 13
30	ALG Unit 8	REVIEW	ALG EOU 7 Assessment	Lesson 1	Lesson 2	Review/Quiz #1
31		Lesson 3	Lesson 4	Lesson 5	Review/Quiz #2	Lesson 6
32		Lesson 7	REVIEW	ALG EOU 8 Assessment	Lesson 1	Lesson 2
33	ALG	Lesson 3	Lesson 4	Lesson 5	Review/Quiz #1	Lesson 6

34	Unit 9	Lesson 7	Lesson 8	Lesson 9	REVIEW	ALG EOU 9 Assessment
35 – EOY	Review and Remediation					

SAMPLE



You must be signed in to your NHA Google Account to access the links below.

1st Grade Moral Focus Year at-a-Glance

[Book List](#) [Virtue Definitions](#) Virtue Definition Posters - [B&W](#) or [Color](#)
[K-2 Goal Checks](#) [Moral Focus Contest Packets](#) - Deadline January 27th!
[Virtual Instruction Resources for PrepNet Virtual \(PVA\)](#)

Week 0 Lesson Plans

September

Wisdom: Understand the difference between right and wrong

- [Wisdom Virtue Progression](#)
- [Wisdom Monthly Overview](#)
 - [Wisdom Week 1 Lesson Plans](#)
 - [Wisdom Week 2 Lesson Plans](#)
 - [Wisdom Week 3 Lesson Plans](#)
 - [Wisdom Week 4 Lesson Plans](#)
- [Wisdom Choice Board](#)

October

Respect: Treat people and things around you with care

- [Respect Virtue Progression](#)
- [Respect Monthly Overview](#)
 - [Respect Week 1 Lesson Plans](#)
 - [Respect Week 2 Lesson Plans](#)
 - [Respect Week 3 Lesson Plans](#)
 - [Respect Week 4 Lesson Plans](#)
 - [Additional Respect Hero Lesson Plan](#)
- [Respect Choice Board](#)

November

Gratitude: Notice when someone is nice to you

- [Gratitude Virtue Progression](#)
- [Gratitude Monthly Overview](#)
 - [Gratitude Week 1 Lesson Plans](#)
 - [Gratitude Week 2 Lesson Plans](#)
 - [Gratitude Week 3 Lesson Plans](#)
 - [Gratitude Week 4 Lesson Plans](#)
 - [Additional Gratitude Hero Lesson Plan](#)
- [Gratitude Choice Board](#)

December

Self-control: Wait calmly and quietly for your turn

- [Self-control Virtue Progression](#)
- [Self-control Monthly Overview](#)
 - [Self-control Week 1 Lesson Plans](#)
 - [Self-control Week 2 Lesson Plans](#)
 - [Self-control Week 3 Lesson Plans](#)
 - [Self-control Week 4 Lesson Plans](#)
 - [Additional Self-control Hero Lesson Plan](#)
- [Self-control Choice Board](#)

January

Perseverance: Never give up

- [Perseverance Virtue Progression](#)
- [Perseverance Monthly Overview](#)
 - [Perseverance Week 1 Lesson Plans](#)
 - [Perseverance Week 2 Lesson Plans](#)
 - [Perseverance Week 3 Lesson Plans](#)
 - [Perseverance Week 4 Lesson Plans](#)
- [Perseverance Choice Board](#)

February

Courage: When you feel afraid, tell yourself you can do it

- [Courage Virtue Progression](#)
- [Courage Monthly Overview](#)
 - [Courage Week 1 Lesson Plans](#)
 - [Courage Week 2 Lesson Plans](#)
 - [Courage Week 3 Lesson Plans](#)
 - [Courage Week 4 Lesson Plans](#)
 - [Additional Courage Hero Lesson Plan](#)
- [Courage Choice Board](#)

March

Encouragement: Tell others they can do hard things

- [Encouragement Virtue Progression](#)
- [Encouragement Monthly Overview](#)
 - [Encouragement Week 1 Lesson Plans](#)
 - [Encouragement Week 2 Lesson Plans](#)
 - [Encouragement Week 3 Lesson Plans](#)
 - [Encouragement Week 4 Lesson Plans](#)
 - [Additional Encouragement Hero Lesson Plan](#)
- [Encouragement Choice Board](#)

April

Compassion: Be a friend when others feel sad or need help

- [Compassion Virtue Progression](#)
- [Compassion Monthly Overview](#)
 - [Compassion Week 1 Lesson Plans](#)
 - [Compassion Week 2 Lesson Plans](#)
 - [Compassion Week 3 Lesson Plans](#)
 - [Compassion Week 4 Lesson Plans](#)
- [Compassion Choice Board](#)

May

Integrity: Do the right thing, even when no one is looking

- [Integrity Virtue Progression](#)
- [Integrity Monthly Overview](#)
 - [Integrity Week 1 Lesson Plans](#)
 - [Integrity Week 2 Lesson Plans](#)
 - [Integrity Week 3 Lesson Plans](#)
 - [Integrity Week 4 Lesson Plans](#)
- [Integrity Choice Board](#)

SAMPLE



You must be signed in to your NHA Google Account to access the links below.

4th Grade Moral Focus Year at-a-Glance

[Book List](#) [Virtue Definitions](#) Virtue Definition Posters - [B&W](#) or [Color](#)
[3-8 Goal Checks](#) [Moral Focus Contest Packets](#) - Deadline January 27th!
[Virtual Instruction Resources for PrepNet Virtual \(PVA\)](#)

Week 0 Lesson Plans

September

Wisdom: Ask for help making good choices when you feel unsure

- [Wisdom Virtue Progression](#)
- [Wisdom Monthly Overview](#)
 - [Wisdom Week 1 Lesson Plans](#)
 - [Wisdom Week 2 Lesson Plans](#)
 - [Wisdom Week 3 Lesson Plans - Thomas Edison](#)
 - [Wisdom Week 3 Lesson Plans - Stephen Hawking](#)
 - [Wisdom Week 4 Lesson Plans](#)
 - [Additional Wisdom Hero Lesson Plan](#)
- [Wisdom Choice Board](#)

October

Respect: Treat others fairly without discrimination

- [Respect Virtue Progression](#)
- [Respect Monthly Overview](#)
 - [Respect Week 1 Lesson Plans](#)
 - [Respect Week 2 Lesson Plans](#)
 - [Respect Week 3 Lesson Plans](#)
 - [Respect Week 4 Lesson Plans](#)
- [Respect Choice Board](#)

November

Gratitude: Take time every day to think of good things

- [Gratitude Virtue Progression](#)
- [Gratitude Monthly Overview](#)
 - [Gratitude Week 1 Lesson Plans](#)
 - [Gratitude Week 2 Lesson Plans](#)
 - [Gratitude Week 3 Lesson Plans](#)
 - [Gratitude Week 4 Lesson Plans](#)
 - [Additional Gratitude Hero Lesson Plan](#)
- [Gratitude Choice Board](#)

December

Self-control: Put responsibility first, even when you're tempted not to

- [Self-control Virtue Progression](#)
- [Self-control Monthly Overview](#)
 - [Self-control Week 1 Lesson Plans](#)
 - [Self-control Week 2 Lesson Plans](#)
 - [Self-control Week 3 Lesson Plans](#)
 - [Self-control Week 4 Lesson Plans](#)
- [Self-control Choice Board](#)

January

Perseverance: Stick to your goal, even if it is hard or others discourage you

- [Perseverance Virtue Progression](#)
- [Perseverance Monthly Overview](#)
 - [Perseverance Week 1 Lesson Plans](#)
 - [Perseverance Week 2 Lesson Plans](#)
 - [Perseverance Week 3 Lesson Plans](#)
 - [Perseverance Week 4 Lesson Plans](#)
 - [Additional Perseverance Hero Lesson Plan](#)
- [Perseverance Choice Board](#)

February

Courage: Have the confidence to be yourself

- [Courage Virtue Progression](#)
- [Courage Monthly Overview](#)
 - [Courage Week 1 Lesson Plans](#)
 - [Courage Week 2 Lesson Plans](#)
 - [Courage Week 3 Lesson Plans](#)
 - [Courage Week 4 Lesson Plans](#)
- [Courage Choice Board](#)

March

Encouragement: Express confidence in others when they doubt themselves

- [Encouragement Virtue Progression](#)
- [Encouragement Monthly Overview](#)
 - [Encouragement Week 1 Lesson Plans](#)
 - [Encouragement Week 2 Lesson Plans](#)
 - [Encouragement Week 3 Lesson Plans](#)
 - [Encouragement Week 4 Lesson Plans](#)
- [Encouragement Choice Board](#)

April

Compassion: Help others as soon as you notice they need help

- [Compassion Virtue Progression](#)
- [Compassion Monthly Overview](#)
 - [Compassion Week 1 Lesson Plans](#)
 - [Compassion Week 2 Lesson Plans](#)
 - [Compassion Week 3 Lesson Plans](#)
 - [Compassion Week 4 Lesson Plans](#)
 - [Additional Compassion Hero Lesson Plan](#)
- [Compassion Choice Board](#)

May

Integrity: Do what needs to be done without being asked

- [Integrity Virtue Progression](#)
- [Integrity Monthly Overview](#)
 - [Integrity Week 1 Lesson Plans](#)
 - [Integrity Week 2 Lesson Plans](#)
 - [Integrity Week 3 Lesson Plans](#)
 - [Integrity Week 4 Lesson Plans](#)
- [Integrity Choice Board](#)

SAMPLE



You must be signed in to your NHA Google Account to access the links below.

7th Grade Moral Focus Year at-a-Glance

[Book List](#) [Virtue Definitions](#) Virtue Definition Posters - [B&W](#) or [Color](#)
[3-8 Goal Checks](#) [Moral Focus Contest Packets](#) - Deadline January 27th!
[Virtual Instruction Resources for PrepNet Virtual \(PVA\)](#)

Week 0 Lesson Plans

September

Wisdom: Use previous experience to gain insight and inform future decisions

- [Wisdom Virtue Progression](#)
- [Wisdom Monthly Overview](#)
 - [Wisdom Week 1 Lesson Plans](#)
 - [Wisdom Week 2 Lesson Plans](#)
 - [Wisdom Week 3 Lesson Plans](#)
 - [Wisdom Week 4 Lesson Plans](#)
- [Wisdom Choice Board](#)

October

Respect: Seek to understand, then be understood

- [Respect Virtue Progression](#)
- [Respect Monthly Overview](#)
 - [Respect Week 1 Lesson Plans](#)
 - [Respect Week 2 Lesson Plans](#)
 - [Respect Week 3 Lesson Plans](#)
 - [Respect Week 4 Lesson Plans](#)
- [Respect Choice Board](#)

November

Gratitude: Make a habit of paying attention to good things in your life

- [Gratitude Virtue Progression](#)
- [Gratitude Monthly Overview](#)
 - [Gratitude Week 1 Lesson Plans](#)
 - [Gratitude Week 2 Lesson Plans](#)
 - [Gratitude Week 3 Lesson Plans](#)
 - [Gratitude Week 4 Lesson Plans](#)
 - [Additional Gratitude Hero Lesson Plan](#)
- [Gratitude Choice Board](#)

December

Self-control: Resist the temptation of working for immediate rewards; work hard to earn recognition

- [Self-control Virtue Progression](#)
- [Self-control Monthly Overview](#)
 - [Self-control Week 1 Lesson Plans](#)
 - [Self-control Week 2 Lesson Plans](#)
 - [Self-control Week 3 Lesson Plans](#)
 - [Self-control Week 4 Lesson Plans](#)
- [Self-control Choice Board](#)

January

Perseverance: Maintain steady progress by anticipating and planning for setbacks

- [Perseverance Virtue Progression](#)
- [Perseverance Monthly Overview](#)
 - [Perseverance Week 1 Lesson Plans](#)
 - [Perseverance Week 2 Lesson Plans](#)
 - [Perseverance Week 3 Lesson Plans](#)
 - [Perseverance Week 4 Lesson Plans](#)
- [Perseverance Choice Board](#)

February

Courage: Stand up for yourself and others; put your beliefs into action

- [Courage Virtue Progression](#)
- [Courage Monthly Overview](#)
 - [Courage Week 1 Lesson Plans](#)
 - [Courage Week 2 Lesson Plans](#)
 - [Courage Week 3 Lesson Plans](#)
 - [Courage Week 4 Lesson Plans](#)
- [Courage Choice Board](#)

March

Encouragement: Help others to find the strength to look ahead and move forward

- [Encouragement Virtue Progression](#)
- [Encouragement Monthly Overview](#)
 - [Encouragement Week 1 Lesson Plans](#)
 - [Encouragement Week 2 Lesson Plans](#)
 - [Encouragement Week 3 Lesson Plans](#)
 - [Encouragement Week 4 Lesson Plans](#)
- [Encouragement Choice Board](#)

April

Compassion: Help and support others in a way that feels helpful to them

- [Compassion Virtue Progression](#)
- [Compassion Monthly Overview](#)
 - [Compassion Week 1 Lesson Plans](#)
 - [Compassion Week 2 Lesson Plans](#)
 - [Compassion Week 3 Lesson Plans](#)
 - [Compassion Week 4 Lesson Plans](#)
- [Compassion Choice Board](#)

May

Integrity: Be accountable for your actions

- [Integrity Virtue Progression](#)
- [Integrity Monthly Overview](#)
 - [Integrity Week 1 Lesson Plans](#)
 - [Integrity Week 2 Lesson Plans](#)
 - [Integrity Week 3 Lesson Plans](#)
 - [Integrity Week 4 Lesson Plans](#)
- [Integrity Choice Board](#)

SAMPLE

Sample ELA Lesson Plans

Unit 1/Week 1/Day 1		
Standards	RL.1.1 Ask and answer questions about key details in a text. RL.1.5 Explain major difference between texts that tell stories and texts that give information.	
I Can Statement	I can tell my favorite part of the story in a complete sentence. I can raise my hand to answer a question.	
Habits of Discussion to Reinforce	SL.1.1a Follow agreed-upon rules for discussions (e.g., listening to others with care, speaking one at a time about the topics and texts under discussion).	
Text Title	<i>Listen, Buddy</i> by Helen Lester, Illustrated by Lynn Munsinger	
Materials	<ul style="list-style-type: none"> Text Things Good Readers Do Anchor Chart (attached) 	
Before Reading		
5-10 minutes	Oral Drill	n/a
	Skill Introduction	<p>Say: Every day in first grade we get to share a book together. This week we are going to learn some things that good readers do when they listen to a story. One thing we need to practice is how to raise a silent hand when we want to answer a question. When I ask a question, you will raise your hand straight up in the air to let me know you want to share your answer. There is no need to talk while you wait for me to call on someone. Let's practice.</p> <p>Ask: What is your favorite color? (<i>My favorite color is blue.</i>) Use nonverbal cues to model for students how to raise their hand straight up with their mouths closed.</p> <p>Ask: What is your favorite food? (<i>My favorite food is pizza.</i>)</p> <p>Say: I really liked how everyone raised their hands and waited quietly for me to call on someone to answer.</p> <p>Say: We just learned something good readers do when listening to a story. Good readers take turns answering a question during a story by raising a silent hand. When I say, "show me," show me what you do when you want to answer a question. "Show me." (<i>Students raise their hands at a level zero.</i>)</p> <p>Say: Let's start a chart of things good readers do when they listen to a story. When good readers answer a question, they raise their hands without talking. That will be number one on our chart. Write on chart.</p>
	Build Background Knowledge/ Introduce Vocabulary	<p>Anytime you ask a question, reinforce expectations for raising a silent hand.</p> <p>Say: There are all different types of stories that we can read. There are stories that are true. There are stories that are made up. There are stories that are long and stories that are short. Today we are going to read a story that is made up. We call a story that is made up a fiction story.</p> <p>Ask: What do we call a story that is made up? (<i>A story that is made up is called a fiction story.</i>)</p>

	Introduce Text & Check for Understanding	<p>Say: The story we are reading today is called <i>Listen Buddy</i>. The author of this story is Helen Lester. The illustrator is Lynn Munsinger. It is a fiction story, or a story that is made up. While we read this story, I am going to stop and ask some questions. You will show me you are listening and ready to answer the question by raising a silent hand.</p> <p>Check for Understanding</p> <ul style="list-style-type: none"> Show me what good readers do when they want to answer a question. (<i>Students raise a silent hand.</i>) <p>Say: Nice work friends! Let's find out who Buddy is, and why he needs to listen.</p>
During Reading		
9-14 minutes	Think Alouds & Skill-based Comprehension Questions	<p>During today's read aloud, focus on reinforcing routines and procedures for answering questions by raising a silent hand.</p> <p>Stop after "...came home with fifty potatoes." – Think Aloud: Wow, even though Buddy has really big ears, he seems to have a hard time hearing. Look at this picture. Buddy's parents sent him to get squash and he thought they said wash. When they sent him to get tomatoes, he thought they said potatoes. I remember when my mom and dad would ask me things and I thought they said one thing, but the really said something different. The problem wasn't that I couldn't hear them. The problem was that I wasn't always really listening. I wonder if that is what is happening with Buddy. Let's keep reading to find out.</p> <p>Stop after "Buddy's mother said, 'Listen, Buddy!'" – Think Aloud: This story is kind of funny. Dad asked for a pen and Buddy brought him a hen. Mom asked for a slice of bread and Buddy brought her a slice of a bed. And look at this picture. He's so proud of himself. I bet his parents were starting to get a little frustrated with him though. I wonder what will happen next.</p> <p>Stop after "Right he went!" – Think Aloud: Ok, so it was kind of funny before when Buddy brought his parents the wrong things. This time when his parents were telling him directions he wasn't listening. This could be dangerous. He was supposed to go left, but he went right.</p> <p>Ask: Where does the path to the right lead? (<i>The path to the right leads to the cave of the Scruffy Varmint.</i>)</p> <p>Stop after "...sharp thorns from his paws." – Ask: What kind of things do varmints do? (<i>Varmints do things like snarling, mussing their hair, rubbing dirt on their knees, and scratching itches.</i>)</p> <p>Ask two or three students to share the different things that Varmints do. Make sure to reinforce procedure for raising a silent hand.</p> <p>Ask: What did the Scruffy Varmint ask Buddy to help with? (<i>The Scruffy Varmint asked Buddy to help gather firewood.</i>)</p>



		<p>Ask: What happened when Buddy brought the Scruffy Varmint a bundle of briarwood? (<i>When Buddy brought him a bundle of briarwood the Scruffy Varmint got poked by the sharp thorns.</i>)</p> <p>Say: I am so impressed with the good readers in this class. You all just did something good readers do when they listen to a story.</p> <ul style="list-style-type: none"> • Check for Understanding: <ul style="list-style-type: none"> ○ What did you do when I asked a question? (<i>When you asked a question, we raised our hands without talking and waited for you to call on us.</i>) <p>Stop after "...maybe it needed some pepper." – Ask: The Scruffy Varmint ordered Buddy to get the ingredients for the soup, but Buddy didn't bring what the Scruffy Varmint asked for. What things did Buddy bring him instead? (<i>Buddy brought the Scruffy Varmint flowers, five inches of salt, fifteen potatoes, and a load of wash.</i>)</p> <p>Stop after "...slice of bread, Buddy listened." – Ask: The Scruffy Varmint got frustrated with Buddy and yelled at him to just put the soup on the fire. What did Buddy do instead? (<i>Buddy put the soup in the fire.</i>)</p> <p>Ask: Why did Buddy finally listen? (<i>Buddy finally listened because he was afraid the Scruffy Varmint was going to eat him.</i>)</p> <ul style="list-style-type: none"> • Possible Prompts: <ul style="list-style-type: none"> ○ What kind of soup is the Scruffy Varmint going to make now? ○ What was the Scruffy Varmint going to do to Buddy? <p>Ask: How did Buddy change from the beginning of the story? (<i>Now Buddy listens and brings the right things.</i>)</p> <p>Say: You all just did something good readers do when they listen to a story.</p> <ul style="list-style-type: none"> • Check for Understanding: <ul style="list-style-type: none"> ○ What did you do when I asked a question? (<i>When you asked a question, we raised our hands without talking and waited for you to call on us.</i>)
After Reading		
<p style="text-align: center;">1-3 minutes</p>	<p>Check for Understanding</p>	<p>Say: When we read a story, it's fun to tell someone our favorite part. My favorite part of <i>Listen Buddy</i> was when the Scruffy Varmint said he was going to make bunny rabbit soup. That part made me laugh. If you want to pick your favorite part, think about what part made you laugh, or what part made you remember something, or what part taught you something new. Those are some ways you can choose your favorite part.</p> <p>Ask: What was your favorite part of the story? (<i>My favorite part of the story was when Buddy brought the Scruffy Varmint the wrong things to put in the soup.</i>)</p> <p>Say: Today we learned two things that good readers do. When I say, "show me," show me what good readers do when they want to answer a question.</p>



		<p>“Ready, show me.” (<i>Students raise a silent hand.</i>) We also learned that good readers tell others about what they are reading by telling their favorite part.</p> <p>Ask: What is one way you can choose your favorite part? (<i>One way to choose your favorite part is to think of a part that made you laugh.</i>)</p> <p>Say: Let’s add telling our favorite part to our chart of things good readers do. Write on chart.</p> <p>Say: You did an excellent job raising your hands to answer questions and we had a lot of fun reading a story together. I can’t wait to do it again tomorrow. Everyone say, “reading is fun.” (<i>Reading is fun!</i>)</p>
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SAMPLE



Things Good Readers Do

1. Raise a silent hand.
2. Tell my favorite part.
3. Track the speaker.
4. Answer in a complete sentence.
5. Use a loud and proud voice.
6. Name the Parts of the Book.
7. Hands down when someone is talking.
8. Use a silent thumbs up or thumbs down.
9. Turn and talk to my neighbor.

SAMPLE

Unit 1/Week 1/Day 1		
Standards		RL.1.1 Ask and answer questions about key details in a text. RL.1.5 Explain major difference between texts that tell stories and texts that give information.
I Can Statements		I can raise my hand to answer a question. I can tell my favorite part of the story in a complete sentence.
Habits of Discussion to Reinforce		SL.1.1a Follow agreed-upon rules for discussions (e.g., listening to others with care, speaking one at a time about the topics and texts under discussion).
Shared Reading Text		<i>Kerry Kangaroo Hops</i> by ReadWorks
Materials		<ul style="list-style-type: none"> Text (attached) Pictures of a kangaroo (attached) Skill Chart: Things Good Readers Do
Before Reading		
5-10 minutes	Quick Drill	*See <i>Quick Drill Scope and Sequence in K-2 handbook</i> , or plan based on needs identified from most recent progress monitoring data
	Review the Week's Comprehension Skill	Use Things Good Readers Do Chart to review raising a silent hand and telling my favorite part. Say: During Read Aloud we practiced doing two things good readers do. Ask: <ul style="list-style-type: none"> What two things did we learn how to do? (<i>We learned to raise a silent hand and how to tell our favorite part of a story.</i>) Show me how good readers share their thoughts about a book with their teacher and friends. (<i>Students raise a silent hand.</i>) Why is it important for readers to raise a silent hand? (<i>We show respect to each other by raising a silent hand and listening to what the speaker says.</i>) We also learned how to tell our favorite part of the story. What is one way you can choose your favorite part? (<i>One way to choose my favorite part is to think of a part that made me laugh.</i>)
	Build Background Knowledge	Reinforce raising a silent hand when students discuss. Show picture of a kangaroo to students. Say: This story is called <i>Kerry Kangaroo Hops</i> . A kangaroo is a type of animal called a marsupial. One thing I know about marsupials like kangaroos that make them special is that marsupials carry their babies in a pouch on their body. Show picture of baby kangaroo in pouch. Ask: What do you know about kangaroos?
	Introduce Vocabulary	As needed based on student population.
	Introduce Text & Check for Understanding	Say: The story we are reading today is called <i>Kerry Kangaroo Hops</i> . It is a fiction story, or a story that is made up. While we read this story, I am going to stop and ask some questions. I can't wait to see my good readers raising a silent hand to share their thoughts. Check for Understanding:

		<ul style="list-style-type: none"> Show me what good readers do when they want to share their thoughts about a story. (<i>Students raise a silent hand.</i>)
During Reading		
9-14 minutes	Think Alouds & Skill-based Comprehension Questions	<p>Teacher will stop reading after the first paragraph and then lead students in reading the same paragraph aloud chorally. Continue to reinforce Habits of Discussion from Read Aloud.</p> <p>Stop at “...needs to learn to hop.” – Think Aloud: I’ve noticed this story tells us about a baby kangaroo named Kerry and his Mother Kangaroo. Here in the words, I heard that Kerry Kangaroo is getting bigger and his mother said it’s time for him to learn how to hop. If I want to share my thoughts, I’m going to raise a silent hand.</p> <ul style="list-style-type: none"> Check for Understanding: <ul style="list-style-type: none"> What did I just do that good readers do? (<i>You raised a silent hand when you wanted to share your thoughts.</i>) <p>Teacher gradually releases the reading of the text through teacher reading, partner reading, and individual reading.</p> <p>Stop at “He even hopped with his eyes closed!” – Say: If you think you know Kerry’s actions and would like to share, raise a silent hand. (<i>Kerry was learning how to hop. He hopped a few times all over the place. He even hopped with his eyes closed.</i>)</p> <ul style="list-style-type: none"> Possible Prompt: <ul style="list-style-type: none"> What clues can you find in the words that show what was happening in the story? <p>Say: Wow! We were all able to listen and learn because so many good readers raised a silent hand to share. Great work good readers!</p> <p>Stop at “That was too much hopping for one day,” cried Kerry.” – Ask: How do you think Kerry is feeling right now? If you want to share out, raise a silent hand. (<i>I think Kerry is feeling tired. I know because earlier in the story, Kerry was hopping all over the place. Now Kerry just said, “That is too much hopping for one day!” That makes me think that Kerry hopped a lot and now had too much of it, he is tired and ready for a break.</i>)</p> <ul style="list-style-type: none"> Possible Prompts: <ul style="list-style-type: none"> What clues can you find in the words that show what Kerry’s actions were? What clues can you find in the words that show how Kerry is feeling? <p>Stop at “He fell fast asleep.” – Ask: Were we right? How was Kerry feeling at the end of the story? (<i>We were right, Kerry was tired from all that hopping!</i>)</p> <ul style="list-style-type: none"> Possible Prompt: <ul style="list-style-type: none"> What clues can you find in the words that show how Kerry is feeling?

		<p>Say: I noticed so many good readers raising a silent hand to share their thoughts about the story. When we raise a silent hand, we can learn a lot from each other.</p> <ul style="list-style-type: none"> • Check for Understanding: <ul style="list-style-type: none"> ○ Show me what good readers do when they want to share about a book. (<i>Students raise a silent hand.</i>) <p>Say: When we read a story, it's fun to share our favorite part. When you think about which part is your favorite, think about what part made you laugh, or what part made you remember something, or what part taught you something new. Those are some ways you can choose your favorite part.</p> <p>Ask: What was your favorite part of the story? (<i>My favorite part of the story was when Kerry got to learn how to hop.</i>) Call on 2 or 3 good readers raising a silent hand to share their favorite part of the story.</p>
After Reading		
1-3 minutes	Check for Understanding	<p>Say: Today, we learned two things that good readers do. Show me what good readers do when they want to share their thoughts about a book. (<i>Students raise a silent hand.</i>) We also learned that good readers tell others about what they are reading by telling their favorite part.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What is one way you can choose your favorite part? (<i>One way to choose my favorite part is to think of a part that made me laugh.</i>)

****Constructed Response for weeks 1-3 will be completed within your Writing Block (Unit 0). Constructed response will resume in your Shared Reading Block in weeks 4+.**



Kerry Kangaroo Hops

by ReadWorks



Kerry Kangaroo was growing up. Mama Kangaroo let him out of her pouch.

"You are getting big," said Mama. "Big kangaroo kids need to learn to hop."

Kerry tried out his strong legs and big feet. He hopped a few times. He hopped and hopped. He hopped away from Mama. He hopped here and there. He even hopped with his eyes closed!

Splash!

Kerry hopped right into a water hole! Mama Kangaroo helped Kerry out.

"That is too much hopping for one day!" cried Kerry.

He hopped back into his cozy pouch. He was tired. He fell fast asleep.



Kangaroo Pictures:



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Unit 1/Week 1/Day 1						
Standards	<p>RL.4.1 Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.</p> <p>RL.4.3 Describe in depth a character, setting, or event in a story or drama, drawing on specific details in the text.</p> <p>RL.4.5 Explain major differences between poems, drama, and prose, and refer to the structural elements of poems and drama when writing or speaking.</p>					
I Can Statements	<p>I can cite evidence from the text describing the plot of a text.</p> <p>I can elaborate on my response when prompted to "tell me more."</p>					
Habits of Discussion to Reinforce	<p>SL.4.1d Review the key ideas expressed and explain their own ideas and understanding in light of the discussion.</p>					
Annotation Focus	<p>STORY</p> <ul style="list-style-type: none"> • Setting (SE) • External and Internal Conflict (EC/IC) • Attempts to Resolve (ATR) • Solution (SO) <p>Execute lesson plan using provided questions. Remove charting of skill-aligned responses until class is effective with annotations.</p>					
Shared Reading Text	<p><i>To Catch the Wind: A Tale from the Marshall Islands</i> by Joyce Sidman</p>					
Materials	<ul style="list-style-type: none"> • Text (<i>annotate in text</i>) • Grades 4-5 PLOT/STORY annotations poster • Map of the Marshall Islands (attached) • What/How/Why Chart from Read Aloud <p>Text Structure: Narrative Plot</p> <p>What: Plot is the order of important events in a story that lead to the resolution of the problem. Some stories have more than one problem and more than one plot happening at the same time.</p> <p>How:</p> <ol style="list-style-type: none"> 1. Identify the Exposition (characters and setting). 2. Identify the Rising Action (conflicts and attempts to resolve). 3. Identify the Climax (conflict at its peak and there seems to be no possible solution). 4. Identify the Falling Action (solution). 5. Identify the Resolution (how the story ends). <p>Why: Good readers identify and keep track of the important events in each plot in the story to see how multiple conflicts are resolved.</p> <ul style="list-style-type: none"> • PLOT Tracker Chart: <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Narrative Plot Elements</th> <th style="width: 50%;">Evidence</th> </tr> </thead> <tbody> <tr> <td style="height: 20px;"> </td> <td> </td> </tr> </tbody> </table>		Narrative Plot Elements	Evidence		
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Before Reading						
5-10 minutes	Review the Week's Comprehension Skill	<p>Use the anchor chart from Read Aloud to review skill</p> <p>Ask:</p> <ul style="list-style-type: none"> • What skills did we work on in Read Aloud? (<i>We worked on text</i> 				

		<p><i>structure: narrative plot.)</i></p> <ul style="list-style-type: none"> • What is plot? (<i>Plot is the order of important events in a story that lead to the resolution of the conflict.</i>) • How do we determine the plot of a story? (<i>We look for the exposition, rising action, climax, falling action, and resolution.</i>) • Why do good readers pay attention to plot? (<i>Good readers pay attention to the plot to see how problems are resolved.</i>) <p>Say: Today and every day, we will also use evidence from the text to support our thinking and writing.</p>
Connect Review to Annotation		<p>Say: Today, we're also going to practice a new skill of annotating in the text as we identify certain parts of the plot. Great readers annotate plot elements because they help us make connections throughout the story. After we read, we use annotations to navigate the text and find evidence to support our thinking.</p> <p>Say: In K-2nd grade, you learned about the plot using STORY. Now, we are going to connect STORY to academic language around the plot. Show annotations poster and point to highlighted plot terms in each column stated below. As you can see, our Narrative Plot elements line up directly with STORY.</p> <p>S – Exposition (setting) T – Exposition (characters) O – Rising Action and Climax (oops there's a problem – conflict) R – Rising Action, Climax, and Falling Action (any time a character tries to solve a problem) Y – Resolution (Solution and Theme) (Yes! A Solution!)</p> <p>Say: Today, we are only going to focus on annotating for the S, O, R, and Y in STORY. We will come back to "Talking Characters" later. We will use the codes identified on our annotation poster and write a note in the margin for each letter.</p>
Build Background Knowledge		<p>Say: Today, we are going to read a folktale from the Marshall Islands. The Marshall Islands are small islands about 2,500 miles southwest of Hawaii.</p> <p>Show the map. A folktale is a story that helps humans cope with the world or explain the origin of something. Originally, folklore was passed down by word of mouth. Folklore contains the traditions and values of a culture. Today's folktale is from the Marshall Islands, which are islands in the Pacific Ocean near the equator. This means they are surrounded by water and far away from other lands. This story is set a long time ago before the people living on the Marshall Islands invented boats that allowed them to travel long distances and visit other lands.</p>
Introduce Vocabulary		<p>Lagoon – a stretch of saltwater separated from the sea by a low sandbar or coral reef</p> <p>Surpass – to exceed; be greater than</p> <p>Currents – a body of water or air moving in a definite direction</p>



	<p>Introduce Text & Check for Understanding</p>	<p>Say: Today, we are reading the folktale <i>To Catch the Wind: A Tale from the Marshall Islands</i> by Joyce Sidman. As we read, we are going to think about the text structure of a narrative plot. We are also going to annotate for the S, O, R, and Y in the plot.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> As we read, what skills are we going to be working on? (<i>We are working on text structure of a narrative plot and annotating for S, O, R, and Y in STORY.</i>) 						
<p>During Reading</p>								
<p>9-14 minutes</p>	<p>Think Alouds & Skill-based Comprehension Questions</p>	<p>Execute lesson plan using provided questions. Remove charting of skill-aligned responses until class is effective with annotations.</p> <p>Teacher will read the first paragraph. Continue to reinforce Habits of Discussion from Read Aloud. Model annotations on your Elmo.</p> <p>Stop on page 12, paragraph 1 after, "...on the rest of a wave." – Think Aloud: I'm stopping here because I noticed a part of the exposition – the setting. I know setting is where and when a story takes place. The text says, "Timur and his brothers lived far out in the middle of the ocean on Ailinglapalap Atoll, a tiny ring of islands." This tells me <i>where</i> the story takes place. I'm going to underline this evidence and write SE in the margin for "Setting." Now, I'm going to write a brief note in the margin about where the story takes place.</p> <p>Reveal: SE: Where – Small islands, middle of ocean.</p> <p>Continue Think Aloud: I also notice our sidebar tells us more about the Marshall Islands. I am going to write SE next to this information, as well.</p> <p>Write: SE next to "The Marshall Islands" sidebar</p> <p>Continue Think Aloud: You now have 15 seconds to underline the same evidence as me and write the annotation in the margin. Teacher counts down from 15 and monitors that students are writing correct annotation. We just annotated for the "S" in STORY. I know the "S" is also part of the exposition, so I am going to add this to my Narrative Plot Chart. Pre-chart evidence and inference and reveal.</p> <ul style="list-style-type: none"> Check for Understanding: <ul style="list-style-type: none"> What did I just do as a good reader? (<i>You figured out the setting, which is part of the exposition, and annotated for SE.</i>) How did I do that? (<i>You looked for where or when the story takes place. You underlined the evidence and wrote a short note in the margin with the code SE.</i>) <table border="1" data-bbox="537 1787 1474 1934"> <thead> <tr> <th data-bbox="537 1787 1005 1824">Narrative Plot Elements</th> <th data-bbox="1005 1787 1474 1824">Evidence</th> </tr> </thead> <tbody> <tr> <td colspan="2" data-bbox="537 1824 1474 1862">Exposition:</td> </tr> <tr> <td data-bbox="537 1862 1005 1934">Setting: small islands in the middle of the ocean.</td> <td data-bbox="1005 1862 1474 1934">Par. 1, "Timur and his brothers lived far out in the middle of the ocean on</td> </tr> </tbody> </table>	Narrative Plot Elements	Evidence	Exposition:		Setting: small islands in the middle of the ocean.	Par. 1, "Timur and his brothers lived far out in the middle of the ocean on
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		<p data-bbox="1019 176 1393 239">Ailinglapalap Atoll, a tiny ring of islands.”</p> <p data-bbox="537 285 1377 352">Teacher gradually releases the reading of the text through teacher reading, partner reading, and individual reading.</p> <p data-bbox="537 396 1438 428">Stop after page 12, paragraph 3 after, “...were as sharp as a shark’s.” –</p> <p data-bbox="537 434 1463 573">Think Aloud: I'm stopping because I noticed another part of the exposition – clues about a character. The text says, “Timur, the youngest, kept silent during these arguments... he was neither big nor strong and could never hope to surpass them.” I'm going to annotate for “T” in STORY.</p> <p data-bbox="537 617 792 644">Underline Evidence.</p> <p data-bbox="537 653 1065 680">Write: CT – inquisitive/ physically weaker.</p> <p data-bbox="537 724 1468 936">Continue Think Aloud: Timur is not as physically strong as his brothers. He is inquisitive because he enjoys listening and learning from stories. He also enjoys spending time with his mother over competing for strength. Inquisitive means you are curious about things and enjoy learning new things. He learns all about the currents and tides of the oceans from his mother's stories. Pre-chart evidence and inference and reveal.</p> <table border="1" data-bbox="537 980 1474 1352"> <thead> <tr> <th data-bbox="537 980 1008 1014">Narrative Plot Elements</th> <th data-bbox="1008 980 1474 1014">Evidence</th> </tr> </thead> <tbody> <tr> <td colspan="2" data-bbox="537 1020 1474 1054">Exposition:</td> </tr> <tr> <td data-bbox="537 1060 1008 1199">Setting: small islands in the middle of the ocean.</td> <td data-bbox="1008 1060 1474 1199">Par. 1, “Timur and his brothers lived far out in the middle of the ocean on Ailinglapalap Atoll, a tiny ring of islands.”</td> </tr> <tr> <td data-bbox="537 1205 1008 1344">Main Character: Timur – inquisitive/ youngest and physically weaker than older brothers.</td> <td data-bbox="1008 1205 1474 1344">Par. 2, “Timur, the youngest, kept silent during these arguments...he was neither big nor strong and could never hope to surpass them.”</td> </tr> </tbody> </table> <p data-bbox="537 1388 1468 1640">Continue Think Aloud: Also, I think Timur might feel insecure because he is not as strong as his brothers. This is the “Rising Action” because it is giving me clues about a conflict, and it’s part of the “O” in STORY. I am going to annotate by underlining the evidence in my text. Underline the same evidence as above. Now I'm going to write a note about an internal conflict because Timur has a negative feeling. When we annotate for internal conflict, we name the negative feeling and the reason why the character feels that way.</p> <p data-bbox="537 1684 1419 1751">Write: IC: Timur feels insecure because his brothers are physically stronger than him and enjoy competitive activities he isn't as good at.</p> <p data-bbox="537 1795 1474 1892">Say: You now have 15 seconds to copy my annotation. Count down from 15 while monitoring students' work. Also, reveal notes on rising action in the chart.</p> <ul data-bbox="586 1902 959 1934" style="list-style-type: none"> • Check for Understanding: 	Narrative Plot Elements	Evidence	Exposition:		Setting: small islands in the middle of the ocean.	Par. 1, “Timur and his brothers lived far out in the middle of the ocean on Ailinglapalap Atoll, a tiny ring of islands.”	Main Character: Timur – inquisitive/ youngest and physically weaker than older brothers.	Par. 2, “Timur, the youngest, kept silent during these arguments...he was neither big nor strong and could never hope to surpass them.”
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- What did I just do as a good reader? (*You figured out more of the exposition and the rising action. You also annotated for the IC.*)
- How did I do that? (*You looked for clues about characters and the conflict and wrote the negative feeling and reason in the margin.*)

Narrative Plot Elements	Evidence
<u>Rising Action:</u>	
IC: Timur feels insecure because his brothers are physically stronger than him and enjoy competitive activities he isn't as good at.	Par. 2, "Timur, the youngest, kept silent during these arguments...he was neither big nor strong and could never hope to surpass them."

Teacher gradually releases the reading of the text through teacher reading, partner reading, and individual reading.

Stop on page 13 after "...wonder what lay beyond the dancing waves." – Ask: Why does Timur "wonder what lay beyond the dancing waves?" (*Timur wonders this because they live on small islands in the middle of the ocean and have never seen any other part of the world. His mother said about the wind, "If we could catch it, we could go anywhere, perhaps even beyond the Ailinglapalap." This makes me think Timur wants to "catch the wind" and explore other parts of the world.*)

- Possible Prompts:
 - What do you know about the setting?
 - How might the setting impact the character?
 - What does Timur's mother say to him?
 - How might that impact Timur's motivation?

Stop at the bottom of page 13 after "...he began to cherish hopes of winning the race." – Ask: What did we just learn about Timur's motivation? (*We learned that Timur wants to beat his brothers in the race because the text says, "He longed to have the fine net, which would bring him luck fishing."*)

Ask: How does that impact the plot? (*It is another conflict and part of the "Rising Action" because he is not likely to win since he is much weaker than his brothers. The text says, "Although his chances were poor, he began to cherish hopes of winning the race."*)

- Possible Prompts:
 - What are Timur's actions, dialogue, and thoughts at this moment?
 - What might get in the way of Timur getting what he wants?
 - What part of the plot does this moment connect to?

Say: Nice work! You just identified another conflict in the story – the external conflict! This is an external conflict because the conflict is caused by other characters – Timur's brothers are stronger and likely to beat him. I'm going to annotate for the external conflict because it's part of the "O" in STORY. I'm

		<p>thinking about what Timur WANTS and why he CANNOT have it. First, we underline the evidence. Underline evidence from exemplar responses above.</p> <p>Say: Now, I am going to use our sentence stem and write the conflict in the margin.</p> <p>Reveal: EC: Timur wants to beat his brothers in the race, but he is much weaker than them and not likely to win.</p> <p>Say: You now have 15 seconds to copy my annotation. Count down from 15 while monitoring students' work. Also, reveal notes on rising action in the chart.</p> <table border="1" data-bbox="537 684 1476 1094"> <thead> <tr> <th data-bbox="537 684 1008 722">Narrative Plot Elements</th> <th data-bbox="1008 684 1476 722">Evidence</th> </tr> </thead> <tbody> <tr> <td colspan="2" data-bbox="537 722 1476 760">Rising Action:</td> </tr> <tr> <td data-bbox="537 760 1008 909">IC: Timur feels insecure because his brothers are physically stronger than him and enjoy competitive activities he isn't as good at.</td> <td data-bbox="1008 760 1476 909">Par. 2, "Timur, the youngest, kept silent during these arguments...he was neither big nor strong and could never hope to surpass them."</td> </tr> <tr> <td data-bbox="537 909 1008 1094">EC: Timur wants to beat his brothers in the race, but he is much weaker than them and not likely to win.</td> <td data-bbox="1008 909 1476 1094">Par. 9, "He longed to have the fine net, which would bring him luck fishing. Although his chances were poor, he began to cherish hopes of winning the race."</td> </tr> </tbody> </table> <p>Stop in the middle of page 14 after "...the power of the wind!' Timur cried." – Ask: Why do you think the author describes the "mat of woven pandanus leaves" being blown around by the wind? (<i>I think the author describes this because it shows how powerful the wind is. Timur has always been fascinated by the wind, and the author keeps bringing it up, so the wind may impact the plot of the story or help Timur. Maybe he will use the wind to win the race! OR He might have the idea to create a sail using the mat and the wind. NOTE: If your students are struggling and do not have the background knowledge about sailboats/sails to get this correct, wait until the end of the story and re-ask this question.</i>)</p> <ul style="list-style-type: none"> • Possible Prompts: <ul style="list-style-type: none"> ○ What do you know about the use of wind for boat travel? ○ How could the wind's power impact Timur's conflict? ○ What predictions can you make around Timur's actions regarding the wind? <p>Stop in the middle of page 14 after "...the wind blowing in and out of his dreams." – Ask: Why does Timur have trouble sleeping? (<i>Timur has trouble sleeping because he is thinking about how powerful the wind is because he saw his mother's roof come off, and the wind was "tugging it this way and that." He is likely thinking of a way the wind could help him win the race.</i>)</p> <ul style="list-style-type: none"> • Possible Prompts: 	Narrative Plot Elements	Evidence	Rising Action:		IC: Timur feels insecure because his brothers are physically stronger than him and enjoy competitive activities he isn't as good at.	Par. 2, "Timur, the youngest, kept silent during these arguments...he was neither big nor strong and could never hope to surpass them."	EC: Timur wants to beat his brothers in the race, but he is much weaker than them and not likely to win.	Par. 9, "He longed to have the fine net, which would bring him luck fishing. Although his chances were poor, he began to cherish hopes of winning the race."
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		<ul style="list-style-type: none"> ○ What happens in the story right before Timur tosses and turns? ○ What do you know about Timur's motivation? ○ How might the wind impact his motivation? <p>Say: Nice job! You just identified more of the “Rising Action” by thinking about the way the conflict is developing. The character is thinking about ways to solve his conflict, which is the R in STORY – attempts to resolve! When we annotate for ATR, all we do is underline our evidence and write ATR in the margin.</p> <p>Underline: But Timur tossed and turned all night, the wind blowing in and out of his dreams.</p> <p>Say: I'm underling this evidence because it shows me Timur cannot sleep because he's thinking hard about how to solve his problem using the wind.</p> <p>Write: ATR in the margin</p> <p>Say: You now have 10 seconds to underline the evidence and copy my annotation. Count down from 10 and monitor students' work.</p> <p>Stop at the end of page 14 after, “But the wind will be with me all the way, he thought.”</p>
After Reading		
1-2 minutes	Check for Understanding	<p>Say: You did a fantastic job practicing our skill for today and annotating! We will continue working on this skill tomorrow.</p> <p>Check for understanding:</p> <ul style="list-style-type: none"> • What skill are we working on this week? (<i>We are working on text structure: narrative plot</i>) • What is plot? (<i>Plot is the order of important events in a story that lead to the resolution of the conflict.</i>) • How do we determine the plot of a story? (<i>We look for the exposition, rising action, climax, falling action, and resolution.</i>) • Why do good readers pay attention to plot? (<i>Good readers pay attention to plot to see how problems are resolved.</i>)

****Constructed Response for weeks 1-3 will be completed within your Writing Block (Unit 0). Constructed response will resume in your Shared Reading Block in weeks 4+.**



Unit 1/Week 1/Day 1						
Standards	<p>RL.4.1 Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.</p> <p>RL.4.3 Describe in depth a character, setting, or event in a story or drama, drawing on specific details in the text.</p>					
I Can Statements	<p>I can cite evidence from the text describing the plot of a text.</p> <p>I can elaborate on my response when prompted to "tell me more."</p>					
Habits of Discussion to Reinforce	SL.4.1d Review the key ideas expressed and explain their own ideas and understanding in light of the discussion.					
Text Title	John Henry by Julius Lester (p. 1-20)					
Materials	<ul style="list-style-type: none"> Text What/How/Why Charts for Text Structure: Narrative Plot and Citing Evidence Prewritten PLOT Tracker (see during reading) <table border="1" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th style="width: 50%; padding: 5px;">PLOT Elements</th> <th style="width: 50%; padding: 5px;">Evidence</th> </tr> </thead> <tbody> <tr> <td style="height: 20px;"> </td> <td> </td> </tr> </tbody> </table>		PLOT Elements	Evidence		
PLOT Elements	Evidence					
Before Reading						
5-10 minutes	Oral Drill	<ul style="list-style-type: none"> What is conflict? (<i>A problem that develops because a character wants something but cannot have it. It can also be a negative feeling because they do not get what they want.</i>) What is a setting? (<i>where or when a story takes place</i>) What is a character trait? What are some examples? (<i>A word to describe what a character is like – smart, funny, gullible, mischievous, etc.</i>) 				
	Skill Introduction	<p>Say: As we read, we are going to think about PLOT.</p> <p>Text Structure: Narrative Plot</p> <p>What: Plot is the order of important events in a story that lead to the resolution of the problem. Some stories have more than one problem and more than one plot happening at the same time.</p> <p>How:</p> <ol style="list-style-type: none"> 1. Identify the Exposition (characters and setting). 2. Identify the Rising Action (conflicts and attempts to resolve). 3. Identify the Climax (conflict at its peak and there seems to be no possible solution). 4. Identify the Falling Action (solution). 5. Identify the Resolution (how the story ends). <p>Why: Good readers identify and keep track of the important events in each plot in the story to see how multiple conflicts are resolved.</p> <p>Say: When we talk about the text structure, we must support our answers we text evidence.</p> <p>Citing Evidence</p> <p>What: Today, we are going to cite evidence around _____. Citing evidence is finding proof in the pictures or text to prove your thinking. We now have to find the best evidence to support our thinking.</p> <p>How:</p>				

		<ol style="list-style-type: none"> 1. Turn to the part of the story in the book that we are talking/thinking about. 2. Read the words and find all of the evidence to prove your thinking. 3. Ask, "Which TWO pieces of evidence best support my thinking?" 4. Share your evidence by saying, "In the text, on page __, it says..." 5. When other readers share their evidence, be thinking, "Is that the best evidence to support the answer? Can I find a different/better piece of evidence?" <p>Why: Good readers cite the best evidence to prove their thinking!</p>
	Build Background Knowledge	<p>Say: Today, we are going to read a folktale about a man named John Henry. A folktale is a story that has been passed down orally throughout generations in a culture. They are told to pass on traditions and life lessons, and they often have fantastical elements such as talking animals, magic, or other unrealistic elements. Folktales are also called legends – a story passed down from history that has a famous, sometimes mythical, person or create that is also called a legend!</p>
	Introduce Vocabulary	As needed based on student population
	Introduce Text & Check for Understanding	<p>Say: This story is a folktale about an ex-slave named John Henry who lived in West Virginia. I'm so excited to read this famous story with you and keep passing it on! Remember, as we read, we are looking for parts of a narrative plot. Since this is the beginning of the story, we are looking for clues about the characters, the setting, and the conflicts. When we find the parts of the narrative plot, we will cite our evidence.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill are we working on this week? (<i>text structure: narrative plot</i>) • What is plot? (<i>the order of important events in a story that lead to the resolution of the conflict</i>) • How do we determine the plot of a story? (<i>We look for the exposition, rising action, climax, falling action, and resolution.</i>) • Why do we pay attention to plot? (<i>to see how problems are resolved</i>)
During Reading		
9-14 minutes	Think Alouds & Skill-based Comprehension Questions	<p>Stop on page 5 after "After lunch he chopped down an acre of trees..." – Think Aloud: I'm already starting to think about the narrative plot. Because this is a folktale, I am thinking about this story taking place in the past. I noticed in the pictures on pages 5 and 6 that the characters are living in log cabins, and John Henry is chopping wood for fires. I also already know from reading the back cover that John Henry's family are ex-slaves. This story must take place after the Civil War, roughly around 1870! That's our setting.</p> <ul style="list-style-type: none"> • Check for Understanding: <ul style="list-style-type: none"> ○ What did I just do as a good reader? (<i>You figured out the setting.</i>) ○ How did I do that? (<i>You paid attention to where or when the story takes place.</i>) <p>Continue Think Aloud: I'm also starting to characterize John Henry. I am going to cite my evidence by stating the page I noticed his dialogue to the sun:</p>

On page 5, the text said, “He hollered up into the sky, ‘Get up from there! I got things to do and I need light to do ‘em by.’” This text evidence makes me think that JH is a determined, hard working person – a go-getter! He also seems to have superhuman strength due to his actions – again, I will cite my evidence. On page 5, the text says he was able to “rebuild the porch...added a wing onto the house with an indoor swimming pool...chopped down an acre of trees...and still had time for a nap before supper.” That is a LOT of work for one day!

Pre-chart this evidence/key ideas and reveal:

PLOT Elements	Evidence
<p>EXPOSITION</p> <p>Setting – folktale set in 1870’s, post- Civil War America</p> <p>Characters – John Henry is hardworking, determined, and has super-human strength/speed</p>	<p>Picture on pg. 6</p> <p>Inner Sleeve Evidence: “...between 1870-1873...This is the site of the Black folk ballad ‘John Henry’ on which this text is based.”</p> <p>Pg. 5, “He hollered up into the sky, ‘Get up from there! I got things to do and I need light to do ‘em by.’”</p> <p>Pg. 5, ““rebuild the porch...added a wing onto the house with an indoor swimming pool...chopped down an acre of trees...and still had time for a nap before supper.”</p>

Say: Great job! We just identified the **exposition** of this text. We looked for clues of the setting and the characters.

- **Check for Understanding:**
 - What did I just do as a good reader? (*You found the setting and characterized John Henry.*)
 - How did I do that? (*You paid attention to where and when the story takes place and the character’s actions and dialogue and determined trait words to describe the character.*)
 - How did I cite my evidence? (*You found in the text the sentences that prove your thinking. You named the page where you found you evidence.*)

Stop after page 20 – Turn and Talk: Why did John Henry stop and offer to “lend them [the road building crew] a hand”? What’s your evidence? (*John Henry knew that he could use his incredible strength to get rid of the boulder, and he is a kind, hard-working man who wants to make the world a better place and help others.*) I know because in the text it says: Pg. 11, “John Henry decided it was time for him to go on down the big road...His daddy said, ‘You got to have something to make your way in the word with, Son.’” **Chart evidence students share pre-written chart.**

Say: As we are discussing, I might say **tell me more**. This means that I want you to **elaborate**. That means that you're on the right track, and I want you to build onto your thinking and explain more about how you came to that understanding! You should say something new that adds on to what you already said.

- Possible Prompts:
 - What are John Henry's dialogue/actions?
 - What happens in the text right before this moment? (*John Henry leaves to "make his mark"*)
 - What do we already know about John Henry and how do those traits connect to this moment?
 - What does John Henry want?
 - How do the other characters view him?

PLOT Elements	Evidence
<p><u>RISING ACTION:</u> Conflict: John Henry knew that he could use his incredible strength to get rid of the boulder, and he is a kind, hard-working man who wants to make the world a better place and help others.</p>	<p>Pg. 11, "John Henry decided it was time for him to go on down the big road...His daddy said, 'You got to have something to make your way in the world with, Son.'"</p> <p>Pg. 15, "It was John Henry, laughing. He said, 'If you gentlemen would give me a little room, I got some work to do.' 'Don't see how you could do what dynamite couldn't, said the boss of the crew.' John Henry chuckled. 'Just watch me.'"</p> <p>Pg. 17, "John Henry was swinging the hammers so fast, he was making a rainbow around his shoulders."</p> <p>Pg. 19, "Folks could not believe their eyes. The boulder was gone. In its place was the prettiest and straightest road they had ever seen. Not only had John Henry pulverized the boulder into pebbles, he had finished building the road."</p>

Say: Nice work! You just described character traits about John Henry (hard working, kind, strong), and his motivation (wants to make a mark in the world by making the world a better place), which is part of the conflict of this story, which is a part of the rising action! You also were able to cite your evidence by finding the two pieces of evidence that best support your thinking on that page. When you spoke, you told me what page your evidence was on. This is citing evidence!

		<p>Say: The conflict in this story is that John Henry wants to use his incredible strength to help others, and he is determined to make a difference. I am sure there will be other obstacles, like this giant rock, that get in the way. We identified the exposition and rising action of this plot! Tomorrow, we will focus on climax, and falling action, and resolution.</p>
After Reading		
1-3 minutes	Check for Understanding	<p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill are we working on this week? (<i>text structure: narrative plot</i>) • What is plot? (<i>the order of important events in a story that lead to the resolution of the conflict</i>) • How do we determine the plot of a story? (<i>We look for the exposition, rising action, climax, falling action, and resolution.</i>) • Why do we pay attention to plot? (<i>to see how problems are resolved</i>)

SAMPLE

Unit 1/Week 1/Day 2						
Standards	<p>RL.4.1 Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.</p> <p>RL.4.3 Describe in depth a character, setting, or event in a story or drama, drawing on specific details in the text.</p>					
I Can Statements	<p>I can cite evidence from the text describing the plot of a text.</p> <p>I can elaborate on my response when prompted to "tell me more."</p>					
Habits of Discussion to Reinforce	<p>SL.4.1d Review the key ideas expressed and explain their own ideas and understanding in light of the discussion.</p>					
Text Title	<p><i>John Henry</i> by Julius Lester (p. 21-40)</p>					
Materials	<ul style="list-style-type: none"> Text What/How/Why Charts for Text Structure: Narrative Plot and Citing Evidence Prewritten PLOT Tracker (see during reading) <table border="1" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th style="width: 50%; padding: 5px;">PLOT Elements</th> <th style="width: 50%; padding: 5px;">Evidence</th> </tr> </thead> <tbody> <tr> <td style="height: 20px;"> </td> <td> </td> </tr> </tbody> </table>		PLOT Elements	Evidence		
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Before Reading						
5-10 minutes	<p>Oral Drill</p> <hr/> <p>Skill Introduction</p>	<ul style="list-style-type: none"> What is conflict? (<i>A problem that develops because a character wants something but cannot have it. It can also be a negative feeling because they do not get what they want.</i>) What is a setting? (<i>Where or when a story takes place</i>) What is a character trait? What are some examples? (<i>A word to describe what a character is like – smart, funny, gullible, mischievous, etc.</i>) <p>Say: Let's quickly review the parts of narrative plot and how we identify them.</p> <p>Text Structure: Narrative Plot</p> <p>What: Plot is the order of important events in a story that lead to the resolution of the problem. Some stories have more than one problem and more than one plot happening at the same time.</p> <p>How:</p> <ol style="list-style-type: none"> 1. Identify the Exposition (characters and setting). 2. Identify the Rising Action (conflicts and attempts to resolve). 3. Identify the Climax (conflict at its peak and there seems to be no possible solution). 4. Identify the Falling Action (solution). 5. Identify the Resolution (how the story ends). <p>Why: Good readers identify and keep track of the important events in each plot in the story to see how multiple problems are resolved.</p> <p>Say: When we talk about the text structure, we must support our answers with text evidence.</p> <p>Citing Evidence</p> <p>What: Today, we are going to cite evidence around _____. Citing evidence is finding proof in the pictures or text to prove your thinking. We now have to find the best evidence to support our thinking.</p> <p>How:</p>				

		<ol style="list-style-type: none"> 1. Turn to the part of the story in the book that we are talking/thinking about. 2. Read the words and find all of the evidence to prove your thinking. 3. Ask, "Which TWO pieces of evidence best support my thinking?" 4. Share your evidence by saying, "In the text, on page __, it says..." 5. When other readers share their evidence, be thinking, "Is that the best evidence to support the answer? Can I find a different/better piece of evidence?" <p>Why: Good readers cite the best evidence to prove their thinking!</p>
	Build Background Knowledge	As needed based on student population
	Introduce Vocabulary	As needed based on student population
	Introduce Text & Check for Understanding	<p>Say: Today, we are going to continue reading the folktale about John Henry. Let's review what we learned yesterday.</p> <p>Ask: What is the setting of this story? (<i>It's set in the past during post-Civil War America – likely around 1870.</i>)</p> <p>Ask: What is John Henry like? How did we characterize him? (<i>He is a kind, hard-working, determined ex-slave with super-human strength. He wants to make his mark in the world and use his abilities to help others.</i>)</p> <p>Say: Now as we continue to read, we are going to focus on the climax of the story, the falling action, and the resolution while we cite evidence from the text that proves our thinking.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill are we working on this week? (<i>text structure: narrative plot</i>) • What is plot? (<i>the order of important events in a story that lead to the resolution of the conflict</i>) • How do we determine the plot of a story? (<i>We look for the exposition, rising action, climax, falling action, and resolution.</i>) • Why do we pay attention to plot? (<i>to see how problems are resolved</i>)
During Reading		
9-14 minutes	Think Alouds & Skill-based Comprehension Questions	<p>Say: We're going to pick up on pg. 21. Remember, John Henry had just crushed the boulder and built a road.</p> <p>Stop on page 29 after "In the light from the tongues of fire shooting out of the tunnel..." – Think Aloud: John Henry going against the steam engine is the largest, most difficult problem John Henry has tried to solve for others. I know because on page 26, there is dramatic language in the text such as, "What he saw was a mountain as big as hurt feelings. On one side was a big machine hooked up to hoses. It was belching smoke and steam. As the machine attacked the mountain, rocks and dirt and underbrush flew into the air." The mountain is so huge, and the steam engine is working well, so it seems like John Henry may not beat it. Since this seems like an unsolvable</p>

		<p>problem, this is the climax of the story. Also, John Henry has to work all night to try to beat the machine. In the text it says, “All through the night John Henry and the steam drill went at it.” Again, this problem seems intense and possibly unsolvable.</p> <p>Stop after page 32 – Turn and Talk: What happens after John Henry beats the steam engine? How does this connect to the plot? (<i>John Henry dies because he worked so hard to beat the steam engine. This is another climactic moment because our main character is dead, and it seems like there is no solution to this problem. I know because in the text it says, “With a smile John Henry’s eyes closed, and slowly he fell to the ground. John Henry was dead.” Also, everyone is very sad because of this. The text says, “Everybody was silent for a minute. Then came the sound of soft crying.”</i>)</p> <ul style="list-style-type: none"> • Possible Prompts: <ul style="list-style-type: none"> ○ What important events just occurred? (<i>John Henry just beat the steam engine, but he died doing it.</i>) ○ What part of plot does this connect to? (<i>The climax because all of John Henry’s problems of helping others seem to have no solution. He is dead.</i>) <p>Pre-chart first climax and reveal and then chart in the moment during discussion for second climax.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">PLOT Elements</th> <th style="width: 50%;">Evidence</th> </tr> </thead> <tbody> <tr> <td> <p>Climax – John Henry tries to beat the steam engine.</p> </td> <td> <p>Pg. 26, “What he saw was a mountain as big as hurt feelings. On one side was a big machine hooked up to hoses. It was belching smoke and steam. As the machine attacked the mountain, rocks and dirt and underbrush flew into the air.”</p> <p>Pg. 29, “All through the night John Henry and the steam drill went at it.”</p> </td> </tr> <tr> <td> <p>Climax – John Henry dies due to his effort, and it seems like this story cannot have a happy ending.</p> </td> <td> <p>Pg. 32, “With a smile John Henry’s eyes closed, and slowly he fell to the ground. John Henry was dead.”</p> <p>Pg. 32, “Everybody was silent for a minute. Then came the sound of soft crying.”</p> </td> </tr> </tbody> </table> <ul style="list-style-type: none"> • Check for Understanding: <ul style="list-style-type: none"> ○ What did I just do as a good reader? (<i>You figured out the climax.</i>) ○ How did I do that? (<i>You paid attention to the dramatic language and saw clues that this is a large problem the character may not solve.</i>) ○ How did I cite my evidence? (<i>You found the best information from the text that supports you thinking. You named the page it was on.</i>) 	PLOT Elements	Evidence	<p>Climax – John Henry tries to beat the steam engine.</p>	<p>Pg. 26, “What he saw was a mountain as big as hurt feelings. On one side was a big machine hooked up to hoses. It was belching smoke and steam. As the machine attacked the mountain, rocks and dirt and underbrush flew into the air.”</p> <p>Pg. 29, “All through the night John Henry and the steam drill went at it.”</p>	<p>Climax – John Henry dies due to his effort, and it seems like this story cannot have a happy ending.</p>	<p>Pg. 32, “With a smile John Henry’s eyes closed, and slowly he fell to the ground. John Henry was dead.”</p> <p>Pg. 32, “Everybody was silent for a minute. Then came the sound of soft crying.”</p>
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Stop after page 37 – Turn and Talk: What causes all the workers to start clapping? Cite your evidence. What part of plot do you think this is? (*The workers start clapping because the text said on page 36, someone whispered “Dying ain’t important. Everybody does that. What matters is how well you do your living.” This caused them to change their perspective and feelings of sadness due to John Henry’s death to celebrating the great life that John Henry led. I know because on page 37, it says, “They were cheering...” This is the falling action, and I know because the author is starting to tie up loose ends and beginning to resolve the conflict. is when a problem is solved. Their change in perspective is solving the problem of sadness.*) **Prompt students to elaborate on their answer by saying “tell me more” as appropriate. Add this falling action and evidence to the existing plot chart. See example below.**

- Possible Prompts:
 - What caused the characters’ feelings to change? (*The characters’ heard a voice say that dying doesn’t matter, but how you lived your life matters more.*)
 - Why does this cause them to cheer? (*They want to celebrate his life.*)

PLOT Elements	Evidence
Falling Action: townsfolk are now celebrating John Henry’s life instead of being sad about his death.	Pg. 36, “Dying ain’t important. Everybody does that. What matters is how well you do your living” Pg. 37, “They were cheering and shouting through their tears: ‘John Henry! John Henry!’”!

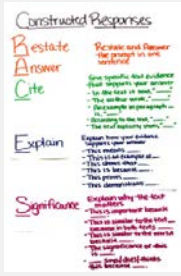
Last page – Turn and Talk: Why might you hear the song at the end of the text if you walk by the White House late at night? Why does the author include this in the text? (*You might hear this because the text says on page 38, John Henry was supposedly buried on the White House lawn, and the author is hinting that John Henry’s ghost might sing this song since he sang it earlier in the text. This is the resolution because the conflict is solved.*)

- Possible Prompts:
 - How does this moment connect to earlier in the text? (*John Henry sang this song while hammering the boulder earlier in this text.*)
 - Why is that important? (*Because John Henry is buried at the White House, so his ghost must be singing this song.*)
 - What part of plot does this connect to? (*Falling Action because the author is wrapping up loose ends in the story and telling us where John Henry is buried.*)

PLOT Elements	Evidence
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		<p>Resolution: John Henry is remembered for his generous, hardworking spirit, and his story is passed down through generations.</p>	<p>Pg. 38, "Some say he was buried on the White House lawn late one night..."</p> <p>Pg. 38, "If you walk by the White House late at night, stand real still, and listen real closely, folks say you just might he</p>
<p>Say: Wow! We just found all parts of plot! This is the resolution because the conflict is resolved. John Henry helped others, and now his story is a legend everywhere.</p>			
<p>After Reading</p>			
<p>1-3 minutes</p>	<p>Check for Understanding</p>	<p>Say: Nice work! As great readers, we were able to identify all parts of plot in this story! I can't wait to see us use parts of plot to understand the complex texts we will continue to read this year.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill are we working on this week? (<i>text structure: narrative plot</i>) • What is plot? (<i>the order of important events in a story that lead to the resolution of the conflict</i>) • How do we determine the plot of a story? (<i>We look for the exposition, rising action, climax, falling action, and resolution.</i>) • Why do we pay attention to plot? (<i>to see how problems are resolved</i>) 	



Lesson Preview	
Objectives	I can identify the elements of a well-written constructed response. I can identify run-on sentences.
Standards	RL.7.1 Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text. L.7.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing; demonstrate proficiency within the 6-8 conventions continuum.
Writing Focus	Students will be introduced/re-introduced to the RACES constructed response writing structure. They will study an exemplar, looking for the characteristics that make it a strong response: thesis statement, text evidence that supports the thesis, and an analysis of how that evidence supports the thesis.
Materials	Constructed response bookmarks (1 per student) Exemplar constructed response (1 per student and 1 for teacher) Constructed response anchor chart 
Agenda:	<ul style="list-style-type: none"> • Warm-up (10 minutes) • Mentor Text Study (18 minutes) • Exit Ticket (2 minutes)

Lesson Plan			
Warm-up			
<input type="checkbox"/> Quick Write and Flash Edit Routine	<input checked="" type="checkbox"/> Grammar Routine		
Quick Write Prompt:	Grammar Concept: Run-on sentences		
Before Writing			
<input checked="" type="checkbox"/> Craft Study	<input type="checkbox"/> Prewriting	<input type="checkbox"/> Drafting and Revising	<input type="checkbox"/> Publishing
5 minutes	Intro Mentor Text	<p>Project exemplar constructed response. Pass out copies of the exemplar constructed response to each student.</p> <p>Say: Today, we are going to study constructed response writing. You have been practicing this type of writing since kindergarten, using the RACE model, and you added an S to the model last year to make RACES, which added a layer of complexity. Let's review a model RACES response and identify the characteristics that make it a strong constructed response.</p> <p>Read Exemplar Constructed Response through once.</p>	

Lesson 1: CR Writing

During Writing		
13 minutes	Read and Discuss	<p>Say: Label a clean page in your notebook “Constructed Response Structure – RACES.”</p> <p>Build an anchor chart using each step of the RACES process. Students will glue the RACES bookmark in their notebook to write notes around.</p> <p>Say: The RACES model creates a well-rounded paragraph. First, let’s review what you already know. R, for restate, and A, for answer, always flow together to create our thesis statement or topic sentence in a constructed response. It is important that we take the prompt given and restate it before giving our answer. Then, we get to C, for citing evidence. This is where we put evidence that directly supports our thesis statement. Next, we move to E, which is to explain how our evidence supports our thesis statement. Lastly, we finish with S, for significance. This is where we will make a connection between what we read and another text, ourselves, or the world.</p> <p>Volunteer: Where in this response do you see the RA thesis statement? Underline it and label it RA.</p> <ul style="list-style-type: none"> • Response: The RA thesis statement is the first sentence of the response, “The narrator’s mother passed away even though the reader is not directly told.” <ul style="list-style-type: none"> ○ Follow-up Prompt: What does RA mean? <p>Volunteer: Where in this response do you see the C? Underline it and label it C.</p> <ul style="list-style-type: none"> • Response: The C is the second sentence of the response, “On lines 12-13 of the text, it said, ‘Why were they the very last words she had ever said to me, forced out with her last breath?’ (Yolen).” <ul style="list-style-type: none"> ○ Follow-up Prompt: What does C mean? <p>Turn and Talk: Where in this response do you see the E and S? Work with your partner to find them and label them E or S.</p> <ul style="list-style-type: none"> • Response: The E is the third sentence, “This shows that the narrator is reflecting on her mother’s last words and last breath before her death.” The S is the last sentence, which is, “This is important because the narrator does not clearly say her mother passed away, but the reader understands that the narrator’s mother’s influence is very strong even after her death.” <ul style="list-style-type: none"> ○ Follow-up Prompts: What does E mean? What does S mean? <p>Turn and Talk: Explain how the evidence the writer provides supports the thesis statement.</p> <ul style="list-style-type: none"> • Response: The evidence the writer provides supports their thesis statement because it directly highlights a line from the short story where the words “last words” and “last breath” are used, indicating that the narrator’s mother is no longer living. <ul style="list-style-type: none"> ○ Follow-up Prompt: What is the thesis statement? <p>Turn and Talk: Explain how the explanation and significance show the thinking of the writer and strengthen their argument.</p>

Lesson 1: CR Writing

		<ul style="list-style-type: none"> • Response: The explanation strengthens the thinking of the writer because it shows how the evidence supports the thesis statement. The significance strengthens the writer's argument because it describes how the reader really does not need to be explicitly told the narrator's mother has passed away to see her importance and impact on the narrator and story. <ul style="list-style-type: none"> ○ Follow-up Prompt: What explanation did the writer give? What significance connection did they make?
After Writing		
2 minutes	Exit Ticket	How does following the RACES structure create a strong constructed response?

SAMPLE

Lesson 1: CR Writing

Exemplar Constructed Response

Prompt: Even though the reader is not directly told, what happened to the narrator's mother? Cite evidence to support your answer.

The narrator's mother passed away even though the reader is not directly told. On lines 12-13 of the text, it said, "Why were they the very last words she had ever said to me, forced out with her last breath?" (Yolen). This shows that the narrator is reflecting on her mother's last words and last breath before her death. This is important because the narrator does not clearly say her mother passed away, but the reader understands that the narrator's mother's influence is very strong even after her death.

SAMPLE





Constructed Responses are written responses to Reading Literature & Reading Informational texts. Students will read text and respond to a prompt. Constructed responses are valuable and should be a regular practice because they support student comprehension and critical thinking about text.

See Unit 1 Writing Scope & Sequence for pacing of the gradual release for constructed response writing.

Best Practice

Use the poster to help students create a personal anchor chart in their notebooks. The anchor chart teaches the process and will aid in the successful completion of constructed responses.

POSTER:

Constructed Response Writing	
R A	<p>Restate and Answer </p> <p>Restate and answer the prompt in one sentence</p>
C	<p>Cite </p> <p>Give evidence from the text</p> <ul style="list-style-type: none"> • In the text it said, "___" • The author wrote, "___" • An example in paragraph ___ is, "___" • According to the text, "___" • The text explicitly states, "___" • In paragraph ___ the author states, "___"
E	<p>Explain </p> <p>Explain how your evidence supports your answer</p> <ul style="list-style-type: none"> • This means ___ • This is an example of ___ • This shows that ___ • This is because ___ • This proves ___ • This demonstrates ___
S	<p>Significance </p> <p>Explain why the text matters</p> <ul style="list-style-type: none"> • This is important because ___ • This is similar to the text ___ because in both texts ___ • This is similar to the world because ___ • The significance of this is ___ • ___ says/does/thinks this because ___

Tips:

- Hang poster in a place where all students can see it
- Review and practice one part of RACES each day following the Scope and Sequence of Unit 1 Writing
- Put CR bookmark in student writing notebooks for reference
- Support students with tips on how to Restate by crossing off the question word(s) and writing it as a statement

Model

Teacher models writing constructed responses using the RACES method with each day's prompt. The modeling assists students in understanding the process & expectations for successful CR completion.

Tips:

- Teacher thinks aloud while modeling
- Teacher writes response using RACES poster & CR bookmark
- Students copy response on in writing notebook
- Students score one CR based on 2-point rubric

Shared Writing

Teacher facilitates a shared write of constructed responses using the RACES method with each day's prompt. Shared writing allows the teacher to guide student in successfully meeting expectations.

Tips:

- Teacher guides students through RACES method
- Teacher references RACES poster for sentence starters
- Teacher writes response in writing notebook for students to copy (everyone has same response)
- Students score one CR based on 2-point rubric

Independent Writing

Students independently write constructed responses.

Tips:

- Teacher reads CR prompt to class
- Teacher reminds students of expectations
- Students write in writing notebook
- Students write using RACES method
- Students score one CR based on 2-point rubric
- Teacher circulates to provide feedback


Scoring:

Constructed Response Rubric	
Score	Response Features
2 Points	<ul style="list-style-type: none"> Valid inferences and/or claims from the text where required by the prompt Evidence of analysis of the text where required by the prompt Reasoning and analysis of evidence chosen to support the prompt Relevant facts, definitions, concrete details, and/or other information from the text to develop response according to the requirements of the prompt Sufficient number of facts, definitions, concrete details, and/or other information from the text a required by the prompt Grammatical errors do not impact readability
1 Point	<ul style="list-style-type: none"> A mostly literal recounting of events or details from the text as required by the prompt Some relevant facts, definitions, concrete details, and/or other information from the text to develop response according to the requirements of the prompt Grammatical errors begin to impact readability or written in bullets
0 Point	<ul style="list-style-type: none"> A response that does not address any of the requirements of the prompt or is totally inaccurate A response that is not written in English A response that is unintelligible or indecipherable

**** If the prompt requires two texts and the student only references one text, the response can be scored no higher than a 1.**

Unit 1 Lesson 1: from “Birthday Box”



Lesson Preview – p. 1	
Objectives	I can cite evidence from the text to support my analysis of the text. I can demonstrate appropriate habits of discussion.
Standards	<p>RL.7.1 Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.</p> <p>SL.7.1 Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grade 7 topics, texts, and issues, building on others’ ideas and expressing their own clearly.</p> <p>SL.7.1a Come to discussions prepared, having read or researched material under study; explicitly draw on that preparation by referring to evidence on the topic, text, or issue to probe and reflect on ideas under discussion.</p> <p>L.7.6 Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases; gather vocabulary knowledge when considering a word or phrase important to comprehension or expression.</p>
In the Text	Today’s lesson focuses on citing evidence, which is a secondary skill for the entire school year. To practice this skill, students will read an excerpt of a short story by Jane Yolen titled “Birthday Box”.
Key Questions	Questions that should not be skipped: 1, 2, 4, 5
Possible Implicit Vocabulary	anniversaries (line 1) – dates that are remembered or celebrated because a special or notable event occurred on that date in a previous year
Homework Options	<ul style="list-style-type: none"> ○ Reread the section of text ○ Study Evidence Tracker ○ Questions from the lesson that were skipped
Agenda:	
<ul style="list-style-type: none"> • Introduce Unit (2 minutes) • Explicit Skill Instruction, Model, and Practice (16 minutes) • Introduce Text (1 minute) • Explicit Vocab Instruction (2 minutes) • Core Text (20 minutes) • Exit Ticket (4 minutes) 	

Lesson Plan		
Before Reading		
2 minutes	Unit Intro	<p>Say: Our first unit this year will focus on a series of short stories. All of the stories have one thing in common: they are about people who are forced into difficult circumstances. While we read, we will think about these two questions: How do I respond to a moral dilemma in my own life? How do authors craft their stories to develop the protagonist’s sense of self? Post an anchor chart with these questions to be referred to throughout the unit.</p> <p>There are a few characteristics that all short stories have in common:</p> <ul style="list-style-type: none"> • generally less than 20,000 words • focus on one incident (single plot) • single setting • limited number of characters

Lesson 1: from “Birthday Box”

		<ul style="list-style-type: none"> covers a short period of time develops a theme
16 minutes	Skill Intro, Model and Practice	<p>Skill Introduction – Citing Evidence</p> <p>What: Citing evidence is providing evidence from the text that proves your thinking. You have to evaluate the evidence and select the best piece(s) to support your thinking.</p> <p>How:</p> <ol style="list-style-type: none"> Turn to the section of the text that’s being discussed. Find details that led to your thoughts on the question. <ul style="list-style-type: none"> ✓ Cite your evidence directly by saying, “In the text, on page __, it says...” ✓ Paraphrase multiple pieces of evidence by saying, “According to the author...” When other readers share their evidence, be thinking, “Is that the best evidence to support the answer? Can I find a different/better piece of evidence?” <p>Why: Good readers cite the best evidence to prove their thinking is logical.</p> <p>Skill Model</p> <ul style="list-style-type: none"> Project the poem, “The Man in the Jar.” Say: I’m going to read a poem called “The Man in the Jar”. Then I’m going to answer a question using evidence from the poem. The question I’m going to answer is – Why does the man like to live in the jar? Read poem aloud. Think Aloud: Based on the poem I can see that is comfortable living in the jar. In the text it says, “My jar’s so cozy, warm and bright, even in the full moonlight.” So, to answer the question I would say, “The man likes to live in the jar because he is comfortable. In the text it says, “My jar’s so cozy, warm and bright, even in the full moonlight.” I know this is the best evidence because the rest of the poem shares reasons about why someone wouldn’t want to live in the jar. <p>Skill Practice</p> <ul style="list-style-type: none"> Keep the same poem projected. Reread if needed. Turn and Talk: How does the speaker in the poem feel about the man in the jar? <ul style="list-style-type: none"> Response: The speaker feels like it is unusual for a man to live in a jar. In the text the speaker says, “For a stranger sight you’d have to go far.” This leads me to believe that the speaker thinks it is strange for someone to live in a jar. Another piece of evidence to support the speaker’s perspective is that he feels so strongly about it that he asks the man, why he lived in a jar. Note: <i>Although this is a fairly simplistic example of citing evidence, make sure students’ answers are in fact grounded in the evidence and that they get used to asking is this the best evidence to use.</i> <p>Habits of Discussion Skill Intro and Practice</p>

Lesson 1: from "Birthday Box"

Say: During our discussion today, we are going to practice 3 habits of discussion that everyone needs when they are talking to others. This is going to require you to listen and think very carefully about what your classmates are saying.

- **Habit #1 Skill Intro:** Building off a peer's response
 - **Say:** The first habit we are going to practice is praising and building off a peer's response. When someone gives an answer, I want you to think about what they say, because comments are not in isolation. I'll ask more than one person to share. If you share after someone else, start your answer with "I like the way peer's name said something because...and I would add...or I can add onto that because..." and explain your reasoning.
- **Habit #1 Skill Practice:**
 - **Say:** Let's practice. I think that Batman is the best superhero because he does not actually have any superpowers. What do you think?
 - Have 2-3 students answer, prompting them to praise your answer and build off of the response.
 - Be prepared to say, "Build off that," "Tell me more about what _____ said," and/or "Can you tell me more about what _____ is thinking?"
- **Habit #2 Skill Intro:** Paraphrasing main points of a discussion
 - **Say:** Now, as we share, we are going to add an additional layer to our discussion. Our next habit of discussion is paraphrasing main points of a discussion or putting the discussion into your own words. During a discussion, I want you to think about what is being said so you can remember and paraphrase the main points.
- **Habit #2 Skill Practice:**
 - **Say:** For example, I said that Batman is the best superhero because he does not have superpowers, and student names added on. Who can paraphrase our entire discussion?
 - Call on 1 student to paraphrase the main points of the discussion.
 - **Say:** What did _____ just do?
- **Habit #3 Skill Intro:** No hands discussion
 - **Say:** The last habit we are going to practice is a "no hands discussion." Outside of school, people typically do not raise their hands to talk, so we need to practice waiting and understanding the appropriate time to prompt a peer in a conversation or add to a discussion.
- **Habit #3 Skill Practice:**
 - Sit with a table of students to create a fishbowl for other students to observe.
 - **Say:** Before we continue our superhero conversation, I may give you this non-verbal: [push back from where you are sitting or standing and offer your hands to the students to encourage them to continue the conversation]. This means I want you to continue the conversation without me calling on you or a no-hands discussion; however, be ready for my attention signal!

Lesson 1: from “Birthday Box”

		<ul style="list-style-type: none"> ○ Say: I think Batman is the best superhero because he does not actually have superpowers. <ul style="list-style-type: none"> ▪ While saying the above statement, pay close attention to the nonverbal cues of students at the table (e.g. head shaking, nodding, etc.) and be prepared to respond. ○ Say (response informed by student nonverbals): _____, I notice by the way you are shaking your head that you disagree, tell us why. ○ Student responds <ul style="list-style-type: none"> ▪ At this point, you can keep the conversation going if other students add to the conversation or utilize an attention signal and correct habit if students are talking over each other, not giving enough wait time, or other breakdowns. ○ Say: What did we just do?
1 minutes	Text Intro	Say: During today’s reading, we are going to read an excerpt from a short story called “Birthday Box” by Jane Yolen. As we read, I’ll ask you several questions that will require citing evidence.
2 minutes	Explicit Vocab	<p>subtle (line 26) – hard to notice or see; not obvious</p> <ul style="list-style-type: none"> • Subtle is an adjective often used to describe a difference or a motion that most would not notice like a subtle gesture to a friend or a subtle change in a person’s behavior. • The other team finally caught the subtle signal the coach was giving to her players. • Application: <ul style="list-style-type: none"> ✓ What would you do if you wanted to be subtle, but needed to tell your best friend he or she has something in his or her teeth? ✓ Choose a student to stand up, be subtle, and leave the room.
During Reading		
20 minutes	Read and Discuss	<p>Use a variety of reading strategies to move through the text. Drop in implicit vocabulary instruction as needed.</p> <p>Read entire text aloud once before stopping to ask questions.</p> <p>Say: Our first question is a turn and talk. Before talking to your partner, you’ll have 10 seconds to think about your answer to the question. Make sure you listen to your partner’s answer and praise and build off his or her response.</p> <p>Q1 p. 1 line 5 – Turn and Talk: At the beginning of the story, the narrator says she “felt empty and angry.” What evidence supports these feelings?</p> <ul style="list-style-type: none"> • Response: In the text, on lines 2-5, it says, “I stopped writing. I stopped reading except for school assignments. I was pretty mean to my half-brothers and totally rotten to my stepmother and Dad.” <ul style="list-style-type: none"> ○ Follow-up Prompt: What did she do (or stop doing), and how did she treat her family? <p>Q2 p. 1 line 13 – Cold Call: Even though the reader is not directly told, what happened to the narrator’s mother? Cite evidence to support your answer.</p>

Lesson 1: from "Birthday Box"

		<ul style="list-style-type: none"> • Response: Although we do not know how, we know that the narrator's mother passed away. In the text, in line 6, it says, "right after my first birthday without Mama." Later, the text says, "Why were they the very last words she had ever said to me, forced out with her last breath?" <ul style="list-style-type: none"> ○ Follow-up Prompt: Is the narrator's mother still alive? What in the text supports your answer? <p>Q3 p. 1 line 15 – Turn and Talk: What evidence supports that the narrator is haunted by her mother's death? Explain your answer.</p> <ul style="list-style-type: none"> • Response: In the text, on lines 14-15, it says, "The room was full of shadows, not all of them real." This means that the death of the narrator's mother hangs over her life similar to a shadow. <p style="margin-left: 40px;">Follow-up Prompt: What does "not all of them real" mean when talking about shadows?</p> <p>Say: Our next question is a write and discuss. I will give you 1-2 minutes to write your thoughts down on your discussion guide before we come back together as a class to share out. When we discuss as a class, be ready to paraphrase the main points of the discussion.</p> <p>Q4 pg. 1 line 27 – Write and Discuss: What evidence in these lines supports the idea that the narrator would no longer feel "empty" as described in line 4? Explain your evidence.</p> <ul style="list-style-type: none"> • Response: In the text, on lines 24-25, the narrator says, "But I had to fill up the box to make it all it could be. And I had to fill me up as well." This means that she needs to fill up the box, but also herself, not to feel empty anymore. <ul style="list-style-type: none"> ○ Follow-up Prompt: What does the author need to do to not feel empty anymore? <p>Say: Our last question is another turn and talk. After you talk with your partner, we will share as a whole group. Depending on the state of the discussion, I may use our nonverbal to encourage you to continue the conversation without me calling on you; remember to wait the appropriate time to prompt a peer in a conversation or discussion.</p> <p>Q5 pg. 1 line 29 – Turn and Talk: What evidence supports the idea that this event changed the narrator for good? Explain your evidence.</p> <ul style="list-style-type: none"> • Response: In the text, the author says the narrator began writing at that very moment and did not stop. This shows that the narrator was permanently changed because she has not stopped writing since this event. <ul style="list-style-type: none"> ○ Follow-up Prompt: What did the narrator start doing at the end of the story?
After Reading		
4 minutes	Exit Ticket	How do authors craft their stories to develop the protagonist's sense of self? You may use today's reading or stories you have previously read for evidence.

Lesson 1: from "Birthday Box"



The Man In The Jar

© Irwin Mercer

I once knew a man who lived in a jar.
For a stranger sight you'd have to go far.
I asked him once why he lived in a jar.
He grimaced and said, how bizarre you are.

My jar's so cozy, warm and bright,
Even in the full moonlight.
The only drawback is, you see,
Getting out quickly when I have to pee.

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Sample Math Lesson Plans

Kindergarten – Unit 1 Plan

Math Stories: Manipulatives & Counting

In Unit 1 of *Math Stories*, students explore various manipulatives that will be available throughout the year when working with math stories. Students also develop and refine the counting principles of sequence, one-to-one correspondence, and cardinality through both open (Grab & Count) and directed (Counting Jar) counting experiences.

Bridges in Mathematics: Numbers to Five & Ten

In Unit 1 of *Bridges in Mathematics*, students focus on the counting sequence to 20 and quantities to 10. They also spend a good deal of time establishing classroom routines that will provide structure for math class all year long, include Think-Pair-Share and Work Places.

	Day 1	Day 2	Day 3	Day 4	Day 5
Math Story 25 minutes	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives
Problems & Investigations 20 – 30 minutes	Module 1: Sorting Shoes Session 1: One Shoe	Module 1: Sorting Shoes Session 2: Two Shoes	Module 1: Sorting Shoes Session 3: Five Shoes	Module 1: Sorting Shoes Session 4: Ten Shoes	Module 1: Sorting Shoes Session 5: All Shoes
Work Places 15 – 30 minutes <i>*introduced</i>	*1A: Unifix Cubes *1B: Pattern Blocks *1C: Polydrons	1A, 1B, 1C, *1D: Geoboards & Geobands	1A, 1B, 1C, 1D, *1E: Pennies & Mats	1A, 1B, 1C, 1D, 1E	1A, 1B, 1C, 1D, 1E
Home Connection	n/a	n/a	n/a	n/a	n/a
	Day 6	Day 7	Day 8	Day 9	Day 10
Math Story 25 minutes	Grab & Count	Grab & Count	Grab & Count	Grab & Count	Grab & Count
Problems & Investigations 20 – 30 minutes	Module 2: Friendly Fives Session 1: Shoes to Toes	Module 2: Friendly Fives Session 2: Fabulous Fives	Module 2: Friendly Fives Session 3: Fives with Fingers	Module 2: Friendly Fives Session 4: Numerals 1 to 5	Module 2: Friendly Fives Session 5: Filling Five-Frames
Work Places 15 – 30 minutes <i>*introduced</i>	1A, 1B, 1C, 1D, 1E	1A, 1B, 1C, 1D, 1E	1A, 1B, 1C, 1D, 1E	*1F: Spill Five Beans	1A, 1B, 1C, 1D, 1E, 1F <i>Elements of Early Number Sense</i> <i>Checkpoint Assessment</i>
Home Connection	n/a	Butterflies & Dots (HC p. 1-2)	n/a	n/a	Count & Match (HC p. 3-4)

	Day 11	Day 12	Day 13	Day 14	Day 15
Math Story 25 minutes	Grab & Count	Grab & Count	Grab & Count	Grab & Count	Grab & Count
Problems & Investigations 20 – 30 minutes	Module 3: Friendly Tens Session 1: Terrific Tens	Module 3: Friendly Tens Session 2: How Many Dots? Part 1	Module 3: Friendly Tens Session 3: How Many Dots? Part 2	Module 3: Friendly Tens Session 4: Beat You to Five	Module 3: Friendly Tens Session 5: Introducing Work Place 1G Beat You to Five
Work Places 15 – 30 minutes <i>*introduced</i>	1A, 1B, 1C, 1D, 1E, 1F	1A, 1B, 1C, 1D, 1E, 1F	1A, 1B, 1C, 1D, 1E, 1F	1A, 1B, 1C, 1D, 1E, 1F	1B, 1C, 1D, 1E, 1F, 1G Beat You to Five Checkpoint Assessment
Home Connection	n/a	n/a	More Count & Match (HC p. 5-6)	n/a	n/a

	Day 16	Day 17	Day 18	Day 19	Day 20
Math Story 25 minutes	Counting Jar	Counting Jar	Counting Jar	Counting Jar	Counting Jar
Problems & Investigations 20 – 30 minutes	Module 3: Friendly Tens Session 6: Introducing Work Place 1H Which Numeral Will Win?	Module 4: Using Structure & Patterns Session 1: Folktales Patterns	Module 4: Using Structure & Patterns Session 2: Clap, Tap & Snap Patterns	Module 4: Using Structure & Patterns Session 3: Unifix Cubes Patterns, Day 1	Module 4: Using Structure & Patterns Session 3: Unifix Cubes Patterns, Day 2
Work Places 15 – 30 minutes <i>*introduced</i>	1C, 1D, 1E, 1F, 1G, 1H	1C, 1D, 1E, 1F, 1G, 1H	1C, 1D, 1E, 1F, 1G, 1H	1C, 1D, 1E, 1F, 1G, 1H	1D, 1E, 1F, 1G, 1H, *1I: Unifix Cubes Patterns
Home Connection	Shapes & Numbers (HC p. 7)	n/a	Bug Patterns (HC p. 9-12)	n/a	Salt Box Numerals (HC p. 13-16)

Unit 1: Introducing Counting

Week 1: Exploring Manipulatives



WHAT?

introduce students to math manipulatives they will be using for more structured math activities throughout the year.

Standard for Mathematical Practice 5 Use appropriate tools strategically.

WHY?

- When encountering new manipulatives, students need time to explore and play in order to construct ideas of their features. It is very common to see students dive into these materials without any guidance, and to see mathematical thinking and vocabulary naturally emerge.
- This exploration time is also a critical time for the classroom teacher to be able to set expectations for manipulatives use, prior to bringing them into a more structured task. It is important to explicitly teach boundaries for manipulatives (e.g., not throwing, keeping them in a specified space) and procedures, such as passing out and cleaning up.
- The discussion of exploring manipulatives is an opportunity for students to gain practice explaining their work and ideas as well as an opportunity for the teacher to establish norms and procedures for what a class math discussion should look and sound like.

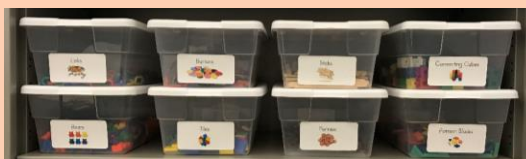


HOW?

- Almost anything can be used as a math manipulative. There should be a variety of at least 8-10 different manipulatives readily accessible to students. The following list includes both materials that can be purchased from educational companies or recycled/repurposed from other materials.



Two-colored counters	Beans
Buttons	Pasta
Connecting cubes	Beads
1-inch tiles	Clothespins
Pennies	Popsicle sticks
Plastic bears, insects, fruit, etc.	Toothpicks
Plastic links	Bottle caps
Pattern blocks	Marshmallows
Small snack crackers	Baby food pouch caps
Cotton balls	Craft pom-poms
Small hair clips	Large paper clips
Googly eyes	Bingo chips
Nuts and bolts	Packing peanuts



Exploring Manipulatives Structure

Preparation

1. Determine which manipulatives will be used each day.
Suggestion: Have one bin of manipulatives per small group each day.
2. Determine how manipulatives will be distributed.
Examples:
 - Have bins (with lids) on tables prior to beginning with Exploring Manipulatives.
 - Designate one student from each table to get a bin from a central storage location.
3. Determine how student movement will be structured during exploration.
Examples:
 - One bin of manipulatives at each table/group and students stay at table.
 - Manipulatives set up at stations and students are able to move freely. It may be helpful to provide a limit on how many students may be at a station.

Engage

This portion must be done at least the first day. It can be done daily to open the activity.

 **2-3 minutes**

1

Show either the collection of manipulatives, or a projected image of the manipulatives, the class will be working with (see example below).



Look at these groups of objects [or pictures]. I want you to take 15 seconds to think about what you notice and what you wonder.

2

Use a **Think-Pair-Share** structure (see *Best Practices*) to have students share:



Share with your partner what you notice and wonder about the picture.

3

Use an attention signal to bring students back to the whole group. Have 4-5 students share out. Accept any and all responses, this will validate student thinking.



Best Practices

- It is suggested that students be seated in a carpet area for this part of the routine. This will create an engaging and comfortable setting for students to discuss ideas.
- Preplan a structure for the **Think-Pair-Share** and be very explicit with the directions.
Example: (After giving think time...)



Turn to your partner to share what you noticed. The partner who [has the most letters in their name] will go first. You will have [20 seconds] to share, I will tell you when to switch. Go!

Introducing the Activity

10-12 minutes

1



[On Day 1]

We are going to use lots of different math tools to help solve math problems and play math games. These math tools are called manipulatives. You are going to have some time to explore many different manipulatives this week.

[Each day]



When you go back to your table/desks, you are going to spend some time exploring your manipulative for today. I want you to see what you can do with them.

2

[On Day 1]

Set very clear expectations regarding appropriate student behavior for interacting with manipulatives and create an anchor chart that can be referenced the rest of the year.



Remember I told you that these are math tools, which means that they are important and we want to take good care of them. Take 15 seconds and think about what are some things we should remember when we are using our tools for math.

A Think-Pair-Share structure can be used before having students share out .
Note: This portion may take longer on Day 1 than other days during Exploring Manipulatives.

[Each day]



You will have about 5-7 minutes when you get back to your seat to explore the manipulative that is at your table today. As you work, remember our expectations.
[Review the anchor chart created on Day 1]

3

Set a time for 5-7 minutes. Circulate and observe students as they work. Keep questioning open-ended to get a sense of how children naturally try to interact with the manipulative.
Example: What have you found you are able to do with your connecting cubes?

Identify 3-4 students who are working with different manipulatives that you will have share in the discussion.

Discussion **5-7 minutes****1**

Use an attention signal to bring students back to the whole group. Ask the 3-4 pre-determined students to share their manipulative and what they found they were able to do with it.

As each student shares, the teacher should restate his/her reasoning to affirm the student's thought process.

**Best Practices**

- Use the first few discussions to establish norms and procedures for what a class math discussion should look and sound like. Creating an anchor chart with these norms is recommended.
- It ***strongly recommended*** to have students who are sharing bring their manipulatives underneath the document camera. A tray or piece of cardstock can help with transferring objects from student's seat to the document camera.
- It is suggested that students be seated in a carpet area for this part of the routine. This will create an engaging and comfortable setting for students to discuss ideas.
- Ask another student to restate what was shared in his/her own words.
- Have students who used the same manipulative or were able to do something similar with theirs show a thumb up or use the sign language for "same" (see *video link below*).
<https://www.youtube.com/watch?v=AFjijfTpc>

Key Points **2-3 minutes****1**

The teacher will make a connection from the students reasoning to applicable mathematical ideas.



Examples: ***"I noticed you were able to use the connecting cubes to measure how long your pencil was."*** or ***"I noticed you sorted the pasta pieces by color."***

2

Wrap-up the routine by articulating what students did today and how it connects to mathematics.



Example: ***"Scholars, today you explored manipulatives and found you were able to do a lot of different things with them. Good mathematicians use different tools, like these, to help them solve problems!"***

Number Corner Update Routine

Kindergarten: September

September Calendar Grid

 **3 minutes**

1. Sing or Recite the Days of the Week

Bring students to Calendar Grid area and direct students to calendar grid.



We are going to sing a song to help us learn and remember the names of the days of the week. Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and then we start again.

Sing the song twice as you or a student helper points to the Day Cards as you sing.

After the song, the teacher or student helper points to the empty pocket for the day, and the students choral respond with today's name.

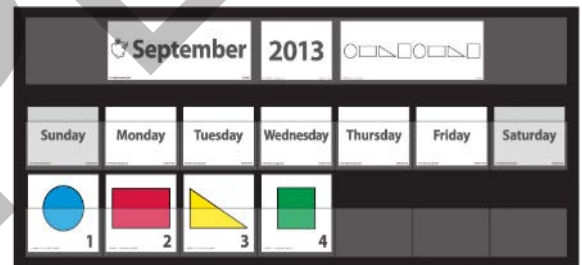


*Today is **Wednesday!** Let's say the whole date together, today is **Wednesday, September 2, 2020.***

2. Make a Prediction



Look at our calendar for this month. I want you to take 15 seconds to make a prediction about the shape and number that might be on our next calendar marker. What do you think will be on our calendar marker today?



3. Share Predictions

Use a **Think-Pair-Share** structure (see *Best Practices*) to have students share:



Share with your partner your predictions for today.

4. Share out Predictions

Use an attention signal to bring students back to the whole group. Have 4-5 students share out their predictions. Accept any and all responses, as this will validate student thinking.

5. Update Calendar Grid



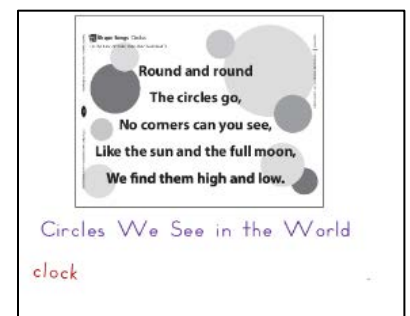
Now it is time to update our Calendar Grid.



Have the student helper reveal the calendar card for the day and point out the matching Shape Poster. Have students check that the shape matches the description on the Shape Poster. Have the student helper report what the object is or ask the class using a choral response.



I will record the name of the object on our Shapes Poster.



Optional**6. Key Questions**

If there is time, ask one of the following key questions to extend student thinking. These can be repeated.



- What shape do you see on the marker we posted yesterday?
- How do you know it's a circle (rectangle, triangle, square)?
- If I take the marker out of its pocket and turn it upside down, is the shape on the marker still a circle (rectangle, triangle, square)? How do you know?
- How do you know the shape on this marker is not a circle (rectangle, triangle, square)? What shape will you see on today's marker? How do you know?
- Can you tell what color the shape will be? Why or why not?
- Will you see a circle (rectangle, triangle, square) or something shaped like a circle (rectangle, triangle, square)? How do you know?
- Everyone agrees that we'll see something that is shaped like a circle (rectangle, triangle, square) on today's marker. What might that object be? Can you think of anything shaped like a circle? Can you see anything in our classroom shaped like a circle (rectangle, triangle, square)?

7. Share Answers

Use a **Think-Pair-Share** structure (see *Best Practices*) to have students share:



Share your answer with your partner.

8. Share out Answers

Use an attention signal to bring students back to the whole group. Have 2-3 students share out their answers. Accept any and all responses, as this will validate student thinking.

September Calendar Collector



3 minutes

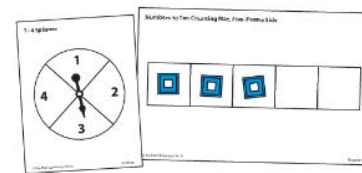
1. Student Helper Spins the 1-4 Spinner

When the spinner arrow lands, ask the student helper to count out that many cubes.



How many cubes will we add to our collection?

Student Helper: We will add 3 cubes to our collection. 1, 2, 3.



2. Identify the Total Number of Cubes on the Five-Frame

The teacher or student helper will place the counted-out cubes onto the five-frame.

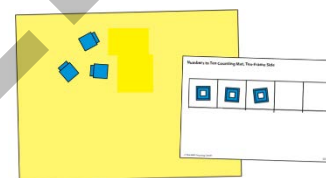


How many cubes do we have?

3. Pour the Cubes onto Construction Paper



I am going to dump the cubes from the mat onto this piece of paper. Will there still be the same number of cubes?



4. Recount the Cubes Together



Let's point to each cube and count again together to see if we still have the same amount. "1, 2, 3"

5. Snap the Cubes Together (into a short train)



I am going to snap the cubes together now. Do you think the number of cubes we have will be the same or different now?

Give students a few moments to consider this question and then recount the cubes by ones.



Let's recount our cubes and see if we still have the same amount. 1, 2, 3. Wow, it's still 3 cubes.

These brief exercises are intended to help students develop cardinality and conservation of quantity—the understanding that the last number stated when counting a set represents the total quantity, and the understanding that the quantity does not change, regardless of how the objects are arranged. Repeat this exercise during updates if you have time. Other ways to arrange the cubes include spreading them far apart on the construction paper, putting a cube on each of your fingertips, or counting them on the mat from right to left rather than left to right.

6. Update the Weekly Pocket Collection Chart

Teacher or student helper places cubes in the correct pocket for the collection.



Optional**7. Key Questions**

If there is time, ask one of the following key questions to extend student thinking. These can be repeated.



- Let's take all the cubes out of the pocket chart for this week and set them on this tray where everyone can see them clearly. Do you think we have enough to fill all the boxes on two ten-frame mats?
- Let's count the cubes together as we set them onto the ten-frame side of one of our counting mats.
- Do you think we'll need more than one counting mat? Why?
- How many cubes are there on the mat when it's full?
- Let's count on from 10 to find the total.
- Now let's go back and count the collection by 1's. Will we get the same total? How do you know?

8. Share Answers

Use a **Think-Pair-Share** structure (see *Best Practices*) to have students share:



Share your answer with your partner.

9. Share out Answers

Use an attention signal to bring students back to the whole group. Have 2-3 students share out their answers. Accept any and all responses, as this will validate student thinking.

September Days in School



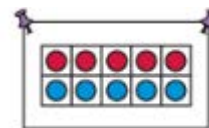
2 minutes

1. Add a Dot to the Ten-Frame



Now it is time to update our Days in School Chart. Look at our ten-frame here. Show me or Tell me how many dots there will be after we add the dot for today?

Students: Show four fingers or say, "eleven!"



Student helper adds a new dot to the ten-frame and leads the class in counting them.



1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11.

2. Add a Link to the Chain



How many links will there be after we add today's link?

Students: Eleven.

Student helper adds a new link to the chain and leads the class in counting them. Eventually, students will count starting from 10.



1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11.



3. Identify Days in School

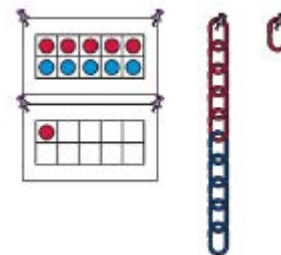


Now it is time to count the total number of days we have been in school! We will count all the dots to determine the total days we have been in school. Let's count all together!

Use your pointer to circle each of the full frames as you count the dots on each by ones (eventually you will count by 10s). Then point to the dot(s) on the new frame and continue to count by ones.



"1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11!"



Eventually, students will count starting from 10.

On Day 11, the class starts a new frame of dots and a new chain of links and adds another sentence strip to the class number line. Updates continue as described above. Student count the dots on both frames and the links on both chains, first by 1's, then by counting on from the set of ten (10...11, 12, 13, and so on) and finally by 1's again to reconfirm the day's total.

4. Update the Class Number Line

Teacher or student helper points and leads the class in counting and reading each number written on the number line.

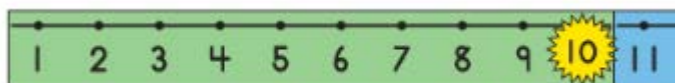


How many days have we been in school?

Eleven!

Now, I will write 11 on our number line to show that we have been in school for 11 days.

Teacher or Student Helper writes the new number on the number line.



Optional**5. Key Questions**

If there is time, ask one of the following key questions to extend student thinking. These can be repeated.



- How many dots did we have on the ten-frame yesterday? Can you show with your fingers? How did you count the dots?
- How many dots will we have on the ten-frame after we add the dot for today? How do you know?
- How many more dots do we need to add to the ten-frame to complete the first row of 5? How many more to fill every box on the frame to 10? How do you know?
- How many links did we have in our chain yesterday? Can you show with your fingers? Let's count to check.
- How many links will we have in the chain after we add 1 for today? How do you know?
- How many more links do we need to add to our chain to make a group of 5? How many more to make a group of 10? How do you know?
- What number do we need to write on our class number line today?

6. Share Answers

Use a **Think-Pair-Share** structure (see *Best Practices*) to have students share:



Share your answer with your partner.

7. Share out Answers

Use an attention signal to bring students back to the whole group. Have 2-3 students share out their answers. Accept any and all responses, as this will validate student thinking.

Best Practices

- It is suggested that students are seated in a carpet area for this part of number corner. This will create an engaging and comfortable setting for students to observe the calendar grid and discuss predictions.
- Preplan a structure for the Think-Pair-Share and be very explicit with the directions.
Example: (After giving think time...)



Turn to your partner to share what you noticed. The partner who [has the most letters in their name] will go first. You will have [20 seconds] to share, I will tell you when to switch. Go!

3rd GRADE MATH STORIES

Addition & Subtraction

SAMPLE

Double-Digit Addition within 100

SAMPLE

Double-Digit Addition within 100

Put Together/Add to Result Unknown

WHAT?



Students work with problems that involve adding a two 2-digit numbers with and without having to regroup and create a new ten.

NC2.OA.1 Represent and solve addition and subtraction word problems, within 100, with unknowns in all positions, by using representations and equations with a symbol for the unknown number to represent the problem.

NC2.NBT.5 Demonstrate fluency with addition and subtraction, within 100.

NC3.NBT.2 Fluently add and subtract within 1000 using strategies and algorithms based on place value, properties of operations, and/or the relationships between addition and subtraction.

WHY?



- Students will review with these problem types, as there was a strong focus on them in second grade. Students begin working with these familiar problems so the focus can be on student strategies for adding multi-digit numbers.
- These lessons allow students the opportunity to build and model 2-digit addition problems and develop their own invented strategies. ***It is important to note that students are NOT expected to master the standard algorithm in 2nd or 3rd grade (e.g., vertical alignment with carrying/borrowing to regroup). Mastery of the standard algorithm for addition and subtraction does not appear within state standards until the END of the 4th grade year.***

HOW?



- Base-ten materials should be utilized as a model that students can choose to use. The connecting cubes should still be provided, and students given the choice of materials to use. *Note: Even if students move towards modeling with base ten materials, they may still choose to count by ones. It is important to pay attention to HOW students count to see whether they are using the idea of ten as a unit or still counting by ones.*
- Modeling of student strategies to build understanding is strongly recommended by using an **open number line** and writing equations horizontally. The open number line is a tool that provides students with a visual model for adding and this model builds understanding and skills.

Double-Digit Addition within 100

Strategies

SAMPLE

Double-Digit Addition within 100

Put Together/Add to Result Unknown

Direct Modeling
with Ones

Direct Modeling
with Tens

Invented
Algorithms

STRATEGIES



1. Count by ones/Counting on

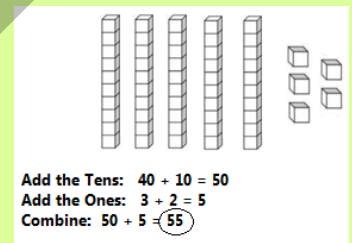
Student models cubes connected in groups of tens and ones, but counts each cube individually, or counts by ones when counting on.

2. Count by tens and ones

Using connecting cubes to count by tens and ones [10, 20, 30, 40, 50, 51, 52, 53, 54, 55]

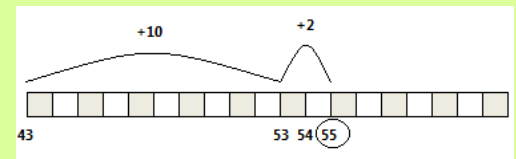
3. Adding by Place Value [Decomposition or Splitting Strategy]

Using connecting cubes or drawing to group the tens together and ones together. Add the tens, add the ones, then finally combines the two amounts. Students may also break the numbers apart into place value components (decompose the numbers) without using the concrete model or picture.



4. Adding up in Chunks [Friendly or Landmark Numbers]:

Students may add on to 43 by breaking apart the 12 into chunks. Students can make a jump of 10 and then a jump of 2.



BIG IDEAS



Students who can count and make sense of a problem will be able to solve. Allowing time for visualization and retelling of the problem's context is key to supporting student sense making.

When given the opportunity to build and model 2-digit addition problems, students can create their own invented solving strategies.

Students are NOT expected to master the standard algorithm in 2nd or 3rd grade. Mastery of the standard algorithm for addition and subtraction does not appear within state standards until the END of the 4th grade year.

Double-Digit Addition within 100

Topic at a Glance

Math Stories Topic at a Glance

Double-Digit Addition within 100



NC2.OA.1 Represent and solve addition and subtraction word problems, within 100, with unknowns in all positions, by using representations and equations with a symbol for the unknown number to represent the problem.

NC2.NBT.5 Demonstrate fluency with addition and subtraction, within 100.


NC3.NBT.2 Fluently add and subtract within 1000 using strategies and algorithms based on place value, properties of operations, and/or the relationships between addition and subtraction.

I can make sense of word problems and use efficient strategies to solve.		
Big Idea 1: Students visualize and make sense of the math story prior to solving. Big Idea 2: Students can use direct modeling with ones, direct modeling with tens, or invented algorithms to solve problems.		
30 min.	Math Story	Key Ideas & Student Look Fors
A1	How Many Cows? There are many different types of animals that live on a farm. There were 43 cows in the pasture and 12 cows in the barn. How many cows were on the farm?	<ul style="list-style-type: none"> Look for how students solved. Did they use count by tens and ones? Add by place value (40+10, 3+2; 50+5)? Add up in chunks (43+10; 53+2)? Compare/contrast two different strategies. Represent student strategies on an open number line.
A2	How Many Bugs? Chickens like to eat bugs. One day a chicken ate 52 bugs. The next day the chicken ate 23 more bugs. How many bugs did the chicken eat?	<ul style="list-style-type: none"> Look for how students solved. Did they use count by tens and ones? Add by place value (50+20, 2+3; 70+5)? Add up in chunks (52+20; 72+3)? Compare/contrast two different strategies. Represent student strategies on an open number line.
A3	How Many Ants? There were 29 little red ants that lived in the ant hole on the farm. Then 31 more ants came to live in the ant hole. How many ants live in the ant hole?	<ul style="list-style-type: none"> Look for how students solved. Did they use count by tens and ones? Add by place value (20+30, 9+5; 50+14)? Add up in chunks (29+1; 30+30; 60+4)? Compare/contrast two different strategies. Represent student strategies on an open number line.
A4	How Many Mice? The cat loves to chase mice on the farm. The cat chased 58 mice in the morning, and then chased 15 mice in the evening. How many mice did the cat chase that day?	<ul style="list-style-type: none"> Look for how students solved. Did they use count by tens and ones? Add by place value (50+10, 6+7; 60+13)? Add up in chunks (56+4; 60+10; 70+3)? Compare/contrast two different strategies. Represent student strategies on an open number line.
A5	How Many Apples? The farm also has many fruit trees. One day, the farmer picked 45 apples from one apple tree, and 16 apples from another tree. How many apples did he pick?	<ul style="list-style-type: none"> Look for how students solved. Did they use count by tens and ones? Add by place value (40+10, 7+8; 50+15)? Add up in chunks (47+3; 50+10; 60+5)? Compare/contrast two different strategies. Represent student strategies on an open number line.

Double-Digit Addition within 100

Math Stories

SAMPLE

Math Story A1		 30 minutes
<p>How Many Cows?</p> <p>There are many different types of animals that live on a farm. There were 43 cows in the pasture and 12 cows in the barn. How many cows live on the farm?</p>		
Engage [5 min]	<ol style="list-style-type: none"> 1. Show Engage image for MS 1. [See NHA provided PPT] 2. Pose Turn and Talk: What do you notice? What do you wonder? 3. Call on multiple students to share. [Option to record responses] 	
Problem [10-12 min]	<i>Visualize</i>	<p>A. Ask students to close their eyes or to look at the picture from the Engage and visualize what is happening while you tell the context of the math story.</p> <p><i>There are many different types of animals that live on a farm. There were 43 cows in the pasture and 12 cows in the barn.</i></p>
	<i>Retell</i>	<p>B. <i>Think</i> – Have students think about what they heard in the story. <i>What did you hear first? What did you hear next?</i></p> <p><i>Pair</i> – <i>Retell the story to your partner.</i></p> <p><i>Share</i> – Call on one or two students to retell the story, using the questions: <i>What did you hear first? What did you hear next?</i></p>
	<i>Re-read</i>	<p>C. Read the problem again with the question:</p> <p><i>Now I'm going to read the story again, but this time I have a question I want you to think about. There are many different types of animals that live on a farm. There were 43 cows in the pasture and 12 cows in the barn. <u>How many cows live on the farm?</u></i></p>
	<i>Make Sense</i>	<p>D. Pose a Think, Pair, Share question to allow students to estimate and/or explore reasonable solutions.</p> <p><i>Are there more than 50 or less than 50 cows on the farm? How do you know?</i></p>
	<i>Solve</i>	<p>E. Ask students to model the problem using cubes, pictures, and/or numbers and document the strategy they chose on their recording sheet.</p>

	<p>F. Now that you have a visual image of what is happening in today's story, I want you to work on this problem using whatever strategy or tools you need to help you solve. While you're working, remember to:</p> <ol style="list-style-type: none"> 1. Solve the problem using cubes, a picture, or numbers. 2. After you have solved the problem, try to come up with another way to solve. 3. Be able to explain how you solved.
Circulate & Ask Question	<p>G. Circulate, listen, and observe student thinking. Then ask probing questions to elicit student thinking, determine strategy, and connect students back to the context of the math story.</p> <p>Start with eliciting student thinking:</p> <ul style="list-style-type: none"> ○ Tell me about: <ul style="list-style-type: none"> ○ your picture ○ what you did with your math tools ○ what your numbers mean <p>Use additional questions to extend student thinking as appropriate (examples):</p> <ul style="list-style-type: none"> ● What does your equation/numbers mean? ● How could you show that with a picture? ● How could you label your picture to make it clear? ● Could you show me what you mean with manipulatives? ● How could you represent that with an equation/with numbers? <p><i>For students who have difficulty getting started, take them back to the context of the story using the following questions to prompt: What did you hear first in the story? Next? How could you show that with your math tools (or with a picture)?</i></p>
Choose	<p>H. <i>While circulating</i>, identify 2-3 students to share strategies in the order of least efficient to most efficient. Look for students who:</p> <ul style="list-style-type: none"> ○ counted by tens and ones ○ used place value ○ added in chunks

- A. Record student strategies on an anchor chart or a whiteboard to capture student thinking and to refer to in discussion.

$43 + 12$
How many cows were on the farm?

Strategy #1: Count by tens and ones

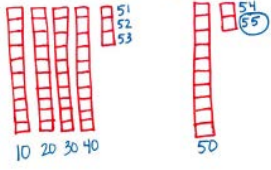

Strategy #2: Add by Place Value


Add the tens $40 + 10 = 50$
 Add the ones $3 + 2 = 5$
 Combine $50 + 5 = 55$

Strategy #3: Add in Chunks

Discussion
[7-8 min]

- B. Turn and Talk Question: Say, “[Insert student’s name] used a strategy where [he/she] added by place value (point to second strategy). Do you think we can find [his/her] numbers in the picture of the base ten blocks in strategy #1? Turn to your partner and tell them where you see $40 + 10$ and $3 + 2$ in the picture in strategy #1.”

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Key Points [2-4 min]</p>	<p>A. I noticed there were different ways to solve our math story.</p> <p>Strategy #1 Some of us counted by tens and ones. [Teacher points to the base ten blocks on chart and count 10, 20, 30, 40, 50, 51, 52, 53, 54, 55]</p> <p>Strategy #2 Some of us added by place value. [Teacher points to the equations on chart and shows adding the tens, $40 + 10$, to get 50. Then, adding the ones, $3 + 2$, to get 5. Finally, combining those sums together, $50 + 5$, to equal 55.]</p> <p>Strategy #3 And some of us started with 43 and added up in chunks using friendly numbers. [Teacher points to number line on chart to show beginning at 43, making a friendly jump of 10 to get to 53, and then a jump of 2 more to get to 55.]</p> <p>Turn and Talk: Turn and tell your partner where you see our problem, $43 + 12$, on the number line in strategy #3. Where is the 43? Where is the 12? Where is our sum?</p> <p>Today, we showed three different ways we can solve the problem using efficient strategies. In your Practice Problem, I want you to use one of these strategies that makes the most sense to you. [As you circulate, look for students who are still counting by ones and nudge them towards trying strategy #1 – counting by tens and ones.]</p> <div data-bbox="927 184 1490 919" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;">$43 + 12$ How many cows were on the farm?</p> <p>Strategy #1: Count by tens and ones</p>  <p>Strategy #2: Add by Place Value</p> <p>Add the tens $40 + 10 = 50$ Add the ones $3 + 2 = 5$ Combine $50 + 5 = 55$</p> <p>Strategy #3: Add in Chunks</p>  </div>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Practice Problem [5-7 min]</p>	<p>Students will now solve one practice problem on their own.</p> <p>The farmer had 46 goats on his farm. One day, he bought 23 more goats for his farm. How many goats does he have now?</p>

Math Story A2		 30 minutes
How Many Bugs? Chickens like to eat bugs. One day a chicken ate 52 bugs. The next day the chicken ate 23 more bugs. How many bugs did the chicken eat?		
Engage [5 min]	<ol style="list-style-type: none"> 1. Show Engage image for math story 2. [See NHA provided PPT] 2. Pose a Turn and Talk: What do you notice? What do you wonder? 3. Call on multiple students to share. [Option to record responses] 	
Problem [10-12 min]	Visualize	<p>A. Ask students to close their eyes or to look at the picture from the Engage and visualize what is happening while you tell the context of the math story.</p> <p>Chickens like to eat bugs. One day a chicken ate 52 bugs. The next day the chicken ate 23 more bugs.</p>
	Retell	<p>B. <i>Think</i> – Have students think about what they heard in the story.</p> <p>What did you hear first? What did you hear next?</p> <p><i>Pair</i> – Retell the story to your partner.</p> <p><i>Share</i> – Call on one or two students to retell the story, using the questions: What did you hear first? What did you hear next?</p>
	Re-read	<p>C. Read the problem again with the question:</p> <p>Now I'm going to read the story again, but this time I have a question I want you to think about. Chickens like to eat bugs. One day a chicken ate 52 bugs. The next day the chicken ate 23 more bugs. <u>How many bugs did the chicken eat?</u></p>
	Make Sense	<p>D. Pose a Think, Pair, Share question to allow students to estimate and/or explore reasonable solutions.</p> <p>Did the chicken eat more than 70 or less than 70 bugs? How do you know?</p>
	Solve	<p>E. Ask students to model the problem using cubes, pictures, and/or numbers and to document the strategy they chose on their recording sheet.</p>

	<p>F. Now that you have a visual image of what is happening in today's story, I want you to work on this problem using whatever strategy or tools you need to help you solve. While you're working, remember to:</p> <ol style="list-style-type: none"> 1. Solve the problem using cubes, a picture, or numbers 2. After you have solved the problem, try to come up with another way to solve. 3. Be able to explain how you solved.
Circulate & Ask Question	<p>G: Circulate, listen, and observe student thinking. Then ask probing questions to elicit student thinking, determine strategy, and connect students back to the context of the math story.</p> <p>Start with eliciting student thinking:</p> <ul style="list-style-type: none"> • Tell me about: <ul style="list-style-type: none"> ○ your picture ○ what you did with your math tools ○ what your numbers mean <p>Use additional questions to extend student thinking as appropriate (examples):</p> <ul style="list-style-type: none"> • What does your equation/numbers mean? • How could you show that with a picture? • How could you label your picture to make it clear? • Could you show me what you mean with manipulatives? • How could you represent that with an equation/with numbers? <p><i>For students who have difficulty getting started, take them back to the context of the story using the following questions to prompt: What did you hear first in the story? Next? How could you show that with your math tools (or with a picture)?</i></p>
Choose	<p>H: While circulating, identify 2-3 students to share strategies in the order of least efficient to most efficient. Look for students who:</p> <ul style="list-style-type: none"> ○ counted by tens and ones ○ used place value ○ added in chunks

Discussion
[7-8 min]

- A. Record student strategies on an anchor chart or a whiteboard to capture student thinking and to refer to in discussion.

52 + 23
How many bugs did the chicken eat?

Strategy #1: Count by tens and ones

Strategy #2: Add by place value

Add the tens $50 + 20 = 70$
 Add the ones $2 + 3 = 5$
 Combine $70 + 5 = 75$

Strategy #3: Add in chunks
(by a friendly number)

Note: Students may add in chunks in various ways. Strategy 3 is one example of how students may chunk 23 into friendly jumps. For example, some students may make 4 jumps of 5 and then one jump of 3. Another example might be that some students make their first jump to a friendly number – like a jump of 3 to get to 55 – then make 2 jumps of 10. You may want to wait to share this type of strategy until tomorrow’s math story.

- B. Turn and Talk question: Say, “[Insert student’s name] used a strategy where [he/she] added by place value (point to second strategy). Do you think we can find [his/her] numbers in the picture of the base ten blocks in strategy #1? Turn to your partner and tell them where you see $50 + 20$ and $2 + 3$ in the picture in strategy #1.”

Key Points
[2-4 min]

A. I noticed there were different ways to solve our math story.

Strategy #1

Some of us counted by tens and ones.

[Teacher points to the base ten blocks on the chart and counts 10, 20, 30, 40, 50, 60, 70, 71, 72, 73, 74, 75]

Strategy #2

Some of us added by place value.

[Teacher points to the equations on the chart and shows adding the tens $50 + 20$ to get 70. Then, adding the ones, $2 + 3$ to get 5. Finally, combining those sums together, $70 + 5$, to equal 75.]

Strategy #3

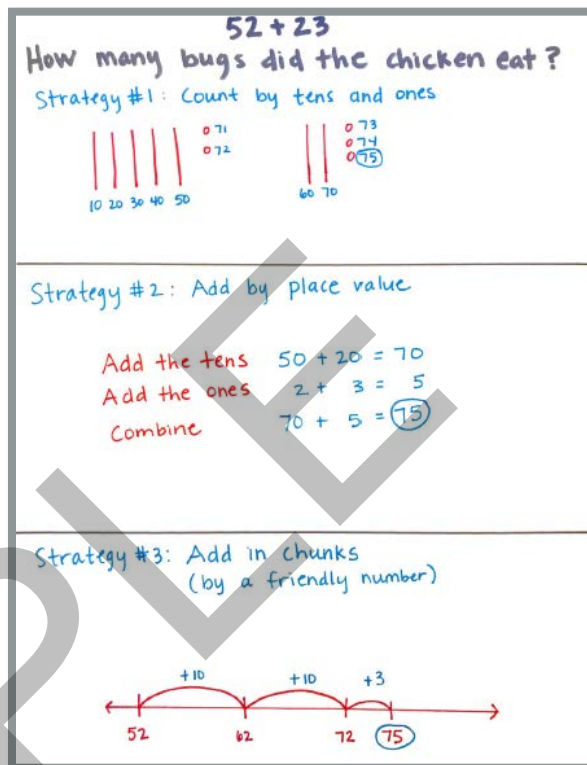
And some of us started with 52 and added up in chunks using friendly numbers.

[Teacher points to the number line on the chart to show beginning at 52, making a friendly jump of 10 to get to 62, and then another friendly jump of 10 to get to 72, and finally a jump of 3 to get to 75.]

Turn and Talk: Say, “Turn and tell your partner where you see our problem, $52 + 23$, on the number line in strategy #3. Where is the 52? Where is the 23? Where is our sum?”

Today, we showed three different ways we can solve the problem using efficient strategies. In your Practice Problem, I want you to use one of these strategies that makes the most sense to you.


[As you circulate, look for students who are still counting by ones and nudge them towards trying strategy #1-counting by tens and ones.]



Practice Problem
[5-7 min]

Students will now solve one practice problem on their own.

The farmer loved his horses the most! He had 38 brown horses and 41 black horses. How many horses did the farmer have?

Math Story A3		 30 minutes
<p>How Many Ants?</p> <p>There were 29 little red ants that lived in an ant hole on the farm. Then 31 more ants came to live in the ant hole. How many ants live in the ant hole?</p>		
Engage [5 min]	<ol style="list-style-type: none"> 1. Show Engage image for MS 3. [See NHA provided PPT] 2. Pose a Turn and Talk: What do you notice? What do you wonder? 3. Call on multiple students to share. [Option to record responses] 	
Problem [10-12 min]	<i>Visualize</i>	<p>A. Ask students to close their eyes or to look at the picture from the Engage and visualize what is happening while you tell the context of the math story.</p> <p style="text-align: center;"><i>There were 29 little red ants that lived in an ant hole on the farm. Then 31 more ants came to live in the ant hole.</i></p>
	<i>Retell</i>	<p>B. <i>Think</i> – Have students think about what they heard in the story. <i>What did you hear first? What did you hear next?</i></p> <p><i>Pair</i> – <i>Retell the story to your partner.</i></p> <p><i>Share</i> – Call on one or two students to retell the story, using the questions: <i>What did you hear first? What did you hear next?</i></p>
	<i>Re-read</i>	<p>C. Read the problem again with the question:</p> <p style="text-align: center;"><i>Now I'm going to read the story again, but this time I have a question I want you to think about. There were 29 little red ants that lived in an ant hole on the farm. Then 31 more ants came to live in the ant hole. <u>How many ants live in the ant hole?</u></i></p>
	<i>Make Sense</i>	<p>D. Pose a Think, Pair, Share question to allow students to estimate and/or explore reasonable solutions:</p> <p style="text-align: center;"><i>Will there be more than 50 ants or less than 50 ants in the ant hole? How do you know?</i></p>
<i>Solve</i>	<p>E. Ask students to model the problem using cubes, pictures, and/or numbers and to document the strategy they chose on their recording sheet</p>	


	<p>F. Now that you have a visual image of what is happening in today's story, I want you to work on this problem using whatever strategy or tools you need to help you solve. While you are working remember to:</p> <ol style="list-style-type: none"> 1. Solve the problem using cubes, a picture, or numbers. 2. After you have solved the problem, try to come up with another way to solve. 3. Be able to explain how you solved.
Circulate & Ask Question	<p>G. Circulate, listen, and observe student thinking. Then ask probing questions to elicit student thinking, determine strategy, and connect students back to the context of the math story.</p> <p>Start with eliciting student thinking:</p> <ul style="list-style-type: none"> • Tell me about: <ul style="list-style-type: none"> ○ your picture ○ what you did with your math tools ○ what your numbers mean <p>Use additional questions to extend student thinking as appropriate (examples):</p> <ul style="list-style-type: none"> • What does your equation/numbers mean? • How could you show that with a picture? • How could you label your picture to make it clear? • Could you show me what you mean with manipulatives? • How could you represent that with an equation/with numbers? <p><i>For students who have difficulty getting started, take them back to the context of the story using the following questions to prompt: What did you hear first in the story? Next? How could you show that with your math tools (or with a picture)?</i></p>
Choose	<p>H. <i>While circulating,</i> identify 2-3 students to share strategies in the order of least efficient to most efficient. Look for students who:</p> <ul style="list-style-type: none"> ○ counted by tens and ones ○ place value ○ added in chunks

- A. Record student strategies on an anchor chart or a whiteboard to capture student thinking and to refer to in discussion.

29 + 31

How many ants live in the ant hole?

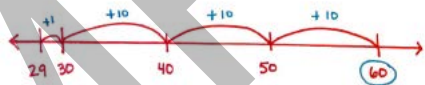
Strategy #1: Count by tens and ones



Strategy #2: Add by place value

Add the tens $20 + 30 = 50$
 Add the ones $9 + 1 = 10$
 Combine $50 + 10 = 60$

Strategy #3: Add in chunks
 (to get to a friendly number)



- B. Turn and Talk question: Say, “ [Insert student’s name] used a strategy where [he/she] added by place value (point to second strategy). How are strategy #1 and #2 the same and how are they different?” Listen to see if students are able to describe where they see the numbers from strategy 2 in the base-ten drawing in strategy #1.

Discussion
[7-8 min]

Key Points
 [2-4 min]

A. I noticed there were different ways to solve our math story.
Strategy #1

Some of us counted by tens and ones.

[Teacher points to the base ten blocks on the chart and counts 10, 20, 30, 40, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60]

Strategy #2

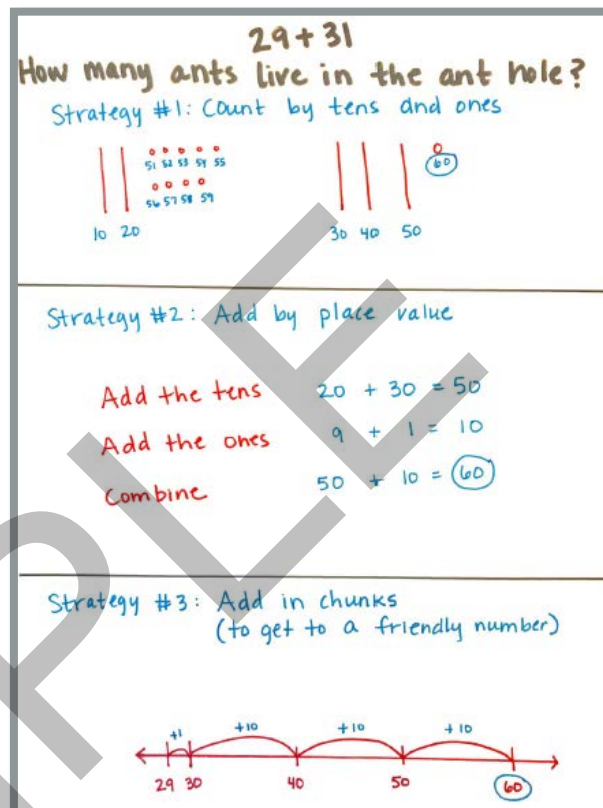
Some of us added by place value.

[Teacher points to the equations on the chart and shows adding the tens, $20 + 30$, to get 50. Then, adding the ones, $9 + 1$, to get 10. Finally, combining those sums together, $50 + 10$, to equal 60.]

Strategy #3

And some of us started with 29 and added up in chunks by getting to a friendly number.

[Teacher points to the number line on the chart to show beginning at 29, making a jump of +1 to get to the friendly number of 30, and then jumping by 10 to get to 40, another jump of 10 to get to 50, and another 10 to get to 60.]



Turn and Talk: Turn and tell your partner where you see our problem, $29 + 31$, on the number line in strategy 3. Where is the 29? Where is the 31? Where is our sum?


Today we showed three different ways we can solve the problem using efficient strategies. In your Practice Problem, I want you to use one of these strategies that makes the most sense to you.

[As you circulate, look for students who are still counting by ones and nudge them towards trying strategy #1- counting by tens and ones.]

Practice Problem
 [5-7 min]

Students will now solve one practice problem on their own.

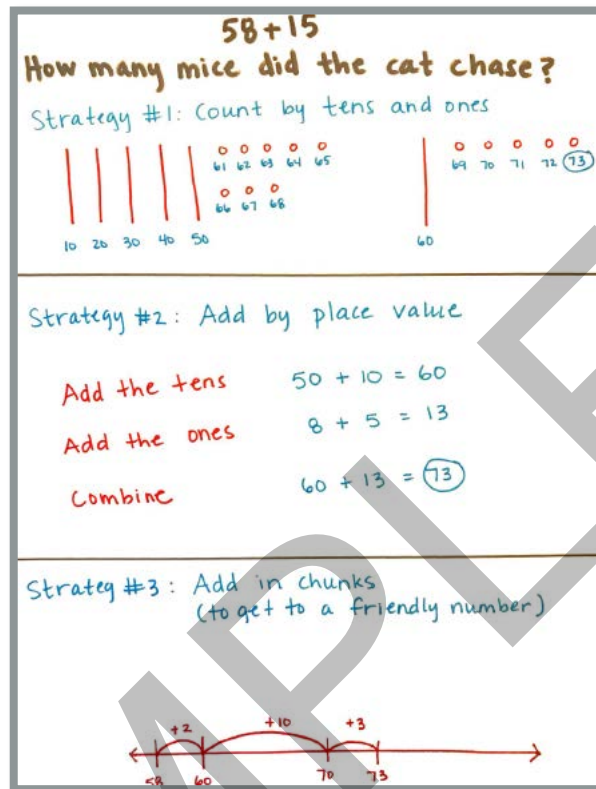
A beehive was hanging in the tree above the ant hole. There were 39 bees inside the hive and 42 bees flying around outside the hive. How many bees were there?

Math Story A4		 30 minutes
<p>How Many Mice?</p> <p>The cat loves to chase mice on the farm. The cat chased 58 mice in the morning, and then chased 15 mice in the evening. How many mice did the cat chase that day?</p>		
Engage [5 min]	<ol style="list-style-type: none"> 1. Show Engage image for MS 4. [See NHA provided PPT] 2. Pose a Turn and Talk: What do you notice? What do you wonder? 3. Call on multiple students to share. [Option to record responses] 	
Problem [10-12 min]	<i>Visualize</i>	<p>A. Ask students to close their eyes or to look at the picture from the Engage and visualize what is happening while you tell the context of the math story.</p> <p><i>The cat loves to chase mice on the farm. The cat chased 58 mice in the morning, and then chased 15 mice in the evening.</i></p>
	<i>Retell</i>	<p>B. <i>Think</i> – Have students think about what they heard in the story. <i>What did you hear first? What did you hear next?</i></p> <p><i>Pair</i> – <i>Retell the story to your partner.</i></p> <p><i>Share</i> – Call on one or two students to retell the story, using the questions: <i>What did you hear first? What did you hear next?</i></p>
	<i>Re-read</i>	<p>C. Read the problem again with the question:</p> <p><i>Now I'm going to read the story again, but this time I have a question I want you to think about. The cat loves to chase mice on the farm. The cat chased 58 mice in the morning, and then chased 15 mice in the evening. <u>How many mice did the cat chase that day?</u></i></p>
	<i>Make Sense</i>	<p>D. Pose a Think, Pair, Share question to allow students to estimate and/or explore reasonable solutions.</p> <p><i>Did the cat chase more than 70 or less than 70 mice? How do you know?</i></p>
	<i>Solve</i>	<p>E. Ask students to model the problem using cubes, pictures, and/or numbers and to document the strategy the chose on their recording sheet).</p>

	<p>F. Now that you have a visual image of what is happening in today's story, I want you to work on this problem using whatever strategy or tools you need to help you solve. While you're working remember to:</p> <ol style="list-style-type: none"> 1. Solve the problem using cubes, a picture, or numbers. 2. After you have solved the problem, try to come up with another way to solve. 3. Be able to explain how you solved.
Circulate & Ask Question	<p>G. Circulate, listen, and observe student thinking. Then ask probing questions to elicit student thinking, determine strategy, and connect students back to the context of the math story.</p> <p>Start with eliciting student thinking:</p> <ul style="list-style-type: none"> • Tell me about: <ul style="list-style-type: none"> ○ your picture ○ what you did with your math tools ○ what your numbers mean <p>Use additional questions to extend student thinking as appropriate (examples):</p> <ul style="list-style-type: none"> • What does your equation/numbers mean? • How could you show that with a picture? • How could you label your picture to make it clear? • Could you show me what you mean with manipulatives? • How could you represent that with an equation/with numbers? <p><i>For students who have difficulty getting started, take them back to the context of the story using the following questions to prompt: What did you hear first in the story? Next? How could you show that with your math tools (or with a picture)?</i></p>
Choose	<p>H. While circulating, identify 2-3 students to share strategies in the order of least efficient to most efficient. Look for students who:</p> <ul style="list-style-type: none"> ○ counted by tens and ones ○ used place value ○ added in chunks

Discussion
[7-8 min]

- A. Record student strategies on an anchor chart or a whiteboard to capture student thinking and refer to in the discussion.



- B. Turn and Talk Question: **Say, “[Insert student’s name] used a strategy where [she/he] added by counting by tens and ones (point to first strategy). Is there another way we could have counted this? Turn to your partner and discuss. Listen for students who recognize that we can group 10 ones to make a new ten. Scaffolding questions (if needed): How many ones do we have? Is there a way to group these to make counting faster instead of counting them one by one?**

Key Points
 [2-4 min]

A. I noticed there were different ways to solve our math story.
Strategy #1

Some of us counted by tens and ones.

[Teacher points to the base ten blocks on the chart and counts 10, 20, 30, 40, 50, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73]

Strategy #2

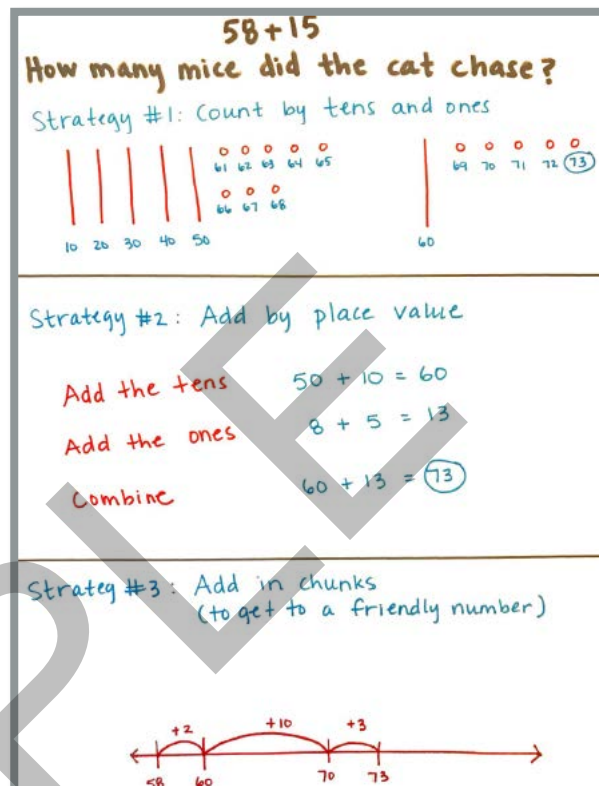
Some of us added by place value.

[Teacher points to the equations on the chart and shows adding the tens, $50 + 10$, to get 60. Then, adding the ones, $8 + 5$, to get 13. Finally, combining those sums together, $60 + 13$, to equal 73.]

Strategy #3

And some of us started with 58 and added up in chunks to get to a friendly number.

[Teacher points to the number line on the chart to show beginning at 58, making a jump of 2 to get to the friendly number of 60, jumping by 10 to get to 70, and then by 3 to get to 73.]



Turn and Talk: Turn and tell your partner where you see our problem, $58 + 15$, on the number line in strategy #3. Where is the 58? Where is the 15? Where is our sum?

Option: You may consider showing a 4th strategy where a student added in chunks using a friendly number. For example, begin at 58, make a jump of 10 to get to 68, then a jump of 5 to get to 73 (or some combination of 5).


Optional Turn and Talk: Turn and Talk to your partner – what is the same and what is different about Strategy 3 and Strategy 4? Listen for: both use a number line, both begin at 58, Strategy 3 makes a jump of 2 to get to a friendly number but Strategy 4 makes a jump using the friendly number 10.

Today we showed three different ways we can solve the problem using efficient strategies. In your Practice Problem, I want you to use one of these strategies that makes the most sense to you.

[As you circulate, look for students who are still counting by ones and nudge them towards trying strategy #1- counting by tens and ones.]

Practice Problem [5-7 min]	<p>Students will now solve one practice problem on their own.</p> <p><i>The farm is home to many types of birds. One day the farmer spotted 28 blue jays. The next morning, the farmer saw 65 cardinals. How many birds did the farmer see?</i></p>
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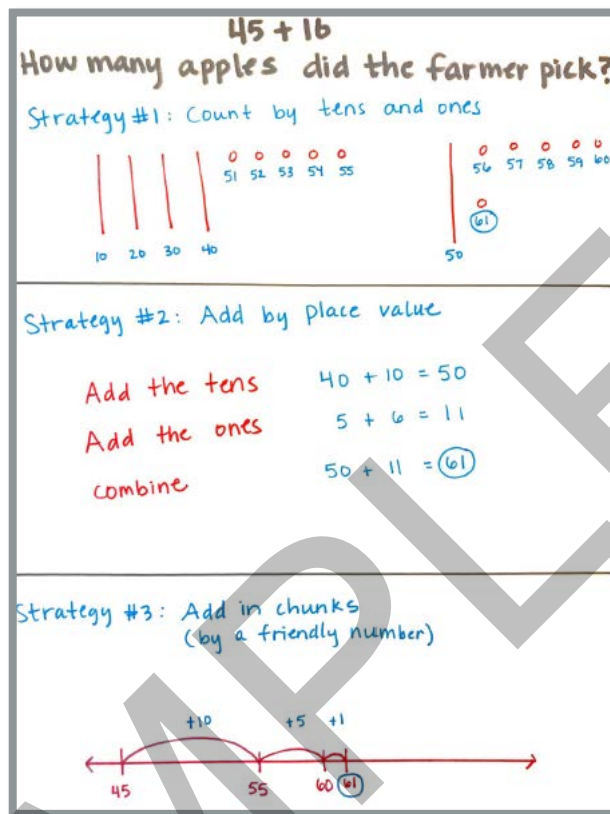
SAMPLE

Math Story A5		 30 minutes
<p>How Many Apples?</p> <p>The farm also has many fruit trees. One day, the farmer picked 45 apples from one apple tree, and 16 apples from another tree. How many apples did he pick?</p>		
Engage [5 min]	<ol style="list-style-type: none"> 1. Show Engage image for MS 5. [See NHA provided PPT] 2. Pose a Turn and Talk: <i>What do you notice? What do you wonder?</i> 3. Call on multiple students to share. [Option to record responses] 	
Problem [10-12 min]	<i>Visualize</i>	<p>A. Ask students to close their eyes or to look at the picture from the Engage and visualize what is happening while you tell the context of the math story.</p> <p style="text-align: center;"><i>The farm also has many fruit trees. One day, the farmer picked 45 apples from one apple tree, and 16 apples from another tree.</i></p>
	<i>Retell</i>	<p>B. <i>Think</i> – Have students think about what they heard in the story. <i>What did you hear first? What did you hear next?</i></p> <p style="text-align: center;"><i>Pair – Retell the story to your partner.</i></p> <p><i>Share</i> – Call on one or two students to retell the story, using the questions: <i>What did you hear first? What did you hear next?</i></p>
	<i>Re-read</i>	<p>C. Read the problem again with the question:</p> <p style="text-align: center;"><i>Now I'm going to read the story again, but this time I have a question I want you to think about. The farm also has many fruit trees. One day, the farmer picked 45 apples from one apple tree, and 16 apples from another tree. <u>How many apples did he pick?</u></i></p>
	<i>Make Sense</i>	<p>D. Pose a Think, Pair, Share question to allow students to estimate and/or explore reasonable solutions.</p> <p style="text-align: center;"><i>Before you start solving, I want you to think about Did the farmer pick more than 55 apples or less than 55 apples from the trees? How do you know?</i></p>
	<i>Solve</i>	<p>E. Ask students to model the problem using cubes, pictures, and/or numbers and to document the strategy they chose on their recording sheet.</p>

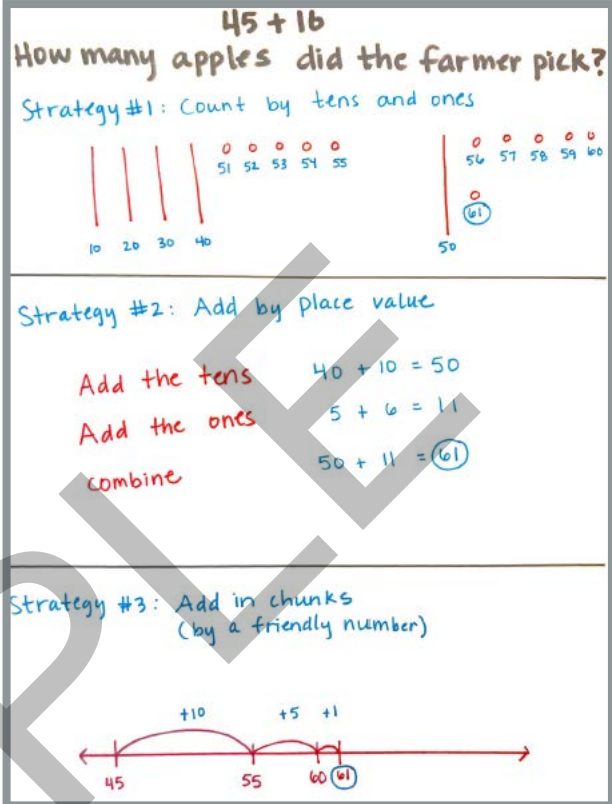
	<p>F. Now that you have a visual image of what is happening in today's story, I want you to work on this problem using whatever strategy or tools you need to help you solve. While you're working, remember to:</p> <ol style="list-style-type: none"> 1. Solve the problem using cubes, a picture, or numbers. 2. After you have solved the problem, try to come up with another way to solve. 3. Be able to explain how you solved.
Circulate & Ask Question	<p>G. Circulate, listen, and observe student thinking. Then ask probing questions to elicit student thinking, determine strategy, and connect students back to the context of the math story.</p> <p>Start with eliciting student thinking:</p> <ul style="list-style-type: none"> • Tell me about: <ul style="list-style-type: none"> ○ your picture ○ what you did with your math tools ○ what your numbers mean <p>Use additional questions to extend student thinking as appropriate (examples):</p> <ul style="list-style-type: none"> • What does your equation/numbers mean? • How could you show that with a picture? • How could you label your picture to make it clear? • Could you show me what you mean with manipulatives? • How could you represent that with an equation/with numbers? <p><i>For students who have difficulty getting started, take them back to the context of the story using the following questions to prompt: What did you hear first in the story? Next? How could you show that with your math tools (or with a picture)?</i></p>
Choose	<p>H. While circulating, identify 2-3 students to share strategies in the order of least efficient to most efficient. Look for students who:</p> <ul style="list-style-type: none"> ○ counted by tens and ones ○ used place value ○ added in chunks

Discussion
[7-8 min]

- A. Record student strategies on an anchor chart or a whiteboard to capture student thinking and refer to in the discussion.



- B. Turn and Talk Question: Say, “[Insert student’s name] used a strategy where [he/she] added by place value (point to second strategy). Turn and talk to your partner – how can we add $50 + 11$? What strategy did you use to get the answer of 61? Listen for students who are counting on from 50 and counting one by one to add on the 11. Affirm their strategy and ask them to listen to the strategy shared during whole group share out. Choose a student to share who can describe decomposing 11 into 10 and 1, adding $50 + 10 = 60$, $60 + 1 = 61$.”

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Key Points [2-4 min]</p>	<p>A. I noticed there were different ways to solve our math story.</p> <p>Strategy #1 Some of us counted by tens and ones. [Teacher points to the base ten blocks on the chart and counts 10, 20, 30, 40, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60, 61]</p> <p>Strategy #2 Some of us added by place value. [Teacher points to the equations on the chart and shows adding the tens, $40 + 10$, to get 50. Then, adding the ones, $5 + 6$, to get 11. Finally, combining those sums together, $50 + 11$, to get 61.]</p> <p>Strategy #3 And some of us started with 45 and added up in chunks by using a friendly number. [Teacher points to the number line on the cart to show beginning at 45, making a jump of 10 to 55, a jump of 5 to the friendly number of 60, and then a jump of 1 to get to 61.]</p> <p>Turn and Talk: Turn and tell your partner – is there another way we can add up in chunks?</p> <p>Today we showed three different ways we can solve the problem using efficient strategies. In your Practice Problem, I want you to use one of these strategies that makes the most sense to you. [As you circulate, look for students who are still counting by ones and nudge them towards trying strategy #1- counting by tens and ones.]</p> 
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Practice Problem [5-7 min]</p>	<p>Students will now solve one practice problem on their own.</p> <p>The farmer also had a strawberry patch on the farm. He loved to pick strawberries to use for pies! One day, the farmer picked 57 strawberries after breakfast and 29 strawberries after lunch. How many strawberries did the farmer pick?</p>

NORTH CAROLINA
MIDDLE SCHOOL
MATHEMATICS

Second Edition

Unit 1
Rigid Transformations
and Congruence

NC
GRADE 8



SAMPLE



All materials adapted from
Open Up Resources



openupresources.org

Unit 1 – Rigid Transformations

Unit 1 Overview

Topic A – Rigid Transformations

Lesson 1 Moving on a Plane
 Lesson 2 Naming the Moves
 Lesson 3 Grid Moves
 Lesson 4 Making the Moves
 Lesson 5 Coordinate Moves *[Activity 2 is optional]*
 Lesson 6 Describing Transformations

Topic B – Properties of Rigid Transformations

Lesson 7 No Bending or Stretching
 Lesson 8 Rotation Patterns
 Lesson 9 Moves in Parallel
 Lesson 10 Composing Figures

Topic C – Congruence

Lesson 11 What is the Same?
 Lesson 12 Congruent Polygons
 Lesson 13 Congruence

Topic D – Polygons

Lesson 14 Alternate Interior Angles
 Lesson 15 Adding the Angles in a Triangle
 Lesson 16 Parallel Lines and the Angles in a Triangle

Topic E – Let's Put it to Work

Lesson 17 Rotate and Tessellate

Unit 1 Black Line Masters

Unit 1 Practice Problems and Solutions

Unit 1: Rigid Transformations & Congruence



Standards

• NC.8.G.1 • NC.8.G.2 • NC.8.G.3 • NC.8.G.5

Rigid Transformations & Congruence → Topics A-E	
Topic A: Rigid Transformations	NC.8.G.2 • NC.8.G.3
Topic B: Properties of Rigid Transformations	NC.8.G.2
Topic C: Congruence	NC.8.G.1 • NC.8.G.2
Topic D: Angles in a Triangle	NC.8.G.2 • NC.8.G.5
Topic E: Let's Put it to Work	NC.8.G.2

OPTIONAL SUGGESTED SEQUENCE				
Day 1	Day 2	Day 3	Day 4	Day 5
Topic A Lesson 1 Moving on a Plane	Topic A Lesson 2 Naming the Moves	Topic A Lesson 3 Grid Moves	Topic A Lesson 4 Making the Move	Topic A Lesson 5 Coordinate Moves
Day 6	Day 7	Day 8	Day 9	Day 10
Topic A Lesson 6 Describing Transformations	Topic B Lesson 7 No Bending or Stretching	Topic B Lesson 8 Rotation Patterns	Topic B Lesson 9 Moves in Parallel	Lesson B Lesson 10 Composing Figures
Day 11	Day 12	Day 13	Day 14	Day 15
Topic C Lesson 11 What is the Same?	Topic C Lesson 12 Congruent Polygons	Topic C Lesson 13 Congruence	Topic D Lesson 14 Alternate Interior Angles	Topic D Lesson 15 Adding the Angles in a Triangle
Day 16	Day 17	Day 18		
Topic D Lesson 16 Parallel Lines and Angles in a Triangle	Topic E Let's Put it to Work	Unit 1 Review and Assessment		



Rigid Transformations & Congruence - Overview

Work with transformations of plane figures in grade 8 draws on earlier work with geometry and geometric measurement. Students began to learn about two- and three-dimensional shapes in kindergarten, and continued this work in grades 1 and 2, composing, decomposing, and identifying shapes. Students' work with geometric measurement began with length and continued with area. Students learned to "structure two-dimensional space," that is, to see a rectangle with whole-number side lengths as composed of an array of unit squares or composed of iterated rows or iterated columns of unit squares. In grade 3, students distinguished between perimeter and area. They connected rectangle area with multiplication, understanding why (for whole-number side lengths) multiplying the side lengths of a rectangle yields the number of unit squares that tile the rectangle.

They used area diagrams to represent instances of the distributive property. In grade 4, students applied area and perimeter formulas for rectangles to solve real-world and mathematical problems, and learned to use protractors. In grade 5, students extended the formula for the area of rectangles to rectangles with fractional side lengths. In grade 6, students combined their knowledge of geometry and geometric measurement to produce formulas for the areas of parallelograms and triangles, using these formulas to find surface areas of polyhedra. In grade 7, students worked with scaled copies and scale drawings, learning that angle measures are preserved in scaled copies, but areas increase or decrease proportionally to the square of the scale factor. Their study of scaled copies was limited to pairs of figures with the same rotation and mirror orientation. Viewed from the perspective of grade 8, a scaled copy is a dilation and translation, not a rotation or reflection, of another figure.

In grade 8, students extend their reasoning to plane figures with different rotation and mirror orientations. Through activities designed and sequenced to allow students to make sense of problems and persevere in solving them (MP1), students use and extend their knowledge of geometry and geometric measurement. They begin the unit by looking at pairs of cartoons, each of which illustrates a translation, rotation, or reflection. Students describe in their own words how to move one cartoon figure onto another.

As the unit progresses, they solidify their understanding of these transformations, increase the precision of their descriptions (MP6), and begin to use associated terminology, recognizing what determines each type of transformation, e.g., two points determine a translation. They identify and describe translations, rotations, and reflections, and sequences of these. In describing images of figures under rigid transformations on and off square grids and the coordinate plane, students use the terms "corresponding points," "corresponding sides," and "image." Students learn that angles and distances are preserved by any sequence of translations, rotations, and reflections, and that such a sequence is called a "rigid transformation." They learn the definition of "congruent": two figures are said to be congruent if there is a rigid transformation that takes one figure to the other.

Students experimentally verify the properties of translations, rotations, and reflections, and use these properties to reason about plane figures, understanding informal arguments showing that the alternate interior angles cut by a transversal have the same measure and that the sum of the angles in a triangle is 180° . The latter will be used in a subsequent grade 8 unit on similarity and dilations. Throughout the unit, students discuss their mathematical ideas and respond to the ideas of others (MP3, MP6).

Many of the lessons in this unit ask students to work on geometric figures that are not set in a real-world context. This design choice respects the significant intellectual work of reasoning about area.

Tasks set in real-world contexts are sometimes contrived and hinder rather than help understanding. Moreover, mathematical contexts are legitimate contexts that are worthy of study. Students do have opportunities in the unit to tackle real-world applications. In the culminating activity of the unit, students examine and create different patterns formed by plane figures. This is an opportunity for them to apply what they have learned in the unit (MP4).

In this unit, several lesson plans suggest that each student have access to a *geometry toolkit*. These contain tracing paper, graph paper, colored pencils, scissors, ruler, protractor, and an index card to use as a straightedge or to mark right angles, giving students opportunities to develop their abilities to select appropriate tools and use them strategically to solve problems (MP5). Note that even students in a digitally enhanced classroom should have access to such tools; apps and simulations should be considered additions to their toolkits, not replacements for physical tools.

SAMPLE

8th IM Topic at a Glance

Unit 1: Rigid Transformations & Congruence

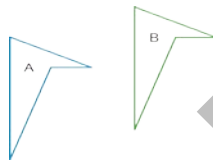
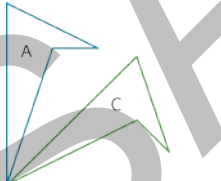




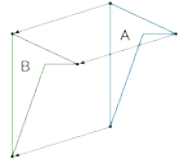
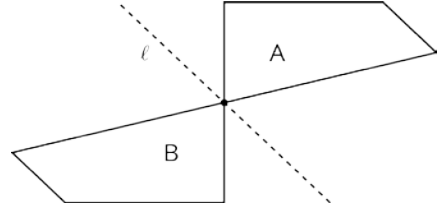
Topic A: Rigid Transformations



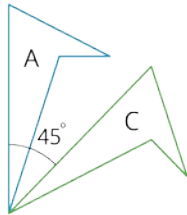
NC.8.G.2 Use transformations to define congruence.

• Verify experimentally the properties of rotations, reflections, and translations that create congruent figures.

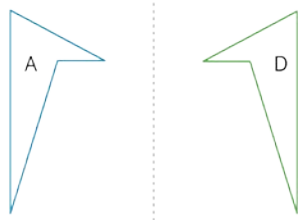
NC.8.G.3 Describe the effect of dilations about the origin, translations, rotations about the origin in 90 degree increments, and reflections across the x-axis and y-axis on two-dimensional figures using coordinates.

Lesson 1	Lesson 1.1 Moving on a Plane I can describe how figures move on a plane	
	Key Points	Exit Ticket
	Here are two ways for changing the position of a figure in a plane without changing its shape or size: <ul style="list-style-type: none"> Sliding or shifting the figure without turning it. Shifting Figure A up and to the right puts it in the position of Figure B.  <ul style="list-style-type: none"> Turning or rotating the figure around a point. Figure A is rotated around the bottom vertex to create Figure C. 	Here are successive positions of a shape: <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid black; padding: 5px; text-align: center;">  Frame 1 </div> <div style="border: 1px solid black; padding: 5px; text-align: center;">  Frame 2 </div> <div style="border: 1px solid black; padding: 5px; text-align: center;">  Frame 3 </div> <div style="border: 1px solid black; padding: 5px; text-align: center;">  Frame 4 </div> </div> Describe how the shape moves from: <ol style="list-style-type: none"> Frame 1 to Frame 2. Frame 2 to Frame 3. Frame 3 to Frame 4.
Lesson 2	Lesson 1.2 Naming the Moves I can describe a given translation, rotation, or reflection with greater precision	
	Key Points	Exit Ticket
	A translation slides a figure without turning it. Every point in the figure goes the same distance in the same direction. 	What type of move takes Figure A to Figure B?  <p>Explain your reasoning.</p>

A **rotation** turns a figure about a point, called the center of the rotation. Every point on the figure goes in a circle around the center and makes the same angle. The rotation can be **clockwise**, going in the same direction as the hands of a clock, or **counterclockwise**, going in the other direction.



A **reflection** places points on the opposite side of a reflection line. The mirror image is a backwards copy of the original figure. The reflection line shows where the mirror should stand.



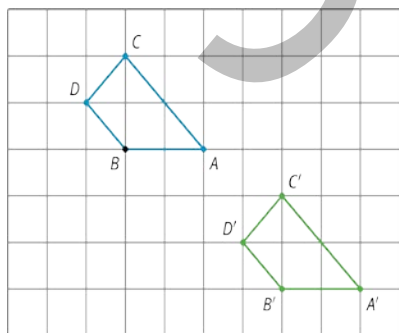
We use the word **image** to describe the new figure created by moving the original figure. If one point on the original figure moves to another point on the new figure, we call them **corresponding points**.

Lesson 1.3 Grid Moves

I can transform figures on a plane.

Key Points

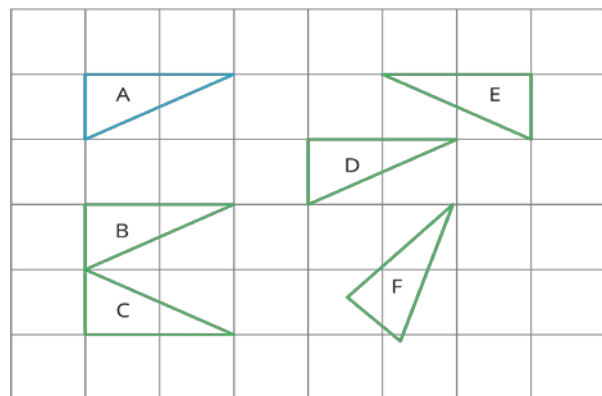
When a figure is on a grid, we can use the grid to describe a transformation.



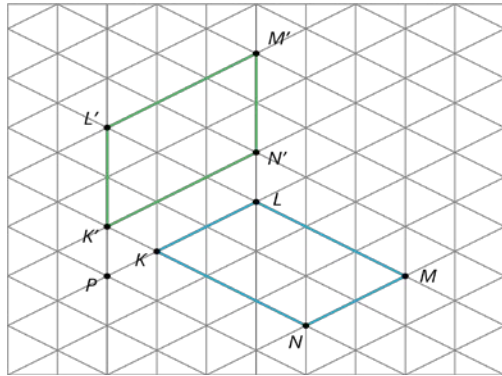
Quadrilateral $ABCD$ is translated 4 units to the right and 3 units down to the position of quadrilateral $A'B'C'D'$.

Exit Ticket

Which of these triangles are translations of Triangle A? Select **all** that apply.



A second type of grid is called an **isometric grid**. The isometric grid is made up of equilateral triangles. The angles in the triangles all measure 60 degrees, making the isometric grid convenient for showing rotations of 60 degrees.



Here is quadrilateral $KLMN$ and its image $K'L'M'N'$ after a 60-degree counterclockwise rotation around a point P .

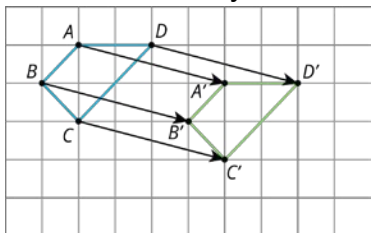
Lesson 1.4 Making the Moves

I can use the terms translation, rotation, and reflection to precisely describe transformations.

Key Points

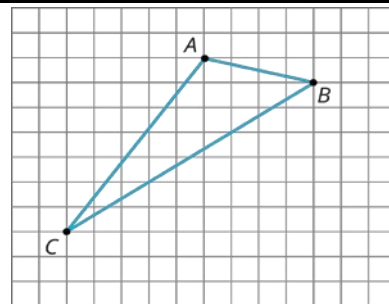
A move, or combination of moves, is called a **transformation**. When we do one or more moves in a row, we often call that a **sequence of transformations**. To distinguish the original figure from its image, points in the image are sometimes labeled with the same letters as the original figure, but with the symbol ' attached, as in A' (pronounced "A prime").

- A translation can be described by two points. If a translation moves point A to point A' , it moves the entire figure the same distance and direction as the distance and direction from A to A' . The distance and direction of a translation can be shown by an arrow.



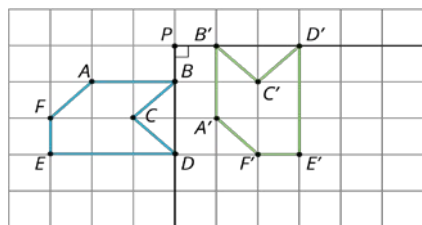
- A rotation can be described by an angle and a center. The direction of the

Exit Ticket

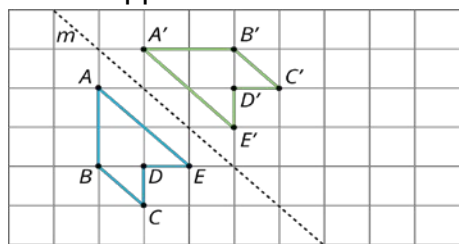


- If you were to describe a translation of triangle ABC , what information would you need to include in your description?
- If you were to describe a rotation of triangle ABC , what information would you need to include in your description?
- If you were to describe a reflection of triangle ABC , what information would you need to include in your description?

angle can be clockwise or counterclockwise.



- A reflection can be described by a line of reflection (the “mirror”). Each point is reflected directly across the line so that it is just as far from the mirror line but is on the opposite side.



Lesson 1.5 Coordinate Moves

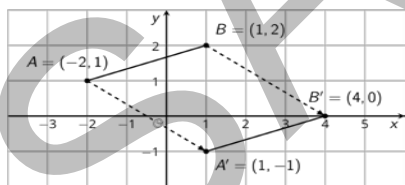
I can apply transformations to figures on a grid to see what happens to their coordinate points.

Key Points

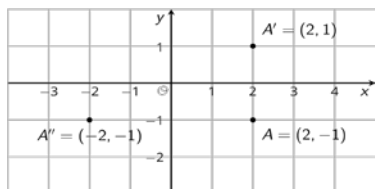
NOTE: Lesson 1.5, Activity 2 is an optional extension activity.

We can use coordinates to describe points and find patterns in the coordinates of transformed points.

We can describe a translation by expressing it as a sequence of horizontal and vertical translations.



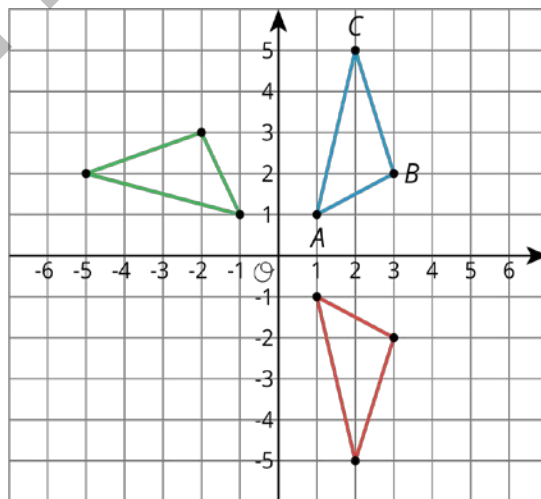
Reflecting a point across an axis changes the sign of one coordinate.



Reflections across other lines are more complex to describe.

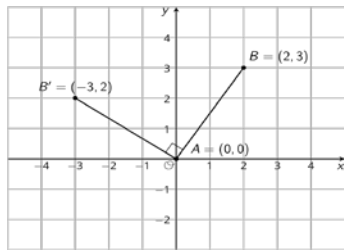
Exit Ticket

One of the triangles pictured is a rotation of triangle ABC and one of them is a reflection.



- Identify the center of rotation and label the rotated image PQR .
- Identify the line of reflection and label the reflected image XYZ .

We don't have the tools yet to describe rotations in terms of coordinates in general. Here is an example of a 90° rotation with center $(0,0)$ in a counterclockwise direction.



Point A has coordinates $(0,0)$. Segment AB was rotated 90° counterclockwise around A . Point B with coordinates $(2,3)$ rotates to point B' whose coordinates are $(-3,2)$.

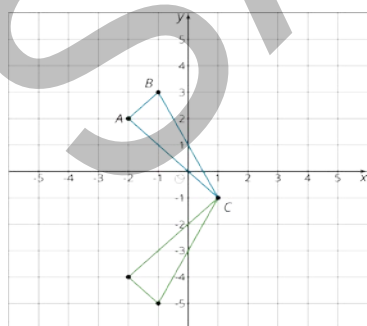
Lesson 1.6 Describing Transformations

I can transform polygons on a coordinate plane.

Key Points

The center of a rotation for a figure doesn't have to be one of the points on the figure. To find a center of rotation, look for a point that is the same distance from two corresponding points. You will probably have to do this for a couple of different pairs of corresponding points to nail it down.

When we perform a sequence of transformations, the order of the transformations can be important. Here is triangle ABC translated up two units and then reflected over the x -axis.



Here is triangle ABC reflected over the x -axis and then translated up two units.

Triangle ABC ends up in different places when the transformations are applied in the opposite order!

Exit Ticket

Jada applies two transformations to a polygon in the coordinate plane. One of the transformations is a translation and the other is a reflection. What information does Jada need to provide to communicate the transformations she has used?

Unit 1 Topic A Lesson 1 – Moving on a Plane

Standard **NC.8.G.2**

I can Describe ways figures can move in the plane.

Lesson Background:

The purpose of this lesson is to introduce students to translations and rotations of plane figures and to have them describe these movements in everyday language. Expect students to use words like “slide” and “turn.” In the next lesson, they will be introduced to the mathematical terms. The term “transformation” is not yet used and will be introduced later in a later lesson.

In all of the lessons in this unit, students should have access to their Geometry Toolkits, which should contain tracing paper, graph paper, colored pencils, scissors, ruler, protractor, and an index card. For this unit, access to tracing paper and a straight edge are particularly important. Students may not need all (or even any) of these tools to solve a particular problem. However, to make strategic choices about when to use which tools (MP5), students need to have opportunities to make those choices. Apps and simulations should supplement rather than replace physical tools.

Preparation:

You will need the Triangle Square Dance blackline master for this lesson. Make 1 copy of all 3 pages for every 2 students.

Assemble Geometry Toolkits. It would be best if students had access to these toolkits at all times throughout the unit. Toolkits include tracing paper, graph paper, colored pencils, scissors, ruler, protractor, and an index card to use as a straightedge or to mark right angles. Access to tracing paper is particularly important in this unit. Tracing paper cut to a small size (roughly 5" by 5") is best—commercially available “patty paper” is ideal for this. If using larger sheets of tracing paper, such as 8.5" by 11", cut each sheet into fourths.

Support for ELL Students:

Throughout this unit, be mindful of how words with multiple meanings like “image” are used. Use MLR 8 (Discussion Supports) to explicitly think-aloud about the appropriate times or contexts to use each particular meaning.

Materials:

- copies of blackline master
- Geometry Toolkits

Turn and Talk: Which One Doesn't Belong?

Pose Turn and Talk:

What do you notice? What do you wonder?

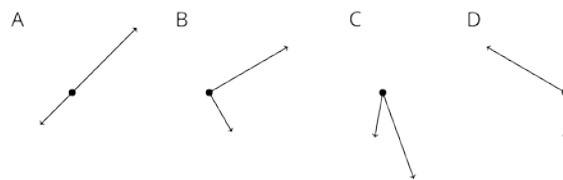
Call on multiple students to share.

[Option to record responses]

Pose Turn and Talk:

Which one doesn't belong?

Which one doesn't belong?



Engage-5 Minutes

Connection

This warm-up prompts students to compare four images. It encourages students to explain their reasoning and hold mathematical conversations. It gives you the opportunity to hear how they use terminology and talk about characteristics of the images in comparison to one another. To allow all students to access the activity, each image has one obvious reason it does not belong. Encourage students to find reasons based on mathematical properties (e.g., Figure B is the only right angle). During the discussion, listen for important ideas and terminology that will be helpful in upcoming work of the unit. The activity also gives students an opportunity to find useful tools in their geometry toolkit.

During the discussion, prompt students to explain the meaning of any terminology they use, such as ray, degree, or acute angle. Also, press students on unsubstantiated claims. For example, a student may make claims about the angle measures. Ask how they know the measure and demonstrate how the tracing paper or the ruler from the toolkit could be used to check.

Activity 1: Triangle Square Dance

Set Up

Blackline Master for Classroom Activity 2

Arrange students in groups of 2 and give a copy of all 3 blackline masters to each group. Explain that each sheet is a cartoon with 6 frames showing the moves made by the dancing figures. Instruct students to place all three sheets face up, then tell them to take turns selecting a dance and describing it to their partner, without revealing which dance they have selected. The other student identifies which dance is being described. Use MLR 2 (Collect and Display) to record language students use to describe the movement of shapes to later be grouped and connected to more formal language such as “rotation,” “translation,” etc. Give students 15 minutes to work in their groups followed by a whole-class discussion.

If using the digital activity, ask students to close their devices. Distribute the blackline masters and review the rules of the game to make sure students understand the task. Give students approximately 10 minutes to play the game. After 10 minutes, invite students to open their devices and notice how the applets correspond to the three dances. Give students an additional 5 minutes to come to consensus about how to best describe the moves in their own words before a whole-class discussion.

Support for ELL Students:

Lighter Support: MLR 8 (Discussion Supports). Allow students to practice the phrases they will say as they describe the dance. The teacher could move (as if dancing) to the right then turn halfway around. Then ask students to describe to a partner how you moved. After which students will share ideas with the class (e.g., move right then turn 180° clockwise).

Support for students in need:

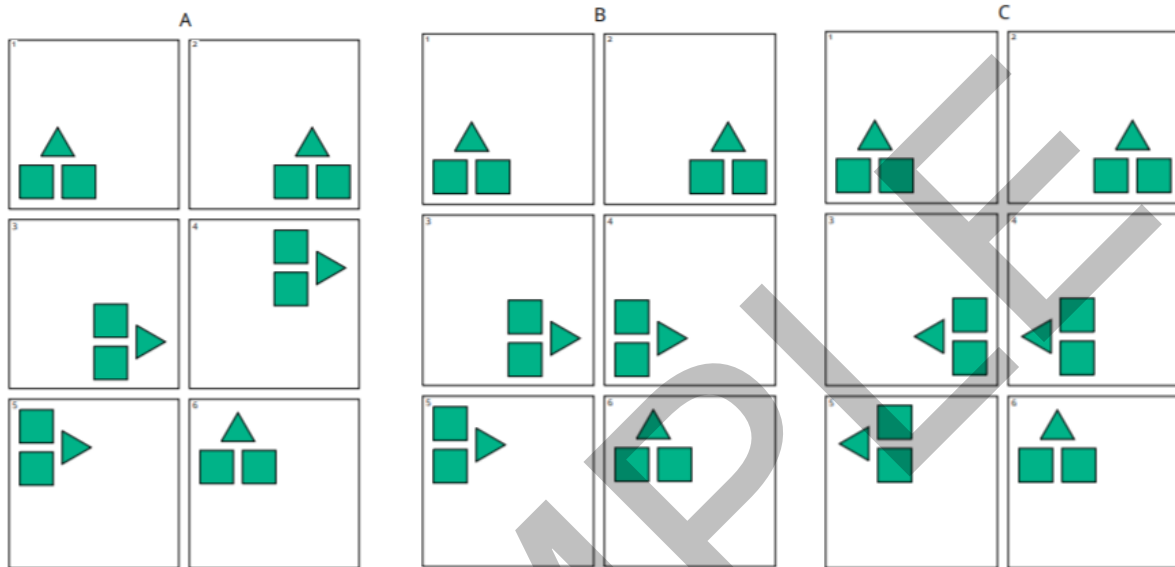
Conceptual Processing: Eliminate Barriers. Demonstrate the steps for the activity or game, in which a group of students and staff play an example round while the rest of the class observes.

Receptive/Expressive Language: Processing Time. Students who benefit from extra processing time would also be aided by MLR 8 (Discussion Supports).

Problem - 25 Minutes

Problem

- Arrange the three pictures so you and your partner can both see them right way up. Choose who will start the game.
 - The starting player mentally chooses A, B, or C and describes the dance to the other player.
 - The other player identifies which dance is being talked about: A, B, or C.
- After one round, trade roles. When you have described all three dances, come to an agreement on the words you use to describe the moves in each dance.
- With your partner, write a description of the moves in each dance.



Circulate and Ask Questions

Solution Strategy Options

A: Move right, turn 90° clockwise, move up, move left, and turn 90° counterclockwise.

B: Move right, turn 90° clockwise, move left, move up, and turn 90° counterclockwise.

C: Move right, turn 90° counterclockwise, move left, move up, and turn 90° clockwise.

The terms left, right, and up in this answer are from the point of view of an observer watching the dance. Alternatively, students might put themselves in the shoes of the triangles and describe things in terms of the triangle's left, right, up, and down.

Students might use other words, such as "shift" and "step" for translations, and "spin" and "rotate" for the turns. They might describe the 90° turns as "quarter turns."

Nudging Questions to Address Misconceptions

If a student mistakes clockwise or counterclockwise,

Then Ask: How does a clock hand move on a clock face?

Discussion - 10 Minutes	Share Strategies	Cognitive Engagement
	<p>Select one student to share their description for each of the pages and use MLR 2 (Collect and Display) to display their words and other language you observed during the activity for different types of moves.</p> <ul style="list-style-type: none"> Arrange the words in two groups, those that describe translations and those that describe rotations (but do not use these terms). Come to agreement on a word for each type and discuss what extra words are needed to specify the transformation exactly (e.g., move right, turn clockwise 90°). <p>Consider asking students what they found most challenging about describing the dances. Expected responses include being as precise as possible about the different motions (for example, describing whether the shape is rotating clockwise or counterclockwise).</p> <p>Also consider asking students if they were sometimes able to identify the dance before their partner finished describing <i>all</i> of the moves.</p> <p>All three dances begin by moving to the right, but in the second step, Dances A and B rotate 90 degrees clockwise while Dance C rotates 90 degrees counterclockwise. (So, if the second move was to rotate 90 degrees counterclockwise, this must be Dance C.) Dances A and B diverge at slide 4.</p>	<p>Before the students share, ask the audience a framing question to think about as they listen</p> <ol style="list-style-type: none"> Ask framing question Student Share their strategy Pose framing question again as Think-Pair-Share Class share out
	Connect to Learning Goal	<p>The purpose of this activity is for students to begin to observe and describe translations and rotations. In groups of 2, they describe one of 3 possible dances, presented in cartoon form, and the partner identifies which dance is being described. Identify students who use specific and detailed language to describe the dance and select them to share during class discussion.</p> <p>While students are not expected to use precise language yet, this activity both provides the intellectual need for agreeing upon common language and give students a chance to experiment with different ways of describing moves in a plane (MP6).</p>
OPTIONAL EXTENSION		
Problem	Set Up	
	“Are you Ready for more?” This is an optional activity based on student need.	
	Problem	
	<p>We could think of each dance as a new dance by running it in reverse, starting in the 6th frame and working backwards to the first.</p> <ol style="list-style-type: none"> Pick a dance and describe in words one of these reversed dances. How do the directions for running your dance in the forward direction and the reverse direction compare? 	

"Are you ready for more?" Student Response

1. Answers vary. Sample response:

A: turn 90° clockwise, move right, move down, turn 90° counterclockwise, move left,

B: turn 90° clockwise, move down, move right, turn 90° counterclockwise, move left,

C: turn 90° counterclockwise, move down, move right, turn 90° clockwise, move left

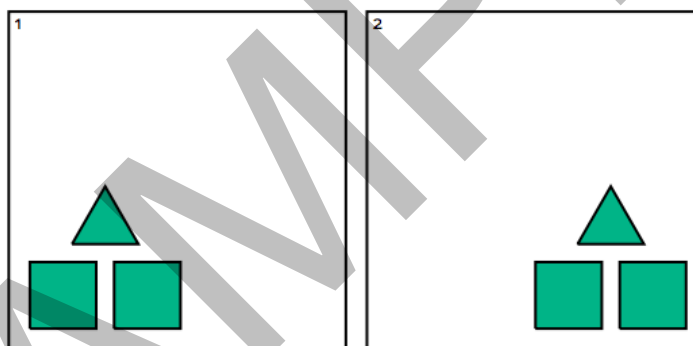
2. The steps are listed in reverse order. Right gets replaced by left and left with right and clockwise gets replaced with counterclockwise and vice versa.

State Key Points

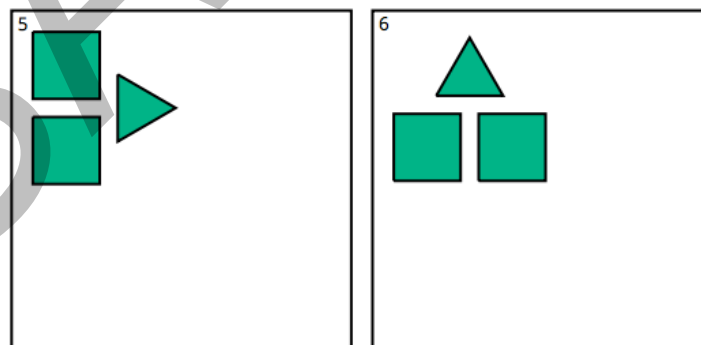
The purpose of this lesson is to introduce students to translations and rotations of plane figures and to have them describe these movements in everyday language. Expect students to use words like "slide" and "turn." In the next lesson, they will be introduced to the mathematical terms. The term "transformation" is not yet used and will be introduced later in a later lesson.

We have started to reason about what it means to move a figure in the plane. Display two figures that clearly show a slide and two figures that clearly show a turn.

Example of a slide:



Example of a turn:

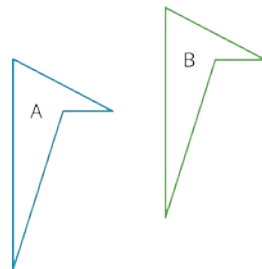


Invite students to share the language they would use to describe them: for example, "moving" or "sliding" for translations and "turning" for rotations. Consider asking students how they might quantify each move, for example with a distance and direction for the slides and a center and angle of rotation for the turns. Tell them that we will continue to look at these moves in more detail in future lessons.

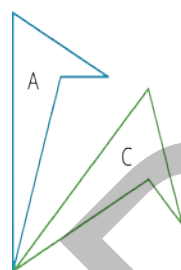
Student Notes

Here are two ways for changing the position of a figure in a plane without changing its shape or size:

Sliding or shifting the figure without turning it. Shifting Figure A up and to the right puts it in the position of Figure B.

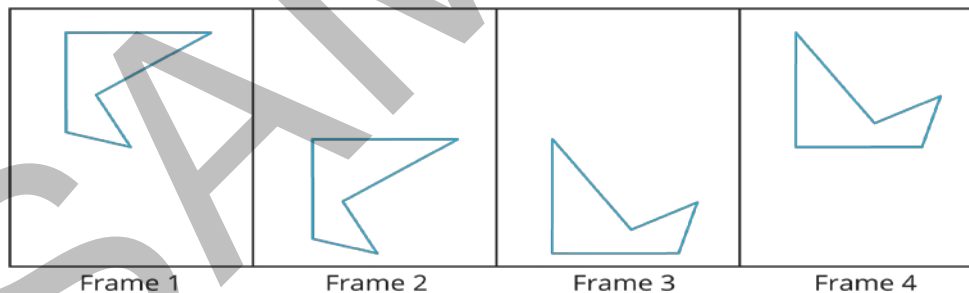


Turning or rotating the figure around a point. Figure A is rotated around the bottom vertex to create Figure C.



Problem

Here are successive positions of a shape:



Describe how the shape moves from:

1. Frame 1 to Frame 2.
2. Frame 2 to Frame 3.
3. Frame 3 to Frame 4.

Possible Solution Strategy

1. Slide down.
2. Turn counterclockwise 90 degrees (or one quarter of a full turn).
3. Slide up.



Appendix D - Yearly Academic Calendar

Carolina Scholars Academy

Carolina Scholars Academy 2027-28 School Year

August						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

July: TBD New Teacher Summit
5th-6th Staff PD
9th-13th Staff PD
16th-17th Staff PD: 16th Open House
18th First Day of School

September						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

6th Labor Day
16th Half Day; 17th Staff PD

October						
S	M	T	W	T	F	S
				1	2	
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

12th-14th PTC; 14th Half Day; 15th Regional PD
22nd End of Q1

November						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

11th Veteran's Day
24th-26th Thanksgiving Break
29th School Resumes

December						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

17th Staff PD
20th-31st Winter Break

January						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

1st New Year's Day
3rd Staff PD; 4th School Resumes
14th End of Q2
17th MLK Day

February						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29			

18th Teacher Planning
21st President's Day

March						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

14th-16th PTC; 16th Staff PD; 17th Regional PD
24th End of Q3

April						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

3rd-10th Spring Break
11th School Resumes

May						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

5th Staff PD
29th Memorial Day

June						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

9th End of Q4; last Day of School
12th-13th Teacher Workday

July						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

4th Independence Day

Students Do Not Report/ Staff Report All Day
 Students Report Half Day/ Staff Report All Day
 Students/ Staff Do Not Report

Last Update: 3/25/2025
 185 School Days
 K-5 8:00am-3:00pm School Hours
 K-5 8:00-11:45am (half)
 1070 approx. **Total Hours**



Appendix E: Daily and Weekly Schedule

Carolina Scholars Academy

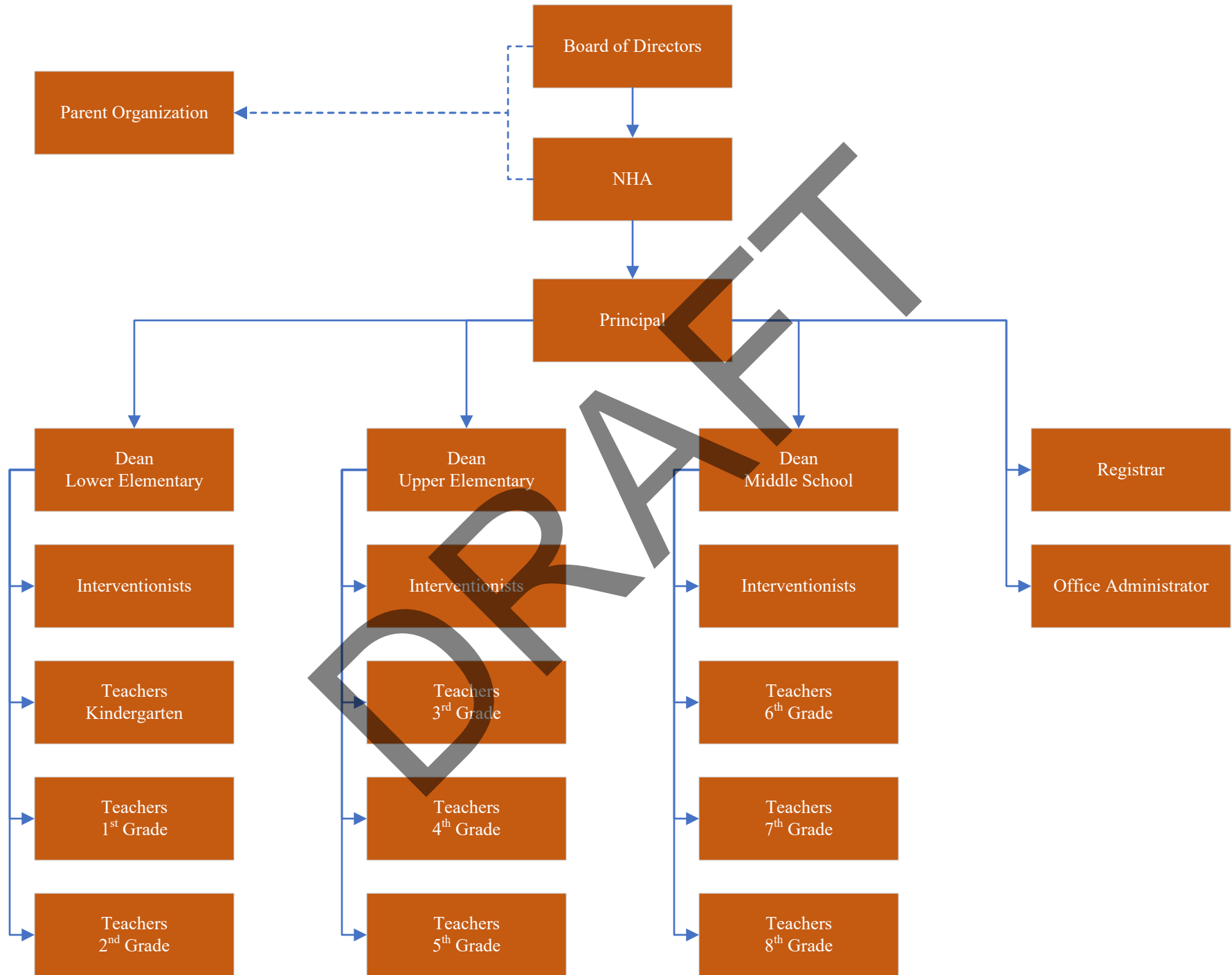
Start - End	Kinder.	Kinder.	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8
8:00 AM - 8:05 AM	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)	Moral Focus (15)
8:05 AM - 8:10 AM										
8:10 AM - 8:15 AM										
8:15 AM - 8:20 AM										
8:20 AM - 8:25 AM										
8:25 AM - 8:30 AM					PE/Recess (30)		Specials (30)			
8:30 AM - 8:35 AM										
8:35 AM - 8:40 AM										
8:40 AM - 8:45 AM				ELA (60)		Math (60)				
8:45 AM - 8:50 AM				ELA (75)						
8:50 AM - 8:55 AM					Specials (30)					
8:55 AM - 9:00 AM							PE (30)	Math (90)	ELA (90)	SCI/SS (90)
9:00 AM - 9:05 AM										
9:05 AM - 9:10 AM										
9:10 AM - 9:15 AM	ELA (120)	ELA (120)								
9:15 AM - 9:20 AM										
9:20 AM - 9:25 AM										
9:25 AM - 9:30 AM				Specials (30)						
9:30 AM - 9:35 AM						PE/recess (30)				
9:35 AM - 9:40 AM										
9:40 AM - 9:45 AM										
9:45 AM - 9:50 AM										
9:50 AM - 9:55 AM			Sci/SS (45)							
9:55 AM - 10:00 AM				PE (30)						
10:00 AM - 10:05 AM										
10:05 AM - 10:10 AM										
10:10 AM - 10:15 AM										
10:15 AM - 10:20 AM										
10:20 AM - 10:25 AM										
10:25 AM - 10:30 AM	Specials (30)	Specials (30)	PE (30)							
10:30 AM - 10:35 AM										
10:35 AM - 10:40 AM										
10:40 AM - 10:45 AM				ELA (60)						
10:45 AM - 10:50 AM										
10:50 AM - 10:55 AM										
10:55 AM - 11:00 AM	PE (30)	PE (30)	Specials (30)							
11:00 AM - 11:05 AM										
11:05 AM - 11:10 AM										
11:10 AM - 11:15 AM										
11:15 AM - 11:20 AM										
11:20 AM - 11:25 AM										
11:25 AM - 11:30 AM	ELA (30)	ELA (30)								
11:30 AM - 11:35 AM										
11:35 AM - 11:40 AM										
11:40 AM - 11:45 AM										
11:45 AM - 11:50 AM										
11:50 AM - 11:55 AM										
11:55 AM - 12:00 PM	Lunch (30)	Lunch (30)								
12:00 PM - 12:05 PM										
12:05 PM - 12:10 PM										
12:10 PM - 12:15 PM										
12:15 PM - 12:20 PM										
12:20 PM - 12:25 PM	Recess (20)	Recess (20)	Lunch (30)	Math (85)	Math (90)	Lunch (30)	Lunch (30)			
12:25 PM - 12:30 PM										
12:30 PM - 12:35 PM										
12:35 PM - 12:40 PM										
12:40 PM - 12:45 PM		ELA (15)								
12:45 PM - 12:50 PM										
12:50 PM - 12:55 PM										
12:55 PM - 1:00 PM										
1:00 PM - 1:05 PM	Math (55)									
1:05 PM - 1:10 PM										
1:10 PM - 1:15 PM										
1:15 PM - 1:20 PM										
1:20 PM - 1:25 PM										
1:25 PM - 1:30 PM										
1:30 PM - 1:35 PM										
1:35 PM - 1:40 PM										
1:40 PM - 1:45 PM										
1:45 PM - 1:50 PM										
1:50 PM - 1:55 PM										
1:55 PM - 2:00 PM										
2:00 PM - 2:05 PM										
2:05 PM - 2:10 PM	Early Dismissal (parent opt in)									
2:10 PM - 2:15 PM										
2:15 PM - 2:20 PM										
2:20 PM - 2:25 PM										
2:25 PM - 2:30 PM										
2:30 PM - 2:35 PM										
2:35 PM - 2:40 PM										
2:40 PM - 2:45 PM										
2:45 PM - 2:50 PM										
2:50 PM - 2:55 PM										
2:55 PM - 3:00 PM	Dismissal (5)		Dismissal (5)		Dismissal (5)	Dismissal (5)	Dismissal (5)	Dismissal (5)	Dismissal (5)	Dismissal (5)
3:00 PM - 3:05 PM										



Appendix G: Organizational Chart

Carolina Scholars Academy

Organizational Chart





Charter School Required Signature Certification

Note: Outlined below is a list of areas that must be certified by the proposed Board of Directors. Signatures of all Board Members must be provided in Section VII. The Board Chair must certify and provide signature in Section VIII. Any section 'Not Applicable' to the proposed charter school, indicate below with N/A and provide a brief explanation for providing such response in the corresponding text boxes.

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.

I. School Information

Name of charter school	Carolina Scholars Academy
-------------------------------	---------------------------

II. Selected Board Attorney

❖ The selected Board Attorney 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. No: <input type="checkbox"/> Yes: <input checked="" type="checkbox"/> Not yet identified: <input type="checkbox"/>	Name of Selected Board Attorney: Donna Rascoe
	Business/Law Firm Name: Cranfill Sumner LLP
	Business Address: 5440 Wade Park Boulevard, #300, Raleigh, NC 27607
	Telephone No.: 919-863-8795
	E-mail address: drascoe@cshlaw.com

III. Selected Board Auditor

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

No: Yes: Not yet identified:

Name of Selected Board Auditor: Corey VanDyke

Business/Firm Name: Plante Moran

Business Address: 750 Trade Centre Way, Suite 300, Portage, MI 49002

Telephone No.: 269-567-4648

Email address: corey.vandyke@plantemoran.com

IV. Selected CMO/EMO

❖ 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.

No: Yes: Not yet identified:

Name of Selected Management Organization: National Heritage Academies

Business Address: 3850 Broadmoor Ave SE, Grand Rapids, MI 49512

Telephone No.: 877-223-6402

Email address: abaas@nhaschools.com


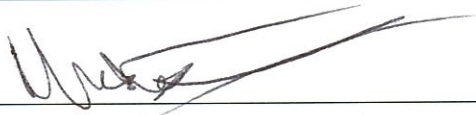



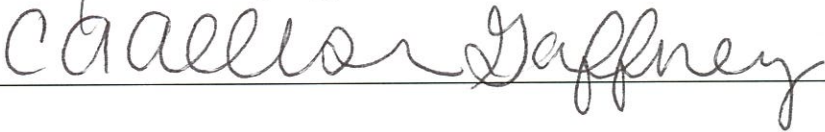
V. Selected Financial Management Service Provider

<p>❖ If contracting with a financial management service provider, the selected financial service provider has reviewed with the full Board of Directors, listed within the application, all the financial processes and services provided.</p> <p>No: <input type="checkbox"/> Yes: <input checked="" type="checkbox"/> Not yet identified: <input type="checkbox"/></p>	Name of Selected Financial Management Service Provider: Our EMO, National Heritage Academies, will provide these services.
	Business Address:
	Telephone No.:
	Email address:

VI. Selected Infinite Campus Service Provider


<p>❖ If the proposed Board of Directors, listed within the application, is contracting with a service provider to operate PowerSchool, that service provider has reviewed all of the financial processes and services provided.</p> <p>No: <input type="checkbox"/> Yes: <input checked="" type="checkbox"/> Not yet identified: <input type="checkbox"/></p>	Name of Selected PS or IC Service Provider: Our EMO, National Heritage Academies, will provide these services.
	Business Address:
	Telephone No.:
	Email address:

VII. Signatures of All Charter Board Members

1. 	2. 
3. 	4. 
5. 	6. 
7.	8.
9.	10.
11.	12.
13.	14.
15.	16.

VIII. Certification of Board Chair

I, Tykayla Livingston, 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 Charter Schools Review Board as Carolina Scholars Academy Charter School true and correct in every respect.

Signature 	Date 4-16-25
---	--------------



Appendix H: Charter School Board Member Information Form and Resume

Carolina Scholars Academy



Charter School Board Member Information Form

*Note: To be completed individually by each proposed founding charter school board member. Please include a **one-page** resume with this form and sign 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.

School Information	
Name of charter school	Carolina Scholars Academy

Board Member’s Information	
Board Members	Full name: Sierra Brooks
	Home Address: 928 Stolls LN
	Business Name & Address:
	Telephone No.: 843-260-5864
	E-mail address: brooks.sierra90@gmail.com

Board Member Application	
Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?	No: <input checked="" type="checkbox"/> Yes: <input type="checkbox"/>
Educational History	Doctor of Education in Organizational Leadership Master of Science in Health Services Administration Bachelor of Science in Biology
Employment History	Histotechnologist, Anatomic Pathology-PRN Rex Healthcare Histology Associate III-PRN Inotiv Research Science Teacher- Current North Garner Middle School
How were you recruited to join this Board of Directors?	Job recruiting website
Why do you wish to serve on the board of the proposed charter school?	To advocate for students' and teacher needs, promote education, work with families, and expand professional networks.
How were you recruited to join this Board of Directors?	Job recruiting website
Why do you wish to serve on the board of the proposed charter school?	To advocate for students' and teacher needs, promote education, work with families, and expand professional networks.
What is your understanding of the appropriate role of a public charter school board member?	The role of a board member plays a critical role in overseeing the school's governance, setting policies, ensuring it operates effectively, ethically, and in alignment with its mission and goals.
Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If	I have never served as a board member of a charter school; however, I currently serve as a coordinator for the NC Society of Histotechnologist.

<p>you have not had previous experience of this nature, explain why you can be an effective board member.</p>	<p>This role will help me in this current position to carry out the mission and vision of the charter school, also helping with building strong relationships with families and my career.</p>
<p>Describe the specific knowledge and experience that you would bring to the board.</p>	<p>I have my doctoral degree in educational leadership. I have taught in Wake County and Durham County Public Schools. I understand the needs of teachers and students.</p>

School Mission and Program

<p>What is your understanding of the school’s mission and guiding beliefs?</p>	<p>To provide a nurturing and welcoming environment for students and teachers. Also to promote successful young scholars,</p>
<p>What is your understanding of the school’s proposed educational program?</p>	<p>The school will promote high quality education, leadership, and professional development.</p>
<p>What do you believe to be the characteristics of a successful school?</p>	<p>The characteristics of a successful school are great leadership, strong core curriculum, technology innovation, parent and community involvement, and passion.</p>
<p>How will you know that the school is succeeding (or not) in its mission?</p>	<p>By family and community survey, student feedback, and testing scores.</p>

Governance

<p>Describe the role that the board will play in the school’s operation.</p>	<p>The board members are responsible for ensuring the school's success, sustainability, and ongoing improvement. By providing sufficient monitoring and strategic guidance, the board supports the school's mission and contributes to the creation of a thriving educational environment for students.</p>
<p>How will you know if the school is successful at the end of the first year of operation?</p>	<p>By academic achievements, graduation rates, school culture, teacher to student engagement, and community involvement.</p>

<p>How will you know at the end of five years of the schools is successful?</p>	<p>By academic achievements, graduation rates, quality of teaching, student transfers, school culture, teacher to student engagement, and community involvement.</p>
<p>What specific steps will the charter school board need to take to ensure that the school is successful?</p>	<p>Be very involved, create a welcoming environment, and gain partnerships.</p>
<p>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?</p>	<p>Before taking any action, I will thoroughly comprehend the problem. Gather all necessary data and evidence to support my concerns. Examine the school's bylaws, code of ethics, conflict-of-interest rules, and any applicable legal guidelines for dealing with board member behavior. Then I'd notify the entire board of chairs.</p>

<p style="text-align: center;">Certification</p>	
<p>I, <u>Sienna Brooks</u>, 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 <u>Carolina Scholar</u> Charter School is true and correct in every respect.</p>	

<p style="text-align: center;">Board Member's Signature</p>	
<p>Signature </p>	<p>Date <u>07 April 2025</u></p>

**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 and the license validity. Click or tap here to enter text.*

Sierra Brooks

Email: sierra.mcclellan@yahoo.com

Phone: 843-260-5864

Education

Doctor of Education in Organizational Leadership

June 2024

Nova Southeastern University- Ft. Lauderdale, FL

Master of Science in Health Services Administration

March 2017

Strayer University – Raleigh, North Carolina

Bachelor of Science in Biology

May 2013

Voorhees College – Denmark, South Carolina

Continue Education

North Carolina Teachers of Tomorrow

Certification

Histotechnician (ASCP)

Professional Experience

Histotechnologist, Anatomic Pathology-PRN

August 2021-Current

University of North Carolina Rex Healthcare

Raleigh, North Carolina

- Worked closely with Pathologist to carry out tasks of a Histotechnologist Embedded paraffin blocks.
- Maintained proper documentation including proper specimen handling, labeling and preparation of worksheets.
- Communicated effectively through email/in person with Pathologist, supervisor and all laboratory professionals.
- Followed SOPs under CAP/CLIA/QSR guidelines.

Histology Associate III-PRN

April 2018- Current

Inotiv

Research Triangle Park, NC

- Routine staining- using and programming of auto-strainer.
- Microtomy- produce quality sections free of aesthetic defects.
- Special staining- identify appropriate control.
- Necropsy- tissue identification.

Science Teacher

August 2020- Current

North Garner Middle School

Garner, NC

- Provide academic instruction to a group and/or individual students.
- Support learning in the regular education classroom, facilitate learning centers and provide one-on-one instruction.
- Helping school age children (7th grade) with science and/or math concepts and skill development
- Provide instructional reinforcement under the direction of the classroom teacher for individual students and/or small groups of students
- Instruct students as required by the curriculum objectives established by the school utilizing differentiated instruction techniques
- Develop daily lesson plans and classroom schedule that reflects state and school requirements



Charter School Board Member Information Form

Note: To be completed individually by each proposed founding charter school board member. Please include a **one-page** resume with this form and sign 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.

School Information

Name of charter school

Carolina Scholars Academy

Board Member's Information

Board Members

Full name: Christina Gaffney

Home Address: 1142 River Street Apt 2R Hyde Park, MA 02136

Business Name & Address:

Telephone No.: (919) 809-3208

E-mail address: christinaallison26@gmail.com

Board Member Application	
Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?	No: <input checked="" type="checkbox"/> Yes: <input type="checkbox"/>
Educational History	<ul style="list-style-type: none"> ● Graduated from High School at Word of God Christian Academy in Raleigh, NC in 2011 ● Earned Bachelor of Arts in Mass Communication with a Minor in Writing, Magna Cum Laude from North Carolina Central University in 2015 ● Obtained a Masters in Teaching in English Language Arts (Grades 5-9) from Relay Graduate School of Education
Employment History	<p><u>Brief Summary</u></p> <p>I have served as a Director of Curriculum and Instruction at a charter middle school in Massachusetts for the past five years. I will, however, transition to a Dean of Curriculum and Instruction role in Henderson, NC, this fall.</p> <p>My career began in 2015 through a partnership placement with Teach For America and Uncommon Schools, where I taught 6th-grade ELA and 7th-grade math in Brooklyn, NY. I then took on instructional coaching roles (Real-Time Feedback Coach, Instructional Coach, and Instructional Coaching Fellow), where I supported teachers in refining their instructional practices - while simultaneously teaching 5th and 6th grade ELA. In my fifth year of teaching, I served as a Dean of Curriculum and Instruction Fellow and Grade Team Leader, leading instructional initiatives, coaching teachers, and driving student achievement. This was until I stepped into a full-time leadership role as Director of Curriculum and Instruction the following year.</p> <p><u>Professional Experience Breakdown</u></p> <ul style="list-style-type: none"> ● 6th Grade ELA/7th Grade Math Teacher: 2015 - 2018 ● Real-Time Feedback Coach & Instructional Coach: 2016 - 2018 ● Instructional Coaching Fellow & Lead 5th Humanities Teacher: 2018-2019

	<ul style="list-style-type: none"> ● Dean of Curriculum and Instruction Fellow & Grade Team Leader/5th ELA 2019 - 2020 ● Director of Curriculum and Instruction: 2020 - Present
<p>How were you recruited to join this Board of Directors?</p>	<p>I originally learned about Carolina Scholars Academy through a Board of Directors job posting on LinkedIn. The listing highlighted two points that piqued my interest: a desire to find candidates committed to supporting the development of all students and those who had experience securing funding. I applied and connected with Tykayla Livingston, the President and Founder of the academy. In our conversation, I shared my professional experience in schools, interest in the board position, and my desire to support schools in North Carolina, where my passion for education began. Tykayla communicated her commitment to providing high-quality educational resources to students in the Franklin County area. We also discussed her vision for expanding school choice opportunities. At the end of our call, she asked if I was willing to support this venture, in which I happily agreed.</p>
<p>Why do you wish to serve on the board of the proposed charter school?</p>	<p>I am committed to the mission and vision of this organization for a number of reasons:</p> <ol style="list-style-type: none"> 1. As a North Carolina native, I am passionate about high-quality educational institutions and all students getting access as I was once the student who felt like I did not get everything I needed. 2. Families should have an opportunity to place their child in a high-quality school of choice. However, there are only three charter schools in this area, with only 24% of students in Franklin County having access to them. Additionally, I am committed to providing additional extracurricular activities and resources to students and families in the area. 3. I am also committed to the belief that all students can achieve and to providing personalized learning and the support necessary for them to achieve. 4. As a Director of Curriculum, I agree that students learn better when they are in the driver's seat, instead of teachers, as it promotes critical thinking skills and independence. Teachers should be facilitators of learning through inquiry based instruction.

How were you recruited to join this Board of Directors?	[Above]
Why do you wish to serve on the board of the proposed charter school?	[Above]
What is your understanding of the appropriate role of a public charter school board member?	As a board member, it is my responsibility to guarantee the academic, operational, and financial health of the school. Additionally, it would be my mission to work closely with school leadership and NHA to ensure the school continues to meet the needs of the Franklin County community, achieves its mission and values, and uses data to inform corrective actions.
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 can be an effective board member.	<p>My experience as a Director of Curriculum and Instruction has equipped me to be an effective board member. In this role, I have led the hiring, training, and coaching of teachers, improved teaching practices and drove student success — all areas that aligned to a board member's responsibility for academic oversight. Additionally, I have used data to inform curriculum adjustments and strategies, resulting in increased student achievement.</p> <p>In this role and other leadership responsibilities, I have crafted and facilitated professional development sessions, acquired and designed curriculum, and wrote and secured grant funding.</p> <p>With my experience in school leadership, professional development, and grant acquisition, I am confident that I can contribute substantially to the board by doing the following: ensuring the school fulfills its mission; providing students with high-quality education; and hiring strong leadership to spearhead data initiatives.</p>
Describe the specific knowledge and experience that you would bring to the board.	As mentioned above, I bring to my director role a wealth of knowledge in charter school and instructional leadership, educator training, data analysis, grant acquisition, and curriculum development. I am deeply passionate about expanding school choice options for families in NC and will use my experience with using data to drive achievement and securing funding to support the mission of Carolina Scholars Academy.

School Mission and Program

What is your understanding of the school’s mission and guiding beliefs?

Our mission is to inspire a love for learning through innovative, inquiry based education, fostering holistic development in a nurturing, inclusive environment, empowering students to become lifelong learners and responsible global citizens.

We envision a future where every student thrives in a dynamic and engaging educational setting that celebrates diversity, encourages critical thinking, and nurtures individual talents. Our goal is to set the standard for excellence in education by integrating cutting-edge technology, personalized learning, and collaborative projects, preparing students to excel in the rapidly changing world.

My Understanding: At Carolina Scholars Academy, we are deeply committed to fostering a safe and productive learning environment that supports the development and increased confidence of all learners through strong tier 1 instruction, personalized learning, and blended learning. Additionally, we are committed to educators serving as the facilitators of the learning, opposed to the givers of knowledge. Therefore, teachers will use inquiry based approaches and student-led projects and assignments for students to be in the driver's seat of their own learning. Through this, we are able to strengthen the confidence of students to continue to be lifelong learners, critical thinkers, and strong contributors to society.

<p>What is your understanding of the school’s proposed educational program?</p>	<p>Academic Excellence/Student Responsibility: Through our partnership with National Heritage Academy, we will provide a rigorous, standard-aligned college prep curriculum for students across kindergarten to 8th grade. We will use diagnostic data at the start of the year along with formal assessments to inform strategic tier 1 supports during the class. We will also provide personalized learning (small group approaches) and blended learning for students who may need additional support or tutoring and EXCEL-ERATE for students who are exceeding grade level mastery.</p> <p>Student Support Services: To meet the needs of all students, we will ensure the hiring of appropriate staff to support students with disabilities and multilingual learners, along with hiring school counselors and social workers. Additionally, we will make sure all classrooms are SEI classrooms, emphasizing an inclusive learning environment for all students.</p> <p>Staff Development: Staff will receive weekly coaching, regional professional development sessions, and leadership training opportunities for new or interested leaders.</p> <p>Parental Partnerships: We will prioritize frequent parent/teacher communication and parent-led organizations and events.</p>
<p>What do you believe to be the characteristics of a successful school?</p>	<p>A successful school has the following components:</p> <ul style="list-style-type: none"> ● a mission and vision and benchmarks to check progress towards it ● high quality instructional materials and supports for all learners that ensures all students’ success ● strong instruction, interventions, and student achievement data ● a safe, supportive, and inclusive environment (positive culture) ● accountability systems ● family and community engagement ● fiscal sustainability ● strong use of data systems (for academics, operations, and fiscal accountability)

<p>How will you know that the school is succeeding (or not) in its mission?</p>	<p>The school has not achieved its mission and commitment to families in Franklin County if it does not do the following:</p> <ul style="list-style-type: none"> - have high academic performance and growth data - ensure limited differential data for students with disabilities and multilingual learners in comparison to their general education counterparts - create and uphold a safe, supportive, and inclusive environment - meet data-driven goals - provide training and support for teacher development in tier 1,2,3 instruction
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Governance

<p>Describe the role that the board will play in the school's operation.</p>	<p>The board is responsible for not only agreeing upon and approving the mission and vision for the school, but also ensuring the academics, operations, and fiscal decisions are in line with the mission. We are responsible for hiring school leadership (principal) to achieve these goals; review data with the principal and NHA that informs progress towards the mission; create next steps and school improvement plans for progress in specific areas; and ensure the school is always in service of Franklin County families and students. The board will hold NHA and the school principal accountable for meeting the goals.</p>
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<p>How will you know if the school is successful at the end of the first year of operation?</p>	<p>With Carolina Scholars Academy beginning with K-5th grade, a successful first year would be as follows:</p> <ul style="list-style-type: none"> ● Retaining over 90% of our student population ● Students gaining at least a year's worth of growth on the NWEA assessment at the end of the school year ● 80% of students meeting/exceeding on unit, benchmark, EOG assessments ● Performance of students with disabilities and multilingual learners within 5% of general education peers on unit, benchmark, EOG assessments ● 90% of students meet the daily attendance ● 85% or more of students report feeling cared for and connected to the school community in survey ● 85% of families feeling as if they belong in the school community <p>Measures are subject to change based on board agreement.</p>
<p>How will you know at the end of five years of the schools is successful?</p>	<p>By the fifth year, there would have been two cohorts graduating to 9th grade. In addition to the metrics named in year one, we also want 100% of students graduating on time without the need for summer enrichment programs. Metrics are subject to change based on board agreement.</p> <p>Additional Metrics (based on Y1):</p> <ul style="list-style-type: none"> ● Retain over 90% of our student population ● Students gain at least a year's worth of growth on the NWEA assessment at the end of the school year ● 80% of students should meet/exceed on unit, benchmark, EOG assessments ● Performance of students with disabilities and multilingual learners are within 5% of general education peers on unit, benchmark, EOG assessments ● 90% of students meet the daily attendance ● 85% or more of students report feeling cared for and connected to the school community in survey ● 85% of families feeling as if they belong in the school community

<p>What specific steps will the charter school board need to take to ensure that the school is successful?</p>	<p>In order to ensure the success of Carolina Scholars Academy, we will do the following:</p> <p>Before/During the School Year:</p> <ul style="list-style-type: none"> ● Approve and monitor clear metrics in line with the mission ● Frequently review data in our meetings and walkthroughs to track progress towards our mission ● Set next steps based on current data <p>End of the School Year:</p> <ul style="list-style-type: none"> ● Design a school improvement plan based on the data
<p>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?</p>	<p>If a situation arises where a person on the board is not acting ethically or it is not in the best interests of the school and its mission, I will consult the president and legal counsel regarding next steps. I am aware that our legal counsel will provide support and advice if these situations come to fruition.</p>

Certification

I, Christina Gaffney, 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 Scholars Academy Charter School is true and correct in every respect.

Board Member's Signature

<p>Signature <u>CA Gaffney</u></p>	<p>Date <u>4/3/2025</u></p>
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**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 and the license validity. Click or tap here to enter text.*

Christina Gaffney

christinaaallison26@gmail.com | (919) 809-3208

Education

Master of Arts in Teaching, English Language Arts, Relay Graduate School of Education, New York, NY

- *Professional Development*: Teach For America (2015), The Writing Revolution: Writing & Leadership, Teach Like A Champion, High Res Coaching/Instructional Leadership
-

Professional Experience

Match Education - Match Middle School, Boston, MA

Director of Curriculum and Instruction

July 2020 - Present

- Led the hiring, training, and coaching of a team of teachers, improving instructional practices and driving student success.
- Leveraged data to guide curriculum adjustments and teaching strategies, resulting in increased student achievement.
- Designed and facilitated comprehensive professional development sessions, including pre-summer orientation and weekly whole staff and content PD sessions.
- Acquired and implemented a rigorous 6th-8th grade History curriculum; onboarded Humanities teachers to ensure its effective use and the monitoring of student outcomes.
- Wrote and secured the DESE Civics Teaching and Learning Grant, built a school library and organized a Scholastic Book Fair, raising over \$2,000 to expand library resources.

Uncommon Schools – Excellence Boys Middle Academy Charter School, Brooklyn, NY

Dean of Curriculum and Instruction Fellow & Grade Team Leader

July 2019 – June 2020

- Provided real-time instructional feedback and coaching to improve classroom management and student engagement.
- Led data-driven instructional and culture cycles, adjusting strategies to enhance student outcomes across grade levels.
- Developed and delivered high-impact professional development focused on data analysis and instructional best practices.

Key Collegiate Charter School, Brooklyn, NY

Instructional Coaching Fellow & Lead Humanities Teacher

July 2018 – June 2019

- Mentored and coached new teaching fellows, refining lesson plans and instructional delivery.
- Utilized student performance data to drive instruction and implement interventions, enhancing student achievement.
- Implemented differentiated strategies to support diverse learning needs, ensuring equitable access to high-quality education.

Uncommon Schools - Brownsville Collegiate Charter School, Brooklyn, NY

Real-Time Feedback Coach & Instructional Coach

September 2016 – May 2018

- Trained new teachers in implementing effective instructional strategies, including Teach Like A Champion techniques, enhancing classroom management and instructional delivery.

Full-time Teacher & Teach For America: 6th Grade ELA/7th Grade Math Teacher August 2015 – May 2018

- Analyzed student performance data to inform teaching strategies, resulting in significant improvements in writing and math achievement, including network-leading growth in key metrics.



Charter School Board Member Information Form

Note: To be completed individually by each proposed founding charter school board member. Please include a **one-page** resume with this form and sign 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.

School Information	
Name of charter school	Carolina Scholars Academy

Board Member’s Information	
Board Members	Full name: Amanda Jefferson-Lewis
	Home Address: 123 Stonehedge Dr. Henderson, NC 27537
	Business Name & Address:
	Telephone No.: 252-430-4475
	E-mail address: amandajefferson@icloud.com

Board Member Application	
Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?	No: <input checked="" type="checkbox"/> Yes: <input type="checkbox"/>
Educational History	A.A.S. Vance Granville Community College-Early Childhood 2005 B.S University of Mount Olive-Early Childhood 2010 M.S Concordia University-Early Childhood/Curriculum and Instructional-2014 Ed.D National University-Early Childhood 2023
Employment History	Franklin County Schools (Teacher) 2012-current Vance County Schools (Teacher) Head Start (Lead Teacher) 2011-2012 Little People Preschool (Preschool Teacher) 2005-2011
How were you recruited to join this Board of Directors?	Miss Livingston asked me to join her board of directors
Why do you wish to serve on the board of the proposed charter school?	I believe I can be a great access to her board with my expertise in early childhood and education.
How were you recruited to join this Board of Directors?	Asked by Miss Livingston, the founder and president.
Why do you wish to serve on the board of the proposed charter school?	See above.
What is your understanding of the appropriate role of a public charter school board member?	Serve as an advocate for children and public education, communicate a clear vision, monitor student achievement, understand and respond to

	community needs.
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 can be an effective board member.	No previous experience but I can share my knowledge and expertise on early childhood education. I will also be able to provide valuable experience regarding parent communication.
Describe the specific knowledge and experience that you would bring to the board.	My expertise in early childhood education and curriculum and instruction will be an asset to all students at Carolina Scholars Academy.

School Mission and Program

What is your understanding of the school's mission and guiding beliefs?	Our approach fosters peer learning, critical thinking, leadership, and personalized education, ensuring that every child thrives in a dynamic, student-centered environment. This philosophy aligns with our mission to inspire lifelong learners and our vision of preparing students for success in an ever-changing world.
What is your understanding of the school's proposed educational program?	The school will enroll students in grades K-5 in our first year, and will expand by one grade level per year until we serve students in grades K-8.
What do you believe to be the characteristics of a successful school?	A successful school fosters a supportive, inclusive environment with high expectations, effective leadership, strong community partnerships, and a focus on student learning and well-being, while also emphasizing collaboration and communication
How will you know that the school is succeeding (or not) in its mission?	We will know if the school is succeeding by having professional development training and frequent board meetings to discuss the school and its performance.

Governance

<p>Describe the role that the board will play in the school's operation.</p>	<p>The foundation for the school is created by the board members and the staff. We are in charge of overseeing the operational, financial, and academic components.</p>
<p>How will you know if the school is successful at the end of the first year of operation?</p>	<p>We will meet and discuss the operation of the school at the end of the first year. We will discuss the operational, finance, and academic parts of the school.</p>
<p>How will you know at the end of five years of the schools is successful?</p>	<p>By year 5, the staff, academic performance, teacher effectiveness, staff development, parent involvement and assessment data.</p>
<p>What specific steps will the charter school board need to take to ensure that the school is successful?</p>	<p>Follow NCDPI and NHA guidelines to ensure our school is successful. The principal will be held accountable for student performance data and our board will regularly review the school's academic, financial, and operational data.</p>
<p>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?</p>	<p>Have a meeting and discuss what needs to be done and have the best interest of the school and its future.</p>

Certification

I, Amanda Jefferson-Lewis, 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 Scholar Aca. Charter School is true and correct in every respect.

Board Member's Signature

Signature <u>Amanda Jefferson Lewis</u>	Date <u>4/7/25</u>
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**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 and the license validity. Click or tap here to enter text.*

Amanda Jefferson-Lewis, Ed.D

Henderson, NC 27537 | (252) 430-4475 | amandojjefferson@icloud.com

Objective

Dynamic Pre-K Teacher with a proven track record at Franklin County Schools, skilled in implementing play-based learning and differentiated instruction. Adept at fostering a nurturing environment that promotes early literacy and social development. Committed to effective parent communication and student assessment, demonstrating patience and empathy in all interactions.

Skills

- CPR/FA certification
- NC Early Childhood Credentials
- ECERS
- Pre-K regulations/NAEYC Code of Ethics
- Birth-K NC Teaching License
- Child Development/Theorists
- Early Childhood DAP
- NC DCDEE standards/NC Pre-K Standards
- TSG/Gold/Creative Curriculum
- Classroom management/Lesson planning
- Student assessment
- Parent communication
- Early literacy strategies
- Classroom technology
- Collaborative learning/Instructional strategies
- IEP
- Play-based learning
- Patience and empathy
- Early childhood education
- Calm and patient
- Classroom management
- Differentiated instruction

Experience

NC PRE K/TITLE 1 PRE-K TEACHER | 08/2012 - Current

Franklin County Schools - Louisburg, NC

- Planned and implemented lessons using various teaching strategies to meet diverse student needs.
- Participated in professional development activities to stay abreast of current trends in early childhood education.
- Managed classroom materials and resources effectively to maximize instructional time.
- Implemented hands-on, play-based strategies for experiential learning.
- Organized and led activities to promote physical, mental and social development.
- Assessed student progress through observation, documentation, and portfolio review.
- Met with parents and guardians to discuss students' progress and areas requiring improvement.
- Met with parents to discuss child behavior and academic progress.

PRE-K TEACHER | 04/2005 - 08/2011

Little People Preschool - Raleigh, USA

- Created a positive, nurturing classroom environment that encourages children's exploration and curiosity.
- Read stories to children and taught painting, drawing, and crafts.
- Controlled classroom environments with clearly outlined rules and positive reinforcement techniques.
- Established indoor and outdoor safe play environments for toddler-age children.
- Distributed quarterly progress assessments and milestone reports to each parent.

Education

Northcentral University - Ed.d

Early Childhood, 04/2023

Concordia University of Portland - Portland, Oregon | M.S

Early Childhood Education/Curriculum and Instruction, 05/2015

Mount Olive College - RTP | B.S

Early Childhood Education, 08/2010

Vance Granville Community College - Henderson, NC | A.A.S

Early Childhood Education, 05/2005



Charter School Board Member Information Form

*Note: To be completed individually by each proposed founding charter school board member. Please include a **one-page** resume with this form and sign 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.

School Information	
Name of charter school	Carolina Scholars Academy

Board Member’s Information	
Board Members	Full name: Tykayla Livingston
	Home Address: 5488 Hwy 401 N, Louisburg, NC
	Business Name & Address:
	Telephone No.: 252-767-6739
	E-mail address: elitegeniuscharterschool@gmail.com

Board Member Application

Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?	<p style="text-align: center;">No: <input checked="" type="checkbox"/> Yes: <input type="checkbox"/></p>
Educational History	<p>High School Diploma from Penn Foster High School in Kittrell Job Corps. I also went to Kittrell Job Corps to get my medical Assistant Trade Certification. I started my high school February of 2016 and completed June 2016. I received my Medical Assistant certification in September of 2016.</p> <p>Associates Degree in Early Childhood Education- May 2025 Early Childhood Education Administrative Certificate- Dec. 2023 Infant and Toddler Certification- May 2024 Early Childhood Education Credentials- July 2023</p>
Employment History	<p>Work-Based Learning at Kittrell Job Corps- Medical Assistant-Xerox Discovery Point Heritage- Floater leading to 2 year old lead teacher Millbrook Kindercare- 3 year old lead teacher Falls Academy- 4-5 year old lead teacher Childcare Network, Garner- Lead 4 year old teacher, with special needs students as well Great Beginnings Christian Childcare Center- 2 year old lead teacher Laurel Mill Elementary- Kindergarten Instructional Assistant</p>
How were you recruited to join this Board of Directors?	<p>I am Founder and President</p>
Why do you wish to serve on the board of the proposed charter school?	<p>I wish to open Carolina Scholar Academy in Franklin County, NC because I am deeply invested in this community— not just as a resident but as a parent and educator who witnessed firsthand the challenges our students and teachers face. Every day, I see the gaps in support, resources, and opportunities that hinder our children’s growth. I know</p>

	<p>what our teachers want to do for their students, but I also see the limitations they face. Our children deserve more— more individualized attention, more innovative learning experiences, and more opportunities to thrive beyond the traditional classroom model. Through Carolina Scholars Academy, I want to create a school that prioritizes student success, supports teachers, and empower families by offering a collaborative, inquiry-based, and student-driven education. I am passionate about the children of Franklin County, and I believe this school will provide them with the support, structure, and inspiration they need to become confident, capable, and successful learners.</p>
<p>How were you recruited to join this Board of Directors?</p>	<p>I am Founder and President</p>
<p>Why do you wish to serve on the board of the proposed charter school?</p>	
<p>What is your understanding of the appropriate role of a public charter school board member?</p>	<p>As a public charter school board member you are responsible for the outcome of the school. We set the foundation for the school and then make sure everything aligns with our mission and vision. This includes policies, staff, student and school growth, making sure we are in good standings with our authorizers, etc. We are also the faces of the school so we must carry ourselves accordingly. We have the last say in budgeting, creating or offering programs to support our teachers and students etc. We make sure NHA is doing their jobs as stated in our Service Agreement.</p>
<p>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 can be an effective board member.</p>	<p>I am a dedicated educator, leader, and youth advocate with extensive experience in early childhood education, curriculum development, and instructional leadership. Passionate about creating innovative, student-centered learning environments that foster academic excellence, critical thinking, and personal growth. As a resident and educator in Franklin County, I have firsthand knowledge of the challenges students and teachers face, driving my commitment to transforming education through Carolina Scholars Academy. With an Associates Degree in Early Childhood Education (May 2025) and multiple certifications in early childhood administration, infant and toddler care, and special needs education, I bring a strong foundation in child development, school operations, and leadership. My experience includes leading classrooms across various age groups, developing customized</p>

	<p>curriculum, and working with diverse student populations, including those with special needs. I actively serve on the Board of Directors for Wake Forest Charter Academy and am a member of Down Home and Public School Strong, Franklin County Chapter, where I advocate for improving education and supporting student success. As a reader for Franklin County CAREs Reading Program at Laurel Mill Elementary, I help foster literacy development and a love for learning in young students. Additionally, I volunteer extra time at the school to assist teachers, tutor students, and provide hands-on support for leadership and staff.</p> <p>As a strong advocate for today’s youth and education, I am committed to ensuring that all students have access to high quality learning experiences, individualized support, and opportunities for growth. As the Founder and President of Carolina Scholars Academy, I am dedicated to establishing a progressive, inquiry-based charter school that empowers students, supports teachers, and engages families. My leadership skills, educational expertise, and dedication to equity and innovation will ensure the success of the academy and its mission to inspire lifelong learning and academic achievement.</p>
<p>Describe the specific knowledge and experience that you would bring to the board.</p>	<p>As an experienced early childhood educator and youth advocate, I am committed to transforming education in Franklin County, NC. With a strong foundation in child development, curriculum design, and school leadership, I have dedicated my career to empowering students, supporting teachers, and fostering innovative learning environments. I hold an Associates Degree in Early Childhood Education (May 2025), along with multiple certifications in early childhood administration, infant and toddler care, and educational credentials. My background includes lead teaching roles across various age groups, including experience working with special needs students. I have also gained hands-on experience in medical assisting through the Kittrell Job Corps. As Founder and President of Carolina Scholars Academy, I aim to create a student-driven, inquiry based school that provides the necessary resources, support, and opportunities for children in our community. My vision is to establish a transformative educational model that prioritizes student success, innovative teaching, and holistic development—</p>

	ensuring every child has the foundation to thrive academically and personally.
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School Mission and Program	
<p>What is your understanding of the school’s mission and guiding beliefs?</p>	<p>As an advocate for today’s youth and education, I see that our students are capable of far more than we are currently offering them. However, many of them are not stepping up to the plate because they haven't been taught how to tap into their potential. This is why it’s so important to provide them with the tools, support, and guidance to unlock their true abilities. Through this school, we aim to teach our students how to rise to the occasion, providing them with the opportunities and skills to succeed.</p>
<p>What is your understanding of the school’s proposed educational program?</p>	<p>The educational plan for Carolina Scholars Academy is based on the National Heritage Academies (NHA) curriculum, which emphasizes rigorous academics, character development, and student-driven learning. The curriculum is designed to foster critical thinking, inquiry based learning, and personalized education that caters to the needs of all students. With a focus on project-based learning, technology integration, and social-emotional development, the school aims to prepare students for success in both academic and real-world environments. The plan also includes ongoing teacher development, family engagement, and a commitment to community involvement to ensure every student reaches their full potential.</p>
<p>What do you believe to be the characteristics of a successful school?</p>	<p>A successful school is characterized by a strong, supportive culture, where students feel safe, valued, and motivated to learn. The school promotes social-emotional development, fostering respect, responsibility, and collaboration. It actively engages families and the community, encouraging partnerships that support student growth. Additionally, a successful school provides continuous professional development for teachers, utilizes data-driven instruction, and ensures equitable opportunities for all students to succeed and thrive.</p>

<p>How will you know that the school is succeeding (or not) in its mission?</p>	<p>At Carolina Scholars Academy, we envision a future where every student thrives in a dynamic and engaging educational setting that celebrates diversity, encourages critical thinking, and nurtures individual talents. Through cutting-edge technology, personalized learning, and collaborative projects, we prepare students to excel in a rapidly changing world.</p> <p>Our educational philosophy, “ Children Teach Children, Guided by You” reflects our belief that students learn best through collaboration, inquiry, and mentorship. Teachers act as facilitators, guiding students to explore, question, and support one another in their learning journey. This approach fosters peer learning, critical thinking, leadership, and personalized education, ensuring that every child thrives in a student-centered environment. Our philosophy aligns with our mission to inspire lifelong learners and our vision of preparing students for success in an ever-changing world. Through our commitment to collaboration and student-driven learning, we are confident that Carolina Scholars Academy will empower students to become thoughtful, capable, and responsible global citizens.</p>
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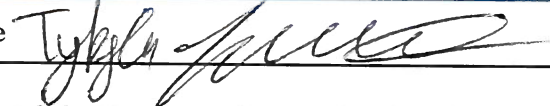
Governance	
<p>Describe the role that the board will play in the school’s operation.</p>	<p>We are a governing board. We are ultimately responsible for the success of Carolina Scholars Academy. We create the foundation for the school and then oversee the operational, financial, and academic component making sure we achieve our mission, vision, and goals for Carolina Scholars Academy.</p>

<p>How will you know if the school is successful at the end of the first year of operation?</p>	<p>I will know the school is successful by meeting our academic, financial, and operational goals that were established at the beginning of the school year. I want to be able to see some growth in our students. I want to meet every child where they are and help them grow to where they need to be. As an educator I understand how important that little growth is to a student. If we encourage that those little achievements are worth something too, they will continue to be more confident and more understanding that their educational journey might not look like their peers, but that doesn't mean they aren't achieving too.</p>
<p>How will you know at the end of five years of the schools is successful?</p>	<p>By Year 5, Carolina Scholars Academy's success will be measured by academic growth, student engagement, teacher effectiveness, parent involvement, school culture, and future readiness. Strong NHA assessment results, high student retention, effective teachers, and active family participation will indicate progress. A positive, student-centered environment where "Children Teach Children, Guided by You" is evident will confirm our mission in action. If students are thriving academically, socially, and in preparation for their futures, we will know our school is successful.</p>
<p>What specific steps will the charter school board need to take to ensure that the school is successful?</p>	<p>Our board will maintain our mission and vision for Carolina Scholars Academy. Will we hold NHA accountable for the operations and academic achievement goals of Carolina Scholars Academy. The board has an independent legal counsel and auditor to provide us with guidance in legal decisions and the state of our school's finances. We will make sure we are compliant with all NCDPI and Office of Charter School guidelines and requirements including in compliance with NC conflict of interest and public records laws. Our principal will provide us with updates on the school's performance.</p>
<p>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?</p>	<p>I will consult with our legal counsel should any conflict of interest ever arise. With the guidance of our legal counsel, we will make the best decisions in the best interest of our students, staff, and families.</p>

Certification

I, TyKayla Livingston, 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 Scholars Academy Charter School is true and correct in every respect.

Board Member's Signature

Signature 	Date <u>April 7, 2025</u>
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**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 and the license validity. Click or tap here to enter text.*

Tykayla Livingston

Louisburg, NC, USA | tlivi5100@gmail.com | +1 252 767 6739

SUMMARY

Dedicated and passionate early childhood educator with over eight years of experience fostering the academic, social, and emotional development of young learners. Skilled in implementing developmentally appropriate practices, diverse teaching strategies, and creating engaging learning environments. Adept at collaborating with families, leveraging observation methods to assess progress, and employing preventive strategies for a positive and supportive classroom atmosphere.

EXPERIENCE

Kindergarten Instructional Assistant & CAREs Reading Program Reader August 2024 – Present, Louisburg, NC **Laurel Mill Elementary**

- Provide instructional support by assisting with lesson implementation, classroom management, and individualized student learning.
- Work closely with students in small groups or one-on-one to reinforce literacy, math, and problem-solving skills.
- Serve as a Reader for the CAREs Reading Program, promoting early literacy and a love for reading among young students.
- Communicate effectively with teachers, staff, and parents to ensure student progress and well-being.

Lead Teacher August 2023 – February 2024, Henderson, NC **Great Beginnings Christian Child Care Center**

- Designed and implemented age-appropriate lesson plans aligned with early childhood education standards.
- Maintained detailed records of student progress through observations, checklists, and anecdotal notes.
- Established strong relationships with families to support children's learning and development at home.

Lead Teacher June 2022 – June 2023, Garner, NC **Childcare Network**

- Developed and executed engaging lesson plans tailored to meet the needs of 3- and 4-year-old students.
- Managed classroom behavior effectively through positive reinforcement and preventive strategies.
- Conducted parent-teacher conferences to discuss student progress and development.

Lead Teacher October 2022 – May 2022, Raleigh, NC **Falls Academy**

- Led classroom instruction for toddler and preschool-aged children, adapting lessons to meet developmental milestones.
- Transitioned between various age groups, supporting different learning needs, including infants and preschoolers.
- Maintained classroom structure and engaged students in hands-on learning experiences.

Two-Year-Old Teacher April 2019 – March 2020, Raleigh, NC **Millbrook Kindercare**

- Developed and executed interactive lessons focusing on language development, social skills, and early math concepts.
- Provided nurturing care, ensuring a safe and stimulating environment for toddlers.
- Fostered early literacy through storytelling, music, and sensory activities.

Lead Teacher March 2018 – December 2018, Wake Forest, NC **Discovery Point Heritage**

- Designed and facilitated engaging curriculum activities for children aged 6 weeks to 4 years.
- Encouraged social interactions and emotional development through play-based learning to address individual child needs and milestones.

EDUCATION AND CERTIFICATIONS

High School Diploma

Kittrell Job Corps Penn Foster • Kittrell, NC • February 2016 – June 2016

Associate's Degree in Early Childhood Education

Vance-Granville Community College • Henderson, NC • May 2023 – Present

Child Development Associate (CDA) Certification

Early Childhood Education • Dec 2023 – Present

Administration Certification

Early Childhood Education • Dec 2023 – Present

Teaching Certification

Substitute Teaching Certification



Charter School Board Member Information Form

Note: To be completed individually by each proposed founding charter school board member. Please include a **one-page** resume with this form and sign 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.

School Information

Name of charter school	Carolina Scholars Academy
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Board Member’s Information

Board Members	Full name: Marla Mills-Wilson
	Home Address: 1100 Birdsong Court, Youngsville, NC 27596
	Business Name & Address:
	Telephone No.: 919-358-6137
	E-mail address: mmillswilson1913@gmail.com

Board Member Application	
Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?	No: <input type="checkbox"/> Yes: <input checked="" type="checkbox"/>
Educational History	Bachelor of Science in Exercise Science: Adult Fitness from University of Tennessee at Chattanooga
Employment History	I have worked doing clinical research in the biotechnology/pharmaceutical industry for over 22 years.
How were you recruited to join this Board of Directors?	Following my time serving on the Envision Science Academy board, I sought out new opportunities to serve on educational boards. I heard about our board President, Tykayla Livingston's efforts to start a new charter school and reached out regarding the opportunity to serve on the board.
Why do you wish to serve on the board of the proposed charter school?	I recognize the need for parents to have another educational choice in the Franklin County area. Our school, with the support services provided by NHA, will be strong academically and operationally, allowing us to meet student needs and serve them well.
How were you recruited to join this Board of Directors?	See above.

<p>Why do you wish to serve on the board of the proposed charter school?</p>	<p>See above.</p>
<p>What is your understanding of the appropriate role of a public charter school board member?</p>	<p>As a board member, it is our responsibility to ensure our students are achieving success compared to area schools – ensuring our goals are met and that our education plan and budget align with the school’s mission. We must exercise appropriate oversight of the school’s budget to ensure resources are used wisely in service of students.</p>
<p>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 can be an effective board member.</p>	<p>As cofounder of Envision Science Academy, I have hands-on experience in what it takes to establish a charter school and get it up and running. I am experienced in the tasks required of efficient and effective board members, and well acquainted with common pitfalls that face new schools.</p>
<p>Describe the specific knowledge and experience that you would bring to the board.</p>	<p>Having been deeply involved with a charter school for 11 years, I know what it takes to get a school open. I have experience successfully guiding a school through difficult times, making tough decisions, interpreting metrics, and figuring out how to work with the school’s operations team to ensure students are learning as they should be. I also have experience ensuring that the school is meeting all the promises made in the charter application.</p>

School Mission and Program

<p>What is your understanding of the school’s mission and guiding beliefs?</p>	<p>Our school’s rigorous curriculum will prepare for students for learning in high school and beyond. Our school’s moral focus curriculum will empower students to be responsible citizens.</p>
<p>What is your understanding of the school’s proposed educational program?</p>	<p>Carolina Scholars Academy will use National Heritage Academies’ rigorous, evidence-based educational program. This program will meet students where they are in order to ensure they are prepared for high school, college, and beyond.</p>

<p>What do you believe to be the characteristics of a successful school?</p>	<p>A successful school meets goals that it has set. Student performance will be a key indicator of whether our school is successful. Measures of where our school stands compared to other area schools (and schools across the state) will also show whether we are a successful school.</p>
<p>How will you know that the school is succeeding (or not) in its mission?</p>	<p>We will know our school is succeeding in its mission if students are meeting required metrics and graduating prepared for high school, college, and beyond. We will also know whether our school is succeeding in its mission by looking at the demand for the school.</p>

Governance

<p>Describe the role that the board will play in the school's operation.</p>	<p>Our board is a governing board. We will work together to ensure we produce a successful school and will regularly review reports on academic, operational, and financial data. We will delegate day-to-day operations to NHA and hold our management partner to high standards of accountability.</p>
<p>How will you know if the school is successful at the end of the first year of operation?</p>	<p>We will know our school is successful at the end of the first year of operation by revisiting our application to see if our school has met its initially set goals.</p> <p>We will also see whether we are successful by reviewing metrics and assessing whether staff is getting what they need. Our parent and staff surveys will provide insight into whether our school is operating successfully.</p>
<p>How will you know at the end of five years of the schools is successful?</p>	<p>Each year, our board will collaborate with the operational team to set goals. Revisiting annual and long-term goals, reviewing metrics, and evaluating financial and operational reports will help our board understand if we are on track to be successful according to what was proposed in our original application. Curricular success will also indicate whether our school is successful.</p>

<p>What specific steps will the charter school board need to take to ensure that the school is successful?</p>	<p>Our board will need to regularly review and ensure we understand all financial aspects of the school, as this is a critical area in a new school's success. Our board must be made of members with diverse backgrounds, working together, and holding regular meetings to review testing and other academic metric data. We must also review parent and staff satisfaction survey feedback and look at our enrollment and community partnerships to ensure our school is accomplishing what we set out to do.</p>
<p>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?</p>	<p>If the member acting unethically was someone other than the board president, I would discuss the issue with our board president. If necessary, I would escalate the issue to our board's legal counsel. In all cases, including if the member acting unethically was the board president, I would act in accordance with our board's bylaws and policies.</p>

Certification

I, Marla Mills-Wilson, 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 Scholars Academy Charter School is true and correct in every respect.

Board Member's Signature

<p>Signature <u>Marla Mills-Wilson</u></p>	<p>Date <u>07 Apr 25.</u></p>
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**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 and the license validity. Click or tap here to enter text.*

MARLA MILLS-WILSON

919.358.6137
mmillswilson1913@gmail.com

PROFESSIONAL EXPERIENCE (PAST 10 YEARS)

- 4D Molecular Therapeutics**, Emeryville, CA (remote) 8/2024- present
Consultant: Sr Consultant
Therapeutic: Ophthalmic Gene Therapy: Phase I/II age-related macular degeneration (wet AMD), phase II diabetic macular edema.
- 1099 Consultant: EmitBio, Inc**, Morrisville, NC 5/2023--01/2025
Head of Clinical Operations
Therapeutics: COVID-19 (Medical Device, Phase IIa)
- GALECTIN THERAPEUTICS**, Norcross, GA (remote) 5/2020-4/2023
Executive Director/Head of Clinical Operations 6/2021-4/2023
- Director, Clinical Operations** 5/2020-6/2021
Therapeutics: Global Ph 2b/3 Cirrhosis in NASH Patients, Ph I Hepatic Impairment, Phase I head and neck cancer (investigator led), Phase II head and neck cancer.
- 1099 Consultant: CymaBay Therapeutics** 4/2019-1/2020 and 5/2020- 8/2021
Sr Clinical Operations Consultant
Therapeutics: Phase I Renal Impairment, Phase I Hepatic Impairment, Phase I Drug-Drug Interaction; Global Phase IIb NASH, Global Phase IIb PBC, Global Phase III PBC
- 1099 Consultant: Intercept Pharmaceuticals** 4/2017-3/2019
Senior Clinical Operations Consultant
Therapeutic: Global Phase III NASH
- INNO CLINICAL OUTCOMES, LLC**, Morrisville, NC 5/2016-3/2017
Director, Clinical Operations
Therapeutics: Rare Disease: Phase III Tardive Dyskinesia; Phase II Lewy Body Dementia; Phase III Parkinson's Disease-Induced Dementia, Alzheimer's
- NOVELLA CLINICAL**, Morrisville, NC 10/2013-4/2016
Senior Manager, Clinical Operations
Therapeutics: General Med/Device: Balloon Sinus Dilation (device), COPD, Cystic Fibrosis, Pediatric Pain with PK Component, Sickle Cell, Topical Thrombin, Epidermolysis Bullosa. Oncology: Phase III Glioblastoma. Phase II Breast, Gastric, Solid Tumors
- JUBILANT CLINSYS, INC.**, Raleigh, NC 10/2008-8/2013
Associate Director, Clinical Operations, 2/2012-8/2013
- Senior CRA Manager* 10/2008-2/2012
Therapeutics: Phase I AMD, Phase II Metastatic Sarcoma, Phase III Acne Study (2), Phase III Otitis Media

EDUCATION

UNIVERSITY OF TENNESSEE, Chattanooga, TN
Bachelor of Science, Exercise Science: Adult Fitness (cardiology)

OTHER

Charter School Co- Founder: Envision Science Academy, Kindergarten-8th grade Wake Forest, NC. Founded: 2013



Charter School Board Member Information Form

*Note: To be completed individually by each proposed founding charter school board member. Please include a **one-page** resume with this form and sign 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.

School Information	
Name of charter school	Carolina Scholars Academy

Board Member’s Information	
Board Members	Full name: Unique Traynham
	Home Address: 12241 Oakwood View Dr APT 305, Raleigh NC 27614
	Business Name & Address:
	Telephone No.: 919-995-2160
	E-mail address: Utray52@gmail.com

Board Member Application	
Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?	No: <input type="checkbox"/> Yes: <input checked="" type="checkbox"/>
Educational History	Bachelor of Science, Sport Management- Livingstone College 2013 Master of Public Administration- North Carolina Central University 2023
Employment History	<p>WSP USA Services, INC – Housing Inspection Contractor United States October 2024 – Present</p> <p>Teepa Snow’s Positive Approach to Care, Hillsborough, NC <i>Community Engagement Coordinator</i> March 2024 – September 2024</p> <p>Raleigh Police Department, Raleigh, NC <i>Senior Officer</i> - October 2016 – October 2023</p> <p>City of Raleigh, Parks & Recreation – Teen Outreach Program <i>Director</i> Raleigh, NC July 2015 – September 2016</p>

How were you recruited to join this Board of Directors?	Interviewed with Tykayla Livingston who shared her vision for the youth.
Why do you wish to serve on the board of the proposed charter school?	I wish to serve on the board as an opportunity to provide for the community a school that stakeholders in the community can look to for resources, and provide the community with an education that can last for a lifetime.
How were you recruited to join this Board of Directors?	Interviewed with Tykayla Livingston who shared her vision for the youth.
Why do you wish to serve on the board of the proposed charter school?	I wish to serve on the board as an opportunity to provide for the community a school that stakeholders in the community can look to for resources, and provide the community with an education that can last for a lifetime.
What is your understanding of the appropriate role of a public charter school board member?	To uphold the vision and mission of the school, provide governance such as setting, maintaining and updating policies, financial oversight, accountability and compliance.
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 can be an effective board member.	My prior board service experience was with Loaves and Fishes Ministries, where financial oversight was my role. I currently serve as a board member with Noble Aspirations, which is a non profit organization that provides scholarships to the youth through community service. I believe I can be an effective board member based on experience and the commitment that I bring in providing opportunities for the youth.
Describe the specific knowledge and experience that you would bring to the board.	Specific knowledge I bring is community engagement, public safety experience and public policy. These are lived experiences in the workplace along with educational experience.

School Mission and Program

<p>What is your understanding of the school’s mission and guiding beliefs?</p>	<p>The school's mission is to inspire a lifelong love of learning through an innovative, inquiry-driven curriculum that blends business management, entrepreneurship, and technology. Where we can empower students to explore, discover, and reach their full potential, equipping them with the skills and knowledge to become future business leaders and responsible global citizens.</p>
<p>What is your understanding of the school’s proposed educational program?</p>	<p>The proposed educational program is one that is based on NHA curriculum, data driven instruction, technology integration, with a strong emphasis on ELA, Math , Science, Social Studies. While focusing on integrating character education that fosters a positive, values driven environment.</p>
<p>What do you believe to be the characteristics of a successful school?</p>	<p>A successful school fosters a culture of excellence by providing strong leadership, high-quality teaching, and a rigorous, student-centered curriculum that promotes critical thinking and real-world application. It creates a positive, inclusive environment where students feel safe, valued, and empowered to achieve their full potential. High expectations and accountability drive continuous improvement, while strong family and community partnerships enhance student success. Through a commitment to innovation, character development, and holistic support, a successful school prepares students for academic achievement, future careers, and responsible global citizenship.</p>
<p>How will you know that the school is succeeding (or not) in its mission?</p>	<p>Factors to look at to determine if a school is succeeding is attendance rates, and test scores. Ultimately the goal is for individual success for each student.</p>

<p>Governance</p>	
<p>Describe the role that the board will play in the school’s operation.</p>	<p>The board of directors will serve as the governing body of the school, ensuring that it fulfills its mission, maintains academic and financial accountability, and operates in compliance with state and federal regulations. While the board will provide strategic oversight and governance, it will not be involved in the day-to-day management of the school, which is the responsibility of the school leadership team.</p>

<p>How will you know if the school is successful at the end of the first year of operation?</p>	<p>The success of the school at the end of its first year of operation will be determined by a combination of academic performance, operational effectiveness, student and family engagement, and overall alignment with the school's mission.</p>
<p>How will you know at the end of five years of the schools is successful?</p>	<p>The success of the school at the end of the first 5 years of operation would be similar to the yearly evaluation, but this would include graduation rates along with enrollment increase or decrease determination. I would also look at hosting a public forum to speak with the community about possible expansion of K-5 to K-8 or K-12. The responses received would indicate if public perception was in good standing.</p>
<p>What specific steps will the charter school board need to take to ensure that the school is successful?</p>	<p>The board must set long-term strategic goals, regularly review progress, and monitor academic achievement, financial health, and operational effectiveness. Financial oversight is critical, with the board approving and overseeing the school's budget, ensuring compliance with regulations, and developing fundraising strategies for sustainability.</p> <p>The board must hire and support strong school leadership, providing clear expectations and fostering professional development for faculty and staff. Monitoring student achievement and using data to guide instructional decisions will ensure academic success. Additionally, the board is responsible for ensuring legal and regulatory compliance, promoting a safe and inclusive environment, and fostering family and community engagement through effective communication and partnerships.</p> <p>Data-driven decision-making is essential for assessing the effectiveness of the school's curriculum and operational strategies, while also evaluating the board's own performance. Long-term sustainability will be achieved through strategic planning, anticipating challenges, and ensuring charter renewal. By fulfilling these responsibilities, the board can ensure the school remains mission-driven, financially sound, and academically successful.</p>

<p>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?</p>	<p>When making decisions that could affect the youth, I believe ethical decision making is the only option. One wrong decision has the power to alter the future of a youth, which I will not stand by and allow. Any decision made should be made with the interest of the school and youth in mind, and in any instance where this does not happen an emergency meeting shall take place where those members should be relieved of their duty pending investigation. At this point the decision shall be made to permanently remove those individuals with due notice.</p>

<p style="text-align: center;">Certification</p>	
<p>I, <u>UNIQUE TRAYHAM</u>, 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 <u>CAROLINA SCHOLARS</u> Charter School is true and correct in every respect.</p>	

<p style="text-align: center;">Board Member's Signature</p>	
<p>Signature </p>	<p>Date <u>4-7-2025</u></p>

**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 and the license validity. [Click or tap here to enter text.](#)*

Unique Traynham

He/Him · [LinkedIn.com/in/unique-traynham](https://www.linkedin.com/in/unique-traynham)

12241 Oakwood View Dr
Raleigh, NC 27614
(919) 995-2160
Utray52@gmail.com

EXPERIENCE

WSP USA Services, INC, United States — *Housing Inspector (Contract)*

October 2024 - present

Meeting with disaster survivors to assess damages and verify required information (ownership, residency, etc.) ,Conducting damage evaluations according to FEMA guidelines ,Department of Homeland Security Clearance

Teepa Snow’s Positive Approach to Care, Hillsborough NC — *Community Engagement Coordinator (Contract)*

March 2024 - September 2024

Managed partnerships with key stakeholders, including healthcare leaders, nonprofit organizations, and public sector partners, to foster collaboration and increase the reach and impact of care programs.

Raleigh Police Department –, Raleigh NC — *Senior Officer*

October 2016 - October 2023

Provided leadership in crisis management situations, ensuring effective communication and rapid response to emergent challenges. Served on the City of Raleigh’s Diversity, Equity, and Inclusion (DEI) team, driving policy changes that supported inclusive, community-focused policing efforts.

EDUCATION

North Carolina Central University – Durham, NC Master of Public Administration, Magna Cum Laude January 2022 – August 2023

GPA: 3.8/4.0

Livingstone College – Salisbury, NC Bachelor of Science, Sports Management August 2009 – December 2013

Community Service

Boy and Girls Club, Volunteer (Current)

Loaves and Finish Ministries, Procurement (2015-16)

Noble Aspirations, Youth Leadership (Current)

SKILLS

Customer Relations Management

Emergency Management

Strategic Planning

Public Speaking

Investigations

AWARDS

Livingstone College 40 Under 40

4X Letters of Commendation for Outstanding Service to the City Of Raleigh.

Organizational Affiliations

Omega Psi Phi Fraternity Inc.

Pi Alpha Alpha, Global Honor Society for Public Affairs and Administration

North Carolina City and County Management Association



Appendix F: Federal Documentation of Tax-Exempt Status

Carolina Scholars Academy

Carolina Scholars Academy will seek tax-exempt status from the Internal Revenue Service. We expect to secure this status within 24 months of the date the charter application receives full approval.



Appendix A4.1: Executed or Draft Management Contract

Carolina Scholars Academy

SERVICES AGREEMENT

THIS SERVICES AGREEMENT (“**Agreement**”) by and between National Heritage Academies, Inc., a Michigan corporation (“**NHA**”), and Carolina Scholars Academy, a North Carolina non-profit corporation (the “**School**”) is executed as of the ___ day of _____ 201_ and shall become effective as of the Effective Date (as defined in Article II(A) below). For purposes of this Agreement, NHA and the School shall be referred to collectively as the “**Parties.**”

RECITALS

WHEREAS, the School is applying for a Charter from the North Carolina State Board of Education (the “**Authorizer**”) to operate a public charter school pursuant to N.C. Gen. Stat. § 115C-218 *et seq.* (the “**Authorizing Law**”); and

WHEREAS, the Parties desire to work together to promote educational excellence and innovation based on NHA’s school design, comprehensive educational program and management principles; and

WHEREAS, the Parties desire to set forth the terms and conditions of such a relationship in this Agreement;

NOW, THEREFORE, for good and valuable consideration, including the mutual promise and benefits contained in this Agreement, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

ARTICLE I

CONTRACTING RELATIONSHIP

A. Services. Subject to the terms and conditions of this Agreement, and as permitted by applicable law, the School hereby contracts with NHA for the provision during the Term of certain educational, business administration, facility, and management services, including without limitation, all labor, equipment, and materials necessary for the provision of the same, as set forth herein (collectively, the “**Services**”).

B. Charter. This Agreement shall: (i) be subject to and comply with the terms and conditions of the Charter and the School’s Charter Application (collectively, the “**Charter**”); and (ii) not be construed to interfere with the constitutional, statutory, or fiduciary duties of the School’s Board of Directors (the “**Board**”). In the event of a conflict between any term or condition of this Agreement and any term or condition of the Charter, the term or condition of the Charter shall govern.

C. Independent Contractor. NHA shall provide the Services as an independent contractor, and not as an employee, partner, agent, or associate of the School. This independent contractor relationship shall extend to the officers, directors, employees, and representatives of

NHA. Consistent with the status of an independent contractor, NHA reserves to itself the right to designate the means and methods of accomplishing the objectives and purposes of this Agreement consistent with Authorizing Law and the Charter. The relationship between the Parties is based solely on the terms and conditions of this Agreement, and the terms and conditions of any other written agreement between the Parties.

D. Designations and Appointments.

1. NHA, including its directors, officers, and employees are hereby designated as “other School Officials having a legitimate educational interest in education records” for purposes of the Family Educational Right and Privacy Act, 20 U.S.C. §1232g *et seq.* (FERPA).

2. NHA, its directors, officers, and employees may be designated by the School for other purposes by a written resolution of the Board.

ARTICLE II

TERM & TERMINATION

A. Effective Date; Term. This term of this Agreement shall commence on the Effective Date, and unless terminated as set forth herein, shall continue until the termination or expiration of the Charter currently in effect, inclusive of any Charter reauthorization or renewal periods thereof (the “**Term**”). “Effective Date” means the date that the Authorizer approves and issues a fully executed Charter to the School under the policies of the Authorizer and applicable North Carolina law. The parties have executed this Agreement in anticipation that it will automatically spring into existence and become effective on the Effective Date without any further action required from either party. For clarity, the parties shall have no rights, or any obligations to one another whatsoever, under this Agreement unless and until the Effective Date. In the event that the School fails to have a Charter issued by the Authorizer for any reason, this Agreement will automatically terminate without any rights or obligations of either party under this Agreement having ever come into effect. The parties acknowledge that the Authorizer, as part of any reauthorization or renewal, may require that the School and NHA submit an amended or restated Agreement for review by the Authorizer. Assuming that the Effective Date comes to pass, and the Term of this Agreement commences, the first school year under the Term of this Agreement shall commence July 1, 201_ to June 30, 201_, and each school year during the Term thereafter shall commence on July 1 and end on June 30 of the following year.

B. Termination.

1. By NHA. NHA may terminate this Agreement prior to the end of the Term if the Board fails to remedy a material breach of this Agreement within thirty (30) days after receiving a notice from NHA of such breach. For purposes of this Subsection, a material breach (which for the sake of clarity is a default hereunder) includes, but is not limited to: (i) NHA's failure to timely receive any compensation or reimbursement required by this Agreement; or (ii) a suspension, revocation, or non-renewal of the Charter.

2. By the School. The School may terminate this Agreement prior to the end of the Term if NHA fails to remedy a material breach of this Agreement within (30) days after receiving notice from the School of such breach. For purposes of this Subsection, a material breach (which for the sake of clarity is a default hereunder) includes, but is not limited to: (i) NHA's failure to account for expenditures or pay operating costs pursuant to the Budget (as defined below); (ii) NHA's failure to follow policies, procedures, rules, regulations or curriculum adopted by the Board, provided they do not violate the Charter, applicable law, or this Agreement; (iii) a receipt by the Board of an unsatisfactory report from NHA or an independent education consultant retained by the Board regarding the Services or the School's performance, provided the unsatisfactory performance cannot be adequately corrected or explained; (iv) a determination that this Agreement or its implementation would serve as grounds for suspension, revocation, or non-renewal of the Charter; (v) a determination that this Agreement or its implementation would jeopardize material tax exemptions of the School or its non-profit status; or (vi) any action or inaction by NHA that places the Charter in jeopardy of termination, suspension or revocation.

3. By Either Party. Either party may terminate this Agreement prior to the end of the Term, with or without cause, by providing the other party with at least ninety (90) days' prior written notice.

4. If this Agreement is terminated prior to the end of the Term, and unless otherwise agreed by the Parties, such termination will not become effective until the end of the then-current school year.

C. Effect of Termination. Upon the effective date of termination or expiration of this Agreement:

1. NHA shall have the right to remove from the School any equipment or other assets owned or leased by NHA;

2. The School shall pay or reimburse NHA through the Fee (as defined below) for the prepaid portion of any expenses or liabilities incurred by NHA pursuant to the Budget as of the date of such termination or expiration, provided NHA supplies the School with documentation of all such expenses and liabilities;

3. NHA may agree, in its sole discretion, to assist the School for a reasonable amount of time, not to exceed ninety (90) days, and for a reasonable fee, with the School's transition to another administrative, managerial, or services arrangement;

4. NHA shall, if applicable, reasonably assist the School in the execution of a closure and dissolution plan and cooperate in the closure and dissolution process, including without limitation, in any audits and court or other proceedings related thereto; and

5. The party to whom Confidential Information (as defined below) has been disclosed shall, upon request and at the direction of the disclosing party: (i) return such Confidential Information within thirty (30) days, including any copies thereof, and cease its use; or (ii) destroy such Confidential Information and certify such destruction to the disclosing party, except for a single copy thereof which may be retained for the sole purpose of determining the scope of any obligations incurred under this Agreement, and except where disclosure or retention is required by applicable law.

ARTICLE III

OBLIGATIONS OF NHA

A. Manager at Risk. NHA shall be responsible and accountable to the Board for providing the Services during the Term. During the Term, NHA shall provide the Services regardless of whether actual revenue meets the level projected in the Budget, and NHA hereby assumes the risk of funding shortfalls during the Term. Notwithstanding the foregoing, NHA shall not be required to expend funds on Services in excess of the amount set forth in the Budget.

B. Comprehensive Educational Program. The School has determined to adopt NHA's proprietary educational and academic programs and goals, as set forth in the Charter (the "**Educational Program**"). Subject to the oversight of the Board, during the Term NHA shall implement and administer the Educational Program. In the event that NHA reasonably determines that it is necessary or advisable to make material changes to the Educational Program, NHA shall inform the Board of the proposed changes and obtain the Board's approval before making such changes, as well as the Authorizer's approval if required by the Charter or applicable law. The Parties acknowledge and agree that an essential principle of the Educational Program is its flexibility, adaptability and capacity to change in the interest of continuous improvement and efficiency. Not less than annually or as reasonably requested by the Board during the Term, NHA shall provide the Board with a report detailing progress made on each of the educational goals set forth in the Educational Program. The school year calendar and the school day schedule shall be approved by the Board as required under the Charter.

C. All Children Welcome. NHA places a high value on diversity, and the School shall welcome students of all races, ethnicity, religion, gender and economic backgrounds.

D. Services to Students with Disabilities. NHA welcomes students with disabilities at the School. NHA shall provide special education and related services, in conformity with the requirements of applicable law, to students who attend the School.

E. Educational and Administrative Services. Subject to the oversight of the Board, during the Term, NHA shall implement operational practices and procedures that are consistent with Board policy, the Charter and applicable law. Such practices and procedures shall include, but are not limited to:

1. Student recruitment and student admissions.
2. Student assessments, including testing, promotion, and retention.
3. The acquisition of instructional materials, equipment and supplies, and the administration of any and all extra-curricular and co-curricular activities and programs included in the Budget.
4. Employment of personnel working at the School and management of all personnel functions, as set forth herein.
5. All aspects of the School's business administration.
6. All aspects of the School's accounting operation, including general ledger management, financial reporting, payroll, employee benefits and payroll tax compliance.
7. All aspects of food services.
8. All aspects of facilities administration and maintenance.
9. Student behavior management and discipline.

F. Location of Services. Other than instruction, and unless prohibited by the Charter or applicable law, NHA may provide the Services, including but not limited to, purchasing, professional development and administrative services, off-site.

G. Subcontracts. NHA reserves the right to subcontract any and all aspects of the Services. NHA shall not subcontract the oversight of the Educational Program, except as specifically permitted in this Agreement or with prior written approval of the Board. Notwithstanding the foregoing, the Board specifically acknowledges and agrees that from time to time NHA may use third parties or independent contractors to assist in the creation and development of Educational Materials (as defined below) that may be used as a part of the Educational Program.

H. Pupil Performance Standards and Evaluation. NHA shall implement pupil performance evaluations that permit evaluation of the academic progress of each School student. NHA shall utilize assessment strategies required by the Charter and applicable law. The Board and NHA shall cooperate in good faith to identify academic goals and methods to assess such

academic performance. NHA shall provide the Board with timely reports regarding student performance.

I. Unusual Events. NHA shall timely notify the Board and the Administrator (as defined below) during the Term of any anticipated or known material: (i) health or safety issues, including all mandatory reporting required by applicable law; (ii) labor, employee or funding issues; or (iii) other issues that may reasonably and adversely impact the School's ability to comply with the Charter, applicable law or this Agreement.

J. School Records. The financial and education records pertaining to the School (collectively, the "**School Records**"), are property of the School. Except as may be prohibited or limited by the Charter or applicable law, the School Records shall be available to the Board and the Authorizer for their review, and are subject to inspection and copying to the same extent that records of public schools are subject to inspection and copying pursuant to applicable law. All School Records shall be physically or electronically available upon request at the School's physical facility. NHA agrees to comply with the terms of the Charter regarding information to be made available to the School.

K. Facility. NHA shall use reasonable efforts to secure a facility to be leased or otherwise provided to the School on terms mutually agreeable to NHA and the Board. Obligations of the Board created under the terms of such lease are to be fulfilled by NHA unless otherwise agreed to in writing by NHA and the Board. The facility shall comply with the requirements of the Charter and applicable law. NHA shall also use reasonable efforts to cause the facility to be furnished with equipment and technology as is reasonably necessary to implement the Educational Program.

L. Legal Compliance. NHA will implement and enforce rules, regulations and procedures applicable to the School that are consistent with adopted Board policy, if any, and the Educational Program in accordance with the Charter and applicable law, including without limitation, rules, regulations, and policies regarding non-discrimination, discipline, special education, confidentiality and access to records.

M. Rules and Procedures. NHA will recommend to the Board reasonable rules, regulations, policies and/or procedures applicable to the School. The Board hereby authorizes and directs NHA to enforce such rules, regulations and procedures consistent with Board policy.

N. Assistance to the Board. NHA shall cooperate with the Board and, to the extent consistent with applicable law, timely furnish the Board with all documents and information necessary for the Board to properly perform its responsibilities under this Agreement.

ARTICLE IV

OBLIGATIONS OF THE BOARD

A. Board Policies. The Board shall be responsible for the fiscal and academic policies of the School. The Board shall exercise good faith in considering the recommendations

of NHA, including but not limited to, NHA's recommendations regarding policies, rules, regulations and the Budget (as defined below).

B. Assistance to NHA. The Board shall cooperate with NHA and, to the extent consistent with applicable law, timely furnish NHA all documents and information necessary for NHA to properly perform its responsibilities under this Agreement during the Term.

C. Unusual Events. The Board shall timely notify NHA, during the Term, of any anticipated or known material: (i) health or safety issues; (ii) labor, employee or funding issues; or (iii) other issues that may reasonably and adversely impact NHA's ability to comply with the Charter, applicable law, or this Agreement.

D. Office Space. The Board shall provide NHA with suitable office space at the School, provided the requested space is: (i) available and can be provided without materially prejudicing the Educational Program; and (ii) used only for activities related to the School. The space shall be provided at no cost to NHA.

E. Retained Authority. The Board shall retain the authority to adopt reasonable policies in accordance with applicable law relative to anything necessary for the proper establishment, maintenance, management, and operation of the School.

ARTICLE V

INTELLECTUAL PROPERTY

A. Definitions.

1. **“Educational Materials”** means all curriculum, print and electronic textbooks, instructional materials, lesson plans, teacher guides, workbooks, tests, and other curriculum-related materials licensed, developed or otherwise owned by the School or NHA.

2. **“Confidential Information”** means any confidential and non-public trade, technical or business knowledge, information and materials regarding the School or NHA (or their respective affiliates), which is given by one party to the other, or any of their respective representatives, in any form, whether printed, written, oral, visual, electronic or in any other media or manner. Confidential Information includes, but is not limited to, research, operations and procedures, financial projections, pricing, sales, expansion plans and strategies, services data, trade secrets and other intellectual property, or the results of any mediation or private adjudication, as well as information with respect to each party's or its affiliates' plans for market expansion, except for information which a party can show by contemporaneous written records was developed or formulated independently of work or services performed for, or in connection with performance of, this Agreement. Notwithstanding the foregoing, the disclosure of the other party's Confidential Information as required to be disclosed by law, rule or regulation or by reason of subpoena, court order or government action shall not constitute a breach of this Agreement; however, in such event the party required to disclose such information will reasonably cooperate with the party whose information is required to be disclosed in order to

obtain a protective order applicable to such disclosure. All Confidential Information will remain the sole property of the party disclosing such information or data.

B. School Materials. The School shall own all right, title and interest in and to Educational Materials that are: (i) licensed or owned by the School as of the Effective Date; or (ii) licensed, developed, characterized, conceived, derived, generated, identified, or otherwise made by the School during the Term, provided such materials do not reference the NHA Materials (as defined below), or incorporate any Confidential Information of NHA (collectively, the “**School Materials**”). The School Materials shall include all intellectual property rights associated therewith.

C. NHA Materials. NHA shall own all right, title and interest in and to Educational Materials that are: (i) licensed or owned by NHA as of the Effective Date; (ii) licensed, developed, characterized, conceived, derived, generated, identified, or otherwise made by NHA during the Term, provided such materials do not reference School Materials or incorporate any Confidential Information of the School; and (iii) any and all Educational Materials and non-curriculum materials provided to the School by NHA relating to the Educational Program, including all changes and derivatives thereof (collectively, the “**NHA Materials**”).

D. Derivative Works. The Parties acknowledge that to the extent any Educational Materials created by the School are derivative of the NHA Materials, use of such derivative materials during the Term is subject to the license granted herein, and the license to use such derivative materials shall cease as of the date of expiration or termination of this Agreement.

E. No Transfer or Sale. The School acknowledges and agrees that NHA is not transferring or selling, and the School is not receiving, purchasing or acquiring, any intellectual property or proprietary rights in or to the NHA Materials.

F. Licenses. NHA hereby grants the School a non-exclusive, non-transferable license (without the right to sublicense) to use the NHA Materials, and any Educational Materials created by the School which are derivative of the NHA Materials, solely in furtherance of the Educational Program during the Term, including without limitation, the right to reproduce, publicly display, distribute and create derivative works of the same, in hard copy format or electronically, within the United States. The School represents and warrants that during the Term, and following the expiration or termination of this Agreement, the School will not exploit or assist any third party to exploit any of the NHA Materials for commercial purposes. Subject to applicable law, the School grants NHA a non-exclusive, irrevocable, worldwide, assignable right to use, distribute, modify and display the School Materials, solely for educational purposes for the School, in any and all media now known or hereafter developed.

G. NHA Marks. During the Term, NHA grants the School a non-exclusive, revocable, non-transferable license (without the right to sublicense) to use NHA’s trade name(s) and NHA’s trademark(s) (the “**NHA Marks**”) solely for the purposes of promoting and advertising the School. NHA shall have the opportunity to review and approve all artwork, copy or other materials utilizing the NHA Marks prior to any production or distribution thereof. All uses of the NHA Marks require NHA’s prior written permission. The School shall acquire no

rights in or to the NHA Marks, and all goodwill associated with the NHA Marks shall inure to the benefit of and remain with NHA. Upon expiration or termination of this Agreement, the School shall immediately discontinue use of the NHA Marks and shall remove the NHA Marks from its locations, vehicles, websites, telephone directory listings and all other written or electronic promotional materials.

H. Assignment. Each party shall, and hereby does assign to the other, with full title guarantee and without additional compensation, such right, title and interest in and to any intellectual property as is necessary to fully affect the ownership provisions set out herein, and any accrued rights of action in respect thereof. Each party shall, if so requested by the other, execute all such documents and do all such other acts and things as may be reasonably required to comply with this Agreement to vest in the appropriate party all rights in the relevant intellectual property and shall procure execution by any named inventor of all such documents as may reasonably be required by the other party in connection with any related patent application.

ARTICLE VI

SOLICITATION AND USE OF PRIVATE FUNDS

NHA shall seek the Board's approval prior to soliciting any non-governmental grants, donations or contributions on behalf of the School. Any such funds received shall be used solely in accordance with the purpose for which they were solicited, applicable donor restrictions, or as otherwise approved by the Board. Subject to applicable donor restrictions, the Board shall determine the allocation of any such funds subject to this Article that remain unexpended following completion of the project or purpose for which they were originally designated.

ARTICLE VII

FINANCIAL ARRANGEMENTS

A. Revenues. Except as provided herein, all monies received by the School during the Term shall be deposited in the School's depository account within three (3) business days with a financial institution acceptable to the Board; provided, however, that upon receipt of a notice from NHA, the School shall pay all such funds owing under this Agreement directly to the account or party specified in such notice. The signatories on the School depository account shall solely be Board members or properly designated Board agents (if any). Interest income earned on the School's depository account shall accrue to the School. Except as specifically excluded by this Agreement, the term "**Revenues**" shall include all funds received by or on behalf of the School, including but not limited to:

1. Funding for public school students enrolled at the School.
2. Special education funding provided by the federal and/or state government that is directly allocable to special education students enrolled at the School.

3. Academically or intellectually gifted funding provided by the federal and/or state government that is directly allocable to academically or intellectually gifted students enrolled at the School.

4. At-risk funding provided by the federal and/or state government that is directly allocable to at-risk students enrolled at the School.

5. Funding provided by the federal and/or state government that is directly allocable to students enrolled at the School with limited English proficiency.

6. All other federal and/or state grant sources, including, but not limited to, Title I and any start-up funding allocable to the School.

7. All other grants and donations received by the School to support or carry out programs at the School (except to the extent NHA is not required or involved in soliciting, administering or managing the contribution and/or donation, in which case such funds shall be deposited in the Board Spending Account (as defined below)).

8. Fees charged to students as permitted by law for extra services provided by NHA as approved by the Board.

The expenditure of any Revenues received from governmental entities shall be consistent with all applicable regulations and policies. The expenditure of any Revenues received from non-governmental grants, contributions and donations shall be made consistent with the provisions of Article VI.

B. Budget. NHA shall provide the Board with an annual proposed Budget prepared and maintained in accordance with the Charter and applicable law (the “**Budget**”). For the School’s first school year, the Budget shall be submitted prior to the beginning of the school year. Thereafter, the Budget shall be submitted to the Board prior to June 1 for the next school year.

C. Review and Approval of Budget. The Board shall be responsible for reviewing and approving the Budget in accordance with the Charter and applicable law. At the direction of either NHA or the Board, with the approval of the Board, the Budget shall be amended from time to time as necessary.

D. Board Spending Account. Notwithstanding any other provision of this Agreement to the contrary, each school year during the Term, NHA shall allocate to an account controlled by the Board an amount equal to the lesser of: (i) 2% of state per pupil aid reflected in the Budget for that respective school year, or (ii) \$35,000 (the “**Board Spending Account**”). The aforesaid amount shall be deposited by NHA into the Board Spending Account pro-rata during the course of the School’s school year as Revenues are received. All funds in the Board Spending Account are the property of the School and may be used by the School at the discretion of the Board. Funds in the Board Spending Account that are not spent by the School during the

school year shall carry over annually. Items purchased by NHA for the School and paid for by the School with funds from the Board Spending Account, such as non-proprietary instructional and/or curriculum materials, books, supplies and equipment, shall be the property of the School. The property of the School excludes items leased, financed or purchased by NHA with the Fee (as defined below). NHA agrees not to add any fees or charges to the cost of equipment, materials or supplies purchased by NHA on behalf of the School with funds from the Board Spending Account. NHA, in making such purchases for the School pursuant to this subsection, shall comply with applicable law, as if the School were making such purchases itself from a third party, and shall provide the Board, upon request, available documentation evidencing the costs associated with such purchases. NHA shall maintain a listing of all assets owned by the School and shall provide the list to the Board annually upon request.

E. Fee. NHA shall receive all Revenues as its services fee (the “**Fee**”), from which it shall pay all operating costs of the School as detailed in the Budget. NHA and the Board acknowledge that operating costs may include an administrative fee payable to the Authorizer as set forth in the Charter. Payment of the Fee shall be made on the same frequency that the School receives its Revenues. NHA shall be entitled to retain as compensation for the Services the difference, if any, between the Fee and the amount actually expended by NHA in operation and/or management of the School during the School’s fiscal year.

F. No Loans. NHA shall not make or extend loans to the Board.

G. Other Schools. The School acknowledges that NHA has entered into similar services agreements with other schools. NHA shall maintain separate accounts for expenses incurred in the operation of the School and other schools assisted by NHA, and shall reflect in the School’s financial records only those expenses incurred in the operation of the School. If NHA incurs expenses that are for both the benefit of the School and other schools assisted by NHA, then NHA shall allocate, to the extent permitted by law, such expenses among all such affected schools, including the School, on a prorated basis based upon the number of enrolled students, the number of classrooms, or the number of teachers at the affected schools, or on such other equitable basis as is reasonably determined by NHA. In no event shall marketing costs incurred solely for the benefit of NHA (and not the School) be allocated to the School.

H. Financial Reporting. NHA shall provide the Board with:

1. At least annually, the Budget as required by this Agreement.
2. Monthly, financial statements no more than forty-five (45) days in arrears and at least one week prior to each Board meeting. These financial statements will include a Balance Sheet, Statement of Revenues, Expenditures and Changes in Fund Balance at object level detail with a comparison of budget to actual revenue and expenditures and explanations of variances.
3. Quarterly, or as reasonably requested by the Board, a report on School operations and student performance.

4. As reasonably requested, other information to enable the Board to: (i) evaluate the quality of the Services; and (ii) timely provide all reports and information that are required by the Charter and applicable law.

I. Access to Financial Records. NHA shall keep accurate financial records pertaining to its operation of the School, together with all School financial records prepared by or in possession of NHA, and shall retain all of the aforementioned records according to the Charter and applicable law to which such books, accounts, and records relate. NHA and the Board shall maintain the proper confidentiality of personnel, students, and other records as required by law. All records shall be kept in accordance with applicable state and federal requirements.

J. Accounting Standards; Annual Audit.

1. The School shall at all times comply with generally accepted public sector accounting principles and applicable law.

2. The Board shall select and retain an independent auditor to conduct an annual audit of the School's financial matters in accordance with the Charter and applicable law.

3. Subject to applicable law, all records in the possession or control of NHA that relate to the School, including but not limited to, financial records, shall be made available to the School and the School's independent auditor. The expense of the annual audit shall be included in the Budget.

K. Start-up Funds; Contributions. NHA shall provide start-up funds for: (i) the development of curriculum, a technology system and a school operations plan; (ii) recruiting, selecting and training of staff members; and (iii) to the extent necessary as reasonably determined by NHA, cleaning, renovating and equipping of the School facility (the "**Start-Up Funds**"). In addition, in its sole discretion, NHA may, but need not, make contributions to the School in the event School expenses exceed Revenues (the "**Contributions**"). The Contributions, if any, shall be in amounts acceptable to NHA and the Board and, once made, shall be included in the Budget. Unless otherwise agreed, the School shall not be legally obligated to repay NHA for the Start-Up Funds or the Contributions. NHA's agreement to make such Contributions shall not be deemed to negate or mitigate the need for the School to apply for or solicit state or federal start-up funds, grants or sub-grants which the School, as a public school, may be eligible to receive.

ARTICLE VIII

PERSONNEL & TRAINING

A. Qualified Personnel. NHA shall select and hire qualified personnel to perform the Services. NHA shall have the responsibility and authority, subject to this Article, to select, hire, evaluate, assign, discipline, transfer, and terminate personnel consistent with the Budget, the Charter and applicable law. All School personnel shall be employees of NHA. NHA and the Board shall each be responsible for their respective employees. However, the compensation

of all employees working at the School shall be included in the Budget. Upon Board request, NHA shall disclose to the Board the level of compensation and fringe benefits provided by NHA to NHA employees working at the School. A criminal background check and unprofessional conduct search in compliance with applicable law shall be conditions for the hiring of, or securing the services of, any person who will or may be reasonably expected to have unsupervised access to and the care or custody of, any School student(s).

B. School Administrator. The School administrator (the “**Administrator**”) shall be an employee of NHA and not the Board. The duties and terms of the Administrator’s employment shall be determined by NHA. The Administrator shall work with NHA in the operation and management of the School. The accountability of NHA to the School is an essential foundation of this Agreement. Since the Administrator is critical to the School’s success, NHA shall have the authority, consistent with this Article, to select, hire, evaluate, assign, discipline, transfer and terminate the Administrator, and to hold the Administrator accountable for the performance of the School. Without limiting the foregoing, NHA shall consult with the Board prior to the placement and/or removal of the Administrator. Absent compelling circumstances, the consultation shall commence at least ninety (90) days prior to NHA placing and/or removing the Administrator. NHA shall give due consideration to the input, if any, of the Board or the Board’s designated representative prior to making a final decision regarding placement and/or removal of the Administrator. NHA shall remove the Administrator if the Board is reasonably dissatisfied with the Administrator’s performance. Absent compelling circumstances, however, the Board shall give NHA and the Administrator six (6) months to correct the basis for the Board’s reasonable dissatisfaction. The parties agree that the purpose of the above provisions is not to deny the Administrator the opportunity for growth and/or promotion within NHA. Notwithstanding any of the foregoing, the placement of the initial Administrator for the School in its first year of operation shall be made by NHA.

C. Teachers. NHA shall, consistent with this Article, assign to perform Services at the School, teachers qualified to teach their assigned subjects and grade level. The curriculum taught by the teachers shall be consistent with the Educational Program. The teachers may, at the discretion of NHA, be assigned to work at the School on a full or part time basis. If assigned to work at the School on a part time basis, the teacher(s) may also be assigned to work at other schools for which NHA provides services. Each teacher assigned to work at the School shall hold a valid teaching license issued by the State Board of Education to the extent required by N.C. Gen. Stat. Section 115C-218.90(1). NHA shall be required to provide parental leave benefits consistent with the benefits offered by the Local Education Agency so long as the School will qualify for state support for substitute teachers.

D. Support Staff. NHA shall, consistent with this Article, provide the School with qualified support staff as needed to operate the School in an efficient manner. The support staff may, at the discretion of NHA, work at the School on a full or part time basis. If assigned to the School on a part time basis, the support staff may also work at other schools assisted by NHA. The cost for such support staff shall be shared proportionately among the schools at which the support staff is working. An individual who provides a service to students in the School that is

not teaching, and for which a license is required under applicable law, shall have the appropriate license to provide such services.

E. Training. NHA shall provide or procure training in its methods, curriculum, program, and technology to all teaching personnel on a regular basis. Instructional personnel shall be required to obtain at least the minimum hours of professional development as required by applicable law. Non-instructional personnel shall receive training as NHA determines reasonable and necessary under the circumstances.

F. Background Checks and Qualifications. NHA shall comply with applicable law regarding background checks, unprofessional conduct searches and certification/licensure, as applicable, for all persons working in the School.

G. Terms of Employment. No member of the staff at the School shall be subject to any covenant not to compete or other employment restriction as part of the terms of his or her employment with NHA for the Services.

H. Limitations on Discretion. All decisions made by NHA, and any discretion exercised by NHA, in its selection, hiring, evaluation, assignment, discipline, transfer, and termination of personnel, shall be consistent with the Budget, the Charter, the parameters adopted and included in the Educational Program, and applicable law.

ARTICLE IX

INDEMNIFICATION

A. Indemnification of Parties. To the extent not prohibited by the Charter or applicable law, the Parties hereby agree to indemnify, defend, and hold the other (the “**Indemnified Party**”), harmless from and against any and all third-party claims, actions, damages, expenses, losses or awards which arise during the Term out of (i) the gross negligence or intentional misconduct of the indemnifying party, (ii) any action taken or not taken by the indemnifying party, or (iii) any noncompliance or breach by the indemnifying party of any of the terms, conditions, warranties, representations, or undertakings contained in or made pursuant to this Agreement. As used herein, Indemnified Party shall include the party’s trustees, directors, officers, employees, agents, representatives and attorneys. The Parties may purchase general liability, property, or other insurance policies. Notwithstanding anything in this Agreement to the contrary, the Board shall not be precluded by the terms of this Agreement from asserting or declining to assert a claim of governmental immunity.

ARTICLE X

INSURANCE

A. Insurance Coverage. NHA shall maintain during the Term such policies of insurance as required by the Charter and applicable law. Each party shall, upon request, present evidence to the other that it maintains the requisite insurance in compliance with the provisions of this Article. Each party shall comply with any information or reporting requirements required by the other party's insurer(s), to the extent reasonably practicable.

B. Workers' Compensation Insurance. Each party shall maintain during the Term workers' compensation insurance as required by law, covering their respective employees.

ARTICLE XI

REPRESENTATIONS & WARRANTIES

A. Board and School. The Board represents and warrants, for itself and on behalf of the School, that: (i) it is legally vested with all power and authority necessary to execute, deliver and perform this Agreement, including without limitation, the power and authority to contract with a private entity for the provision of educational, business administration and management services; (ii) upon issuance of a Charter it will be legally vested with all power and authority necessary to operate a charter school under the Authorizing Law; (ii); (iii) its actions have been duly and validly authorized, and it has adopted any and all resolutions or expenditure approvals required for the execution of this Agreement; and (iv) there are no pending actions, claims, suits or proceedings, or, to its knowledge, threatened or reasonably anticipated against or affecting either the Board or the School, which if adversely determined, would have a material adverse effect on its ability to perform under this Agreement.

B. NHA. NHA represents and warrants that: (i) it is a corporation in good standing and is authorized to conduct business in the State of North Carolina; (ii) it is legally vested with all power and authority necessary to execute, deliver and perform this Agreement; (iii) there are no pending actions, claims, suits or proceedings, or, to its knowledge, threatened or reasonably anticipated against or affecting NHA, which if adversely determined, would have a material adverse effect on its ability to perform its obligations under this Agreement; and (iv) it will comply with all registration and licensing requirements relating to conducting business under this Agreement, which the Board agrees to assist NHA in applying for such licenses and permits and in obtaining such approvals and consents.

ARTICLE XII

MISCELLANEOUS

A. Entire Agreement. This Agreement and any attachments hereto shall constitute the entire agreement of the Parties on the subject matter set forth herein. This Agreement supersedes and replaces any and all prior agreements and understandings regarding the subject matter set forth herein between the School and NHA.

B. Force Majeure. Except for payment obligations, and notwithstanding any other provisions of this Agreement, neither party shall be liable for any delay in performance or inability to perform due to acts of God, war, riot, embargo, fire, explosion, sabotage, flood, accident, labor strike, or other acts beyond its reasonable control; provided either party may terminate this Agreement in accordance with provisions contained herein if sufficient grounds exist as provided in the Article governing termination.

C. State Governing Law; Waiver of Jury Trial. This Agreement shall be construed, interpreted, governed and enforced pursuant to the laws of the State of North Carolina, without regard to its conflict-of-laws principles. The Parties hereby waive the right to a jury trial in any action, proceeding or counterclaim brought by either NHA or the School against the other.

D. Notices. All notices and other communications required by this Agreement shall be in writing and sent to the Parties at the facsimile number or address set forth below. Notice may be given by: (i) facsimile with written evidence of confirmed receipt by the receiving party of the entire notice; (ii) certified or registered mail, postage prepaid, return receipt requested; or (iii) personal delivery. Notice shall be deemed to have been given on the date of transmittal if given by facsimile, upon the date of postmark if sent by certified or registered mail, or upon the date of delivery if given by personal delivery. For purposes of the foregoing, “**personal delivery**” shall include delivery by nationally recognized overnight courier (such as FedEx), if signed for by the recipient or a delegate thereof. Notices to the School shall be sent to the current address of the then current Board President, with a copy to the then current Board attorney. The addresses of the Parties for the purposes aforesaid, including the address of the initial Board President, are as follows:

The School: _____
Attn: _____

Telephone: _____
Facsimile: _____

WITH A COPY TO:

NHA: National Heritage Academies, Inc.
Attn: Chief Financial Officer
3850 Broadmoor, S.E. Ste. 201
Grand Rapids, Michigan 49512
Telephone: (616) 222-1700
Facsimile: (616) 222-1701

E. Assignment. NHA may assign this Agreement with the prior written approval of the Board and in a manner consistent with the Authorizer's policies.

F. Amendment. This Agreement shall not be altered, amended, modified or supplemented except by memorandum approved by the Board and signed by both an authorized officer of the School and NHA and in manner consistent with the Authorizer's policies.

G. Waiver. No waiver of any provision of this Agreement shall be deemed or shall constitute a waiver of any other provision. Nor shall such waiver constitute a continuing waiver unless otherwise expressly stated.

H. Severability. If any term or provision of this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remainder of the terms and provisions set forth herein shall remain in full force and effect and shall in no way be affected, impaired or invalidated, and the Parties shall use their best efforts to find and employ an alternative means to achieve the same or substantially the same result as that contemplated by such term or provision.

I. Delegation of Authority. Nothing in this Agreement shall be construed as delegating to NHA powers or authority of the Board which are not subject to delegation by the Board under the Charter or applicable law.

J. Compliance with Law. Each party will comply with the Charter and laws applicable to the performance of such party's obligations hereunder.

K. Time of Essence. The Parties understand and agree that time is of the essence in performing their respective responsibilities under this Agreement during the Term of this Agreement.

L. Indebtedness. No indebtedness of any kind incurred or created by the charter school shall constitute an indebtedness to the State or its political subdivisions, and no indebtedness of the charter school shall involve or be secured by the faith, credit or taxing power of the State or its political subdivisions. (See NCGS 115C-218 et seq).

[Signatures on Following Page]

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date first written above to be effective as of the Effective Date.

NHA:

National Heritage Academies, Inc.,
a Michigan corporation

By: _____

Its: Chief Financial Officer

SCHOOL:

_____,
a North Carolina non-profit corporation

By: _____

Its: Board President

DRAFT



Appendix A4.2: Facility Buyout Agreement

Carolina Scholars Academy

Carolina Scholars Academy's relationship with National Heritage Academies (NHA) regarding the use of a school facility is specified within our lease agreement. NHA will own the facility and rent it to the school. Should we determine that NHA is not the right management partner for Carolina Scholars Academy, our lease agreement stipulates that we have the right to remain in the facility for the remainder of the current school year as well as for the following school year. Upon completion of this timeframe, we have the option to negotiate staying in the facility or we can move to a different location. We are confident this relationship serves our school well. Reasons for this include:

- NHA assumes the risk of all costs involved to develop and construct the school facility. This involves outfitting the building to accommodate full enrollment beginning on our first day (even though we will open with fewer grades and students). Our Board is not responsible for this up-front investment.
- Beyond this risk, NHA is incentivized to make sure Carolina Scholars Academy is high performing. We hold the ability to terminate our contractual relationship with NHA if we are ever dissatisfied with any component of our school, and in turn, leave NHA with an empty school facility.

There is no defined formula in the event the Board indicates an interest in purchasing the school facility. We have included a draft lease agreement with NHA that offers our Board the space and terms we require.

LEASE

THIS LEASE (“**Lease**”) is entered into the ___ day of _____ 202_, to be effective July 1, 202_ (the “**Effective Date**”) by and between NATIONAL HERITAGE ACADEMIES, INC., a Michigan corporation, of 3850 Broadmoor SE, Ste. 201, Grand Rapids, Michigan 49512 (“**Landlord**”), and CAROLINA SCHOLARS ACADEMY, a North Carolina non-profit corporation, having an address of _____, _____, North Carolina ____ (“**Tenant**”).

RECITALS

A. Landlord (defined in Section 22.5), as tenant, and Charter Development Company, L.L.C., as landlord (together with its successors, assigns and successors in interest, the “**Master Landlord**”) are party to that certain Master Lease Agreement effective January 1, 1999, as amended (the “**Master Lease**”).

B. Landlord and Master Landlord amended the Master Lease to subject the Premises thereto.

C. Tenant desires to sublease the Premises from Landlord, and Landlord desires to so sublease the Premises to Tenant, on the terms and conditions set forth herein.

NOW, THEREFORE, in consideration of the mutual covenants set forth above and herein, Landlord and Tenant agree as follows:

ARTICLE 1

The Premises and Other Agreements.

1.1 Premises. Landlord hereby leases to Tenant, on the terms and conditions hereinafter set forth, the real estate located in _____, North Carolina, (_____ County), with an address of _____, _____, North Carolina ____ and more particularly described on Exhibit “A” attached hereto (the “**Land**”), and all improvements located on the Land (the Land and such improvements as they may exist from time to time, hereinafter referred to as the “**Premises**”).

1.2 Master Lease. This Lease is subordinate and subject to the Master Lease. Tenant covenants that it shall not through its negligent, intentional or wrongful acts or omissions cause a breach or default on the part of Landlord under the terms of the Master Lease. Landlord represents and warrants to Tenant that the terms of this Lease are not inconsistent with the terms of the Master Lease, and Tenant’s compliance with the terms of this Lease will not constitute a breach of the terms of the Master Lease. Landlord and Tenant each hereby indemnify the other party against all liability, judgments, costs, damages, claims, costs and expenses, including, without limitation, reasonable attorneys’ fees arising out of or relating to such indemnifying party’s breach of the covenants, representations or warranties set out by such parties in the preceding two sentences.

1.3 Services Agreement. In accordance with the terms and conditions of that certain “**Services Agreement**” of even or similar date herewith, by and between Landlord and Tenant,

Landlord has contractually agreed to manage and operate the Premises and the school located on the Premises, and in connection with the same, Landlord is obligated to fulfill certain obligations assigned to Tenant under the terms of this Lease (the “**Services Obligations**”). In the event that Landlord fails to timely perform or fulfill one or more of the Services Obligations and said failure (a) is not otherwise excused, or subject to notice and an unexpired cure period, by the terms of the Services Agreement, and (b) is not due to the fault of Tenant, then said failure, in and of itself, shall not be deemed to be a Default by Tenant under the terms of this Lease. The foregoing sentence shall be of no further force and effect in the event of expiration or termination of the Services Agreement for any reason.

ARTICLE 2

Term.

2.1 Initial Term and Renewals. The “**Initial Term**” of this Lease shall commence on July 1, 202_ and shall terminate effective June 30, 202_ (the “**Initial Term Expiration**”), unless sooner terminated as hereinafter set forth. Provided that (a) Tenant is not then in Default under this Lease, the Services Agreement, or the “**Charter**” (as defined in Section 13.1.E. below), and (b) this Lease, the Services Agreement and the Charter are still in full force and effect, then, unless a Notice of Non-Renewal is sent as provided below, on the Initial Term Expiration (and each anniversary thereof, during the Term of this Lease), this Lease shall be automatically renewed for successive one (1) year terms, upon the same terms and conditions as contained herein. The “**Term**” of this Lease shall mean the Initial Term and every renewal term entered into by Landlord and Tenant. The term “**Upcoming Expiration Date**” shall mean the Initial Term Expiration, or if the Initial Term Expiration has occurred, then the upcoming anniversary of the Initial Term Expiration. If either party, in its sole discretion, does not wish for this Lease to automatically renew, then at least one hundred eighty (180) days prior to the Upcoming Expiration Date, such party must notify the other party in writing that it does not wish the Term to be renewed (a “**Notice of Non-Renewal**”). Upon the timely delivery of a Notice of Non-Renewal, this Lease shall terminate on the Upcoming Expiration Date.

2.2 If Tenant is entitled to terminate this Lease due to Landlord’s default hereunder or if Tenant is entitled to terminate the Services Agreement due to Landlord’s default thereunder, then provided that Tenant is not in default hereunder or under the Services Agreement, Tenant may elect by written notice to Landlord given within thirty (30) days after Tenant provides notice to Landlord of such default and Landlord fails to cure such default, leave this Lease in effect (except for any Lease renewal and assignment rights) for the remainder of the school year then in effect plus the succeeding one (1) school year (July 1 to June 30)(collectively, the “**Holdover Period**”), in which event the effective termination date of the Lease shall be the earlier of the last day of such Holdover Period or the date upon which Tenant vacates the Premises in accordance with the terms of this Lease, provided however that at the time of Tenant’s election and at all times during such Holdover Period Tenant (i) is not in default under this Lease or the Services Agreement, and (ii) Tenant’s Charter is in full force and effect (the “**Holdover Option**”). In the event Tenant so elects to remain in possession pursuant to the Holdover Option, Tenant shall give Landlord written notice not later than sixty (60) days before the last day of each succeeding school year during the Holdover Period as to whether or not Tenant elects to remain in possession for the next succeeding school year; in the event Tenant gives no such notice, Tenant shall be deemed to

have elected not to remain in possession, and the Lease shall terminate when Tenant vacates the Premises (which it shall timely due upon the end of the then school year).

ARTICLE 3

Rent.

3.1 Annual Rent. During the Initial Term, Tenant hereby leases said Premises for the Term above stated and agrees to pay Landlord annual rent of _____ and ___/100 Dollars (\$_____), (“**Annual Rent**”) in twelve (12) equal monthly installments of _____/100 Dollars (\$_____) (each, a “**Monthly Installment**”) each payable to Landlord (or to such other “Person” (defined in Section 22.9) or agent as Landlord may specify by written notice to Tenant) in advance on the first day of each calendar month during the Term. The term “**Lease Year**” is defined to mean any twelve month period from July 1 to June 30 of the following year, during the Term. If the Term ends before the end of a Lease Year, Annual Rent shall be prorated on a daily basis and paid in advance by Tenant on the first day of the last calendar month during the Term. Annual Rent may be adjusted upon determination of final costs for acquisition and construction of the Premises.

3.2 Additional Rent. Any amounts due from Tenant to Landlord hereunder, other than Annual Rent, shall constitute “**Additional Rent.**” Additional Rent shall, unless expressly provided to the contrary in this Lease, be payable from Tenant to Landlord on the same terms that Annual Rent is payable, with the next payment of the Monthly Installment coming due hereunder. Annual Rent and Additional Rent may be referred to collectively herein as “**Rent**”.

3.3 Payments. All Rent shall be paid to Landlord at Landlord’s address as set forth in the introductory paragraph hereof, or at such other address as Landlord may designate in writing. This Lease is a triple net lease and Rent shall be paid without setoff, counterclaim, recoupment, abatement, suspension, or deduction, except as expressly provided for herein. This Lease shall not terminate, nor shall Tenant have any right to terminate this Lease during the Term (except as otherwise expressly provided herein), nor shall Tenant be entitled to any abatement, deduction, deferment or reduction of Annual Rent hereunder (except as otherwise expressly provided herein), nor shall the obligations of Tenant under this Lease be affected by any interference with Tenant’s use of the Premises unless caused by Landlord or Master Landlord. It is the intention of the parties hereto that the obligation of Tenant to pay Rent hereunder shall be separate and that the Rent shall continue to be payable in all events and that the obligations of Tenant hereunder shall continue unaffected, unless the requirement to pay or perform the same shall have been terminated pursuant to an express provision of this Lease.

3.4 Landlord’s Right to Increase. In the event Landlord makes future economic investments in capital improvements to the Premises, or acquires additional property for the benefit or use of Tenant (with such capital improvements or additional property acquisitions being subject to the written consent of Tenant if and to the extent that the cumulative costs thereof exceed Two-Hundred and Fifty Thousand Dollars (\$250,000) during any Lease Year, which consent shall not be unreasonably withheld, conditioned or delayed), then the Annual Rent payable by Tenant shall be promptly adjusted to compensate Landlord for such additional economic investment.

ARTICLE 4

Use, Occupancy and Purpose.

4.1 Permitted Uses.

A. Tenant shall use the Premises solely for operating a publicly chartered school or academy for grades kindergarten through 8th grade, and for ancillary or directly related uses.

B. Any other use of the Premises must be approved by Landlord in advance in writing.

4.2 Restrictions on Use.

A. Tenant shall not use or allow the use of the Premises for any unlawful purpose, nor shall Tenant allow the Premises to be used in violation of the Charter.

B. Tenant shall not allow the Premises to be used in violation of any public law, ordinance, rule or regulation, or in violation of any certificate of occupancy or certificate of compliance covering or affecting the Premises, or any part thereof. Tenant shall not suffer any act to be done or any condition to exist on the Premises or any part thereof which may in law constitute a nuisance, public or private, or which may make void or voidable, or increase premiums for, any insurance with respect thereto. Tenant shall not commit any waste, damage, or injury of or to the Premises or the fixtures or any part thereof and shall take all reasonable precautions and actions to prevent others from committing any of the foregoing.

4.3 Prohibited Uses.

A. Tenant covenants unto Landlord that during the Term, no part of the Premises shall be used for: the operation of any (i) private or commercial golf course, (ii) country club, (iii) massage parlor, hot tub facility, or suntan facility (iv) race track or other facility used for gambling, or (v) store the principal business of which is the sale of alcoholic beverages for consumption off premises; or the rental to others of residential property (as defined in Section 168(e)(2)(A) of the Internal Revenue Code).

B. Notwithstanding anything contained in this Lease to the contrary, in the event of a breach of any of the covenants contained in this Section 4.3, Landlord may immediately terminate this Lease by written notice to Tenant.

4.4 Educational Program. Tenant shall neither use the Premises nor allow the Premises to be used at any time during the Term in a manner that interferes with the performance of Landlord's obligations under the Services Agreement, including without limitation, the implementation and delivery of the Educational Program at the Premises. Tenant acknowledges that the terms of the preceding sentence are intended to allow Landlord to restrict access to certain portions of the Premises at certain times provided such access restriction is at all times consistent with the implementation and delivery of the Educational Program.

ARTICLE 5

Utilities.

5.1 Utility Connections; Utility Service. Landlord represents and warrants that construction of the Premises pursuant to Section 9.1 shall include provision of connections for all utility services necessary to the operation of a school at the Premises. Utility services, including without limitation gas, electricity, light, heat, water, sewage and telephone or other communication services, shall be contracted for and paid for by Tenant.

5.2 Disclaimers. Unless due to the gross negligence or willful misconduct of Landlord, Landlord shall not be liable for (i) any failure of water supply or electric current or any service by any utility provider or local government, or (ii) injury to persons, including death, or damage to property resulting from steam, gas, electricity, water, rain or snow which may flow or leak from any part of the Premises or from any pipes, appliances or plumbing works from the street or subsurface or from any other place. Any express or implied rights, easements or licenses for view purposes or for the passage of light and air are hereby expressly disclaimed by Tenant. Except as otherwise expressly provided in this Lease or as may be provided in the Services Agreement, Landlord shall have no obligation to provide any services to Tenant or to the Premises.

5.3 Modifications and Replacements. If the existing utility services are required to be modified or replaced for any reason by any utility company or authorized agency, governmental or otherwise, then Tenant shall make such modifications or replacements at Tenant's expense and shall save Landlord harmless therefrom.

ARTICLE 6

Taxes.

6.1 Payment by Tenant. Tenant shall pay all (a) taxes levied on or assessed against the Premises during the Term, (b) special assessments levied on or assessed against the Premises during the Term that become due and payable during the term of this Lease, and (c) other similar charges levied on or assessed against the Premises during the Term and that become due and payable during the term of this Lease, except income and other taxes assessed against or by reason of Landlord's reversionary interest in or income from the Premises (the "Taxes"), (i) prior to the date on which any penalties, interest or late charges would apply, and to save Landlord harmless from the payment thereof, or (ii) to Landlord, in accordance with the terms of Section 6.4, provided Landlord makes the demand on Tenant required in Section 6.4. Taxes for the first and last year of the Term or any extension or renewal thereof shall be prorated on the basis of the fiscal period for which such tax is assessed.

6.2 Landlord's Option to Pay. If at any time after any tax, assessment or similar charge so charged or assessed against said Premises shall become due or payable and Tenant shall neglect or fail to pay the same, Landlord, without being obligated to do so, may pay the same at any time thereafter, and the amount of any and all such payments so made by Landlord shall be and is hereby declared to be payable as Additional Rent with the next Monthly Installment due hereunder.

6.3 Payment at End of Term. At the termination of this Lease by lapse of time or otherwise, all Taxes payable by Tenant under the provisions of this Article 6 shall be paid by Tenant to Landlord.

6.4 Monthly Installments. Upon demand of Landlord, (i) Tenant shall pay as Additional Rent, in addition to each Monthly Installment due hereunder, a sum equivalent to one-twelfth of the amount estimated by Landlord to be sufficient to enable Landlord to pay at least thirty (30) days before they become due, all such taxes, assessments and other charges, and (ii) Tenant will deliver and pay over to Landlord such additional sums as are necessary to make up any deficiency in the amount necessary to enable Landlord to fully pay such taxes, assessments and other charges. Any such tax payments from Tenant may be commingled with the general funds of Landlord and no interest shall be payable in respect thereof. If Landlord receives tax payments from Tenant in accordance with this Section, then Landlord shall pay the full amount of taxes, assessments and other charges when due to the appropriate taxing authorities. In the event Tenant's tax payments under this Section are in any way insufficient to pay the full amount of taxes, assessments and other charges when due to the appropriate taxing authorities, then Tenant shall pay to Landlord, as Additional Rent, any shortfall within thirty (30) days of receiving a demand therefor from Landlord.

6.5 Non-Real Property Taxes. In the event that the City, County, State, or any other political subdivision that has taxing authority over the Premises shall, during the Term, impose upon Landlord any tax or other governmental charge in lieu of all or any part of the Taxes (a "**Non-Real Property Tax**"), such Non-Real Property Tax shall, for purposes of this Section, be treated as if it were included in the Taxes, unless the Taxes have been paid by Landlord.

6.6 Receipts. Upon demand of Landlord within ninety (90) days after the date all or any part of the Taxes are payable by Tenant, Tenant shall provide to Landlord official receipts of the appropriate taxing authority or other proof satisfactory to Landlord of the payment of such Taxes.

ARTICLE 7

Insurance.

7.1 Tenant will cause to be maintained policies of fire and extended coverage insurance on all buildings, structures, fixtures and improvements now or hereafter situated on the Premises and all other property leased hereunder in their full replacement cost. Such policies shall have no greater than eighty (80%) percent co-insurance provision and shall contain the standard "agreed amount" clause for evaluating replacement cost. Such policies shall name Tenant, Landlord, other parties designated by Landlord and the "first mortgagee" (defined in Section 22.3) as their interests may appear as insureds and such insurance shall be carried by an insurance company or companies approved by Landlord and the first mortgagee. Tenant shall make available to Landlord on request copies of said policies. Notwithstanding the aforesaid, in no event shall the manner, forms, companies, sums or length of terms be less than that required by the first mortgagee according to the terms and provisions of the "first mortgage" (defined in Section 22.2)..

7.2 Each such policy shall include: (i) a standard mortgagee clause in favor of the first mortgagee; (ii) a provision to the effect that the waiver of subrogation rights by the insured does not void the coverage; (iii) a provision that the policy shall not be changed or canceled without at least thirty (30) days' prior written notice to Landlord and the first mortgagee; and (iv) a provision that any forfeiture of the policy due to an act of Tenant shall not affect the validity insofar as Landlord or the first mortgagee are concerned.

7.3 From time to time as required by Landlord or the first mortgagee, Tenant at its expense, shall obtain from an engineer or appraiser, in the regular employ of the insurer, or an appraiser, engineer, architect or contractor designated by Tenant and approved by Landlord and the insurer, such evidence as may be required by such insurer to maintain the "agreed amount" clause eliminating the possibility of any co-insurance penalty.

7.4 If Tenant shall refuse or fail to so insure and keep insured the Premises and keep such policies in Landlord's and first mortgagee's possession, Landlord may at its election procure and from time to time renew such insurance, and the amounts expended therefore shall be Additional Rent due from Tenant with the next installment of Rent accruing hereunder and may be collected in the same manner as though Rent due hereunder.

7.5 Upon demand from Landlord, Tenant shall pay in advance as Additional Rent, a sum equivalent to one-twelfth of the amount estimated by Landlord to be sufficient to enable Landlord to pay at least thirty (30) days before they become due all insurance premiums on all policies of insurance required or allowed to be carried by Tenant hereunder. Such Additional Rent may be commingled with the general funds of Landlord and no interest shall be payable in respect thereof. Upon demand by Landlord, Tenant will pay Landlord, as Additional Rent, such additional sums as are necessary to make any deficiency in the amount necessary to enable Landlord to fully pay such premiums.

7.6 Landlord shall have no liability for damage to or loss of personal property located upon the Premises, unless and to the extent caused by Landlord.

ARTICLE 8

Casualty; Restoration.

8.1 If the Premises are damaged by fire or other casualty (a "**Casualty**"), Tenant shall give immediate written notice thereof to Landlord and the first mortgagee ("**Tenant's Casualty Notice**"). Landlord shall, within 60 days after receipt of Tenant's Casualty Notice, deliver to Tenant a good faith estimate (the "**Damage Notice**") of the time needed to repair the damage caused by such Casualty ("**Restoration**").

If the Premises are damaged by Casualty such that Tenant is prevented from conducting its business in the Premises in a manner reasonably comparable to that conducted immediately before such Casualty and Landlord estimates that the damage caused thereby cannot be repaired within 210 days after the commencement of repairs (the "**Repair Period**"), then Tenant may terminate this Lease by delivering written notice to Landlord of its election to terminate within 30 days after the Damage Notice has been delivered to Tenant.

If a Casualty occurs and (1) Landlord estimates that the damage cannot be repaired within the Repair Period, (2) regardless of the extent of damage, (a) the damage occurs during the last twelve (12) months of the Term or (b) the damage is not fully covered by Tenant's insurance policies or any insurance Landlord may carry on the Premises or (c) Landlord makes a good faith determination that restoring the damage would be uneconomical, or (3) Landlord is required to pay any insurance proceeds arising out of the Casualty to a first mortgagee, then, in any such case, Landlord may terminate this Lease by giving written notice of its election to terminate within 30 days after the Damage Notice has been delivered to Tenant.

If neither party elects to terminate this Lease following a Casualty, then Landlord shall, within a reasonable time after such Casualty, begin to repair the Premises and shall proceed with reasonable diligence to restore the Premises to substantially the same condition as they existed immediately before such Casualty; however, Landlord shall not be required to repair or replace any improvements, alterations or betterments made by Tenant within the Premises (which shall be promptly and with due diligence repaired and restored by Tenant at Tenant's sole cost and expense) or any furniture, equipment, trade fixtures or personal property of Tenant or others in the Premises or the Project, and Landlord's obligation to repair or restore the Premises shall be limited to the extent of the insurance proceeds actually received by Landlord for the Casualty in question. If this Lease is terminated under the provisions of this Article 8, Landlord shall be entitled to the full proceeds of the insurance policies providing coverage for all alterations, improvements and betterments in the Premises (and, if Tenant has failed to maintain insurance on such items as required by this Lease, Tenant shall pay Landlord an amount equal to the proceeds Landlord would have received had Tenant maintained insurance on such items as required by this Lease).

8.2 Rent insurance proceeds, if payable, shall be applied by Tenant to the payment of, when and as due and payable, the installments of Rent and other payments due under this Lease until Restoration has been completed or until the Lease is terminated pursuant to any terms hereof. The balance, if any, of such proceeds shall be paid to Tenant or as Tenant may direct.

8.3 During any period of Restoration, Rent shall abate in proportion to the portion of the Premises that cannot be used for school purposes in Tenant's reasonable determination.

ARTICLE 9

Care of Premises.

9.1 Tenant will keep the Premises and all other property leased hereunder in good condition and repair, and will yield and deliver the same to Landlord at the expiration or termination of the Lease in as good a condition as when taken, reasonable use and wear thereof, and damages thereto by Landlord or its agents or invitees, excepted. Tenant shall also maintain all portions of the Premises and adjoining areas in a clean and orderly condition, free of dirt, rubbish, snow, ice and unlawful obstructions, except for those attributable to Landlord's use or action. Tenant may not make any repairs, alterations, additions, changes or improvements to the Premises, except as described above in Section 5.3, without the written consent of Landlord. All repairs, alterations, changes or improvements shall be completed and maintained by Tenant in good workmanlike condition, free and clear of all liens and encumbrances arising out of such work.

9.2 Without limiting the rights granted to Landlord under Article 4 of this Lease, Landlord shall have the right to enter upon the Premises for the purpose of making any repairs thereto and performing any work thereon which may be necessary by reason of Tenant's failure to make any such repairs or perform any such maintenance work as provided herein. Except in case of emergency, the privilege and right of entry shall be exercised at reasonable times and at reasonable hours. Tenant shall pay the cost of any such repairs and maintenance work to Landlord, upon demand therefor and upon submission of satisfactory evidence of Landlord's payment of such costs which sums shall constitute Additional Rent.

ARTICLE 10

Liability.

10.1 Tenant agrees to save Landlord and the first mortgagee harmless from any and all liabilities, losses, damages, penalties, costs and expenses arising from any injury or death to any person or damage to any property in, on, or about the Premises which arise out of (i) gross negligence or willful misconduct of Tenant, or (ii) any noncompliance or breach by Tenant of any of the terms, conditions, warranties, representations, or undertakings contained in or made pursuant to this Lease. Tenant agrees to procure at its own expense public liability and property damage, single limit liability insurance for the benefit of Landlord, Tenant and the first mortgagee as their interests may appear, in amount not less than One Million Dollars (\$1,000,000) to keep such insurance in force during the Term hereof, and to deliver certificates of such coverage to Landlord at least annually. In the event Tenant defaults as to any such obligations, Landlord may obtain such insurance and charge the cost thereof to Tenant as Additional Rent, payable with the monthly installment next coming due.

10.2 Landlord agrees to save Tenant harmless from any and all liabilities, losses, damages, penalties, costs and expenses arising from any injury or death to any person or damage to any property in, on, or about the Premises to the extent caused by willful misconduct or negligence by Landlord. Landlord agrees to procure at its own expense public liability and property damage, single limit liability insurance for the benefit of Landlord and Tenant as their interests may appear, in amount not less than One Million Dollars (\$1,000,000) to keep such insurance in force during the Term hereof, and to deliver certificates of such coverage to Tenant; Landlord agrees to furnish to Tenant upon request certificates of insurance evidencing such insurance.

10.3 Each party hereto, for itself and its respective successors and assigns (including any person, firm or corporation which may become subrogated to any of its rights), waives any and all rights and claims for recovery against the other party, and its officers, employees, agents, and assigns, or any of them, on account of any loss or damage to any of its property insured under any valid and collectible insurance policy or policies, to the extent of any recovery collectible under such insurance. Notwithstanding the foregoing, this waiver shall not be applicable if it has the effect of invalidating any insurance coverage of Landlord or Tenant.

ARTICLE 11

Compliance.

11.1 During the Term, Tenant shall assure compliance with all Legal Requirements relating to Tenant, the conduct of Tenant's business or pertaining to or otherwise affecting the use of the Premises; and Tenant shall reimburse Landlord for any damages or penalties suffered because of any such noncompliance. Landlord hereby represents that as of the Effective Date, the Premises is in compliance with all Legal Requirements; and Landlord shall reimburse Tenant for any damages or penalties suffered because of any such noncompliance of Landlord.

11.2 Tenant represents that no indebtedness of any kind incurred or created by Tenant herein shall constitute an indebtedness to the State or its political subdivisions, and no indebtedness of Tenant shall involve or be secured by the faith, credit or taxing power of the State or its political subdivisions. (See NCGS 115C-218.105).

ARTICLE 12

Assignment and Subletting.

12.1 Tenant shall not assign, transfer, sublet or otherwise allow the use by another Person of the Premises or any part thereof or any interest hereunder without first obtaining the written consent of Landlord, which may be withheld by Landlord for any reason. Landlord may, in its sole discretion, assign, transfer, pledge and convey its rights, title and interests in the Premises and/or this Lease, without the consent of or notice to Tenant; provided, however, the terms and conditions of this Lease as set forth herein as of the execution date of this Lease shall have not been modified or amended by such assignment and shall be subject to Section 23.3 hereof.

ARTICLE 13

Default.

13.1 Tenant shall be in default upon occurrence of any of the following events (any of the following, a "**Default**"):

A. Failure by Tenant to pay any portion of Rent for a period of more than ten (10) days after Tenant receives written notice of such failure to pay from Landlord (a "**Monetary Default**"); provided in no case shall Landlord be obligated to send notice of failure to pay more than twice in any twelve (12) month period.

B. Failure by Tenant to comply with any term, provision, condition or covenant of this Lease (other than a Monetary Default or as specified in Subsection F. below), if such failure is not cured by Tenant within a period of thirty (30) days after Tenant receives written notice from Landlord specifying such failure

C. Tenant's becoming insolvent, as that term is defined by any federal or state law or regulation (the "**Insolvency Laws**"); the appointment of a receiver or custodian for all or a substantial portion of Tenant's property or assets; the institution of a foreclosure action upon all

or a substantial portion of Tenant's real or personal property; the filing of a voluntary petition under the provisions of the Bankruptcy Code or Insolvency Laws; the filing of an involuntary petition against Tenant as the subject debtor under the Bankruptcy Code or Insolvency Laws, which is either not dismissed within sixty (60) days of filing, or results in the issuance of an order for relief against the debtor, whichever is later; or Tenant's making or consenting to an assignment for the benefit of creditors or a common law composition of creditors, or if Tenant's leasehold interest herein shall be levied on execution.

D. Termination of the Services Agreement due to default made or caused by Tenant in any of the covenants, terms or conditions of the Services Agreement required to be kept or performed by Tenant.

E. Expiration or discontinuance for any reason of the Charter granted to Tenant by its authorizer (the "**Charter**"), other than an expiration or discontinuance which results in a new Charter effective as of termination of the existing Charter and with terms which would not, in Landlord's opinion, substantially alter Tenant's ability to comply with the terms of the Lease, Services Agreement, or Charter.

F. Failure by Tenant to deliver the certificate required by Section 23.2 within the time required by such Section.

13.2 Landlord's Remedies. Upon the occurrence of any Default and the lapse of any grace or cure periods without cure thereof, Landlord shall have the option to pursue any one or more of the following remedies upon notice to Tenant:

13.2.1. *Termination.* Terminate this Lease or terminate Tenant's right to possession, and in either event, accelerate all obligations of Tenant owed to Landlord under the Lease and force Tenant to immediately surrender the Premises to Landlord. Tenant agrees to pay to Landlord on demand the costs which Landlord may suffer by reason of such termination. Immediately upon any termination Landlord shall be entitled to recover from Tenant (i) all outstanding and unpaid Rent as of the date of such termination, (ii) the unamortized cost of any initial upfit work performed according to this Lease by Landlord in anticipation of Tenant's occupancy, (iii) the amount of any Rent that was abated pursuant to this Lease, and (iv) all future Rent due for the remaining balance of the Term, which future Rent shall be discounted to present value using a discount rate equal to the U.S. Treasury Bill or Note rate with the closest maturity to the remaining term of the Lease as selected by Landlord.

13.2.2. *Possession.* Enter upon and take possession of the Premises and expel or remove Tenant and any other person who may be present, without terminating the Lease or being liable for prosecution or any claim for damages, and, if Landlord so elects, relet the Premises on such terms as Landlord may determine, subject, however to Tenant's right to stay in possession of the Premises until the end of the current school year in accordance with the Services Agreement.

13.2.3. *Entry.* Enter upon the Premises without being liable for prosecution or any claim for damages, and do whatever Tenant is obligated to do under the terms of this Lease. Tenant agrees to reimburse Landlord on demand for any expenses which Landlord may incur in effecting compliance with Tenant's obligations.

13.2.4. *Mitigation.* Landlord shall have a duty to mitigate damages in the event of a Tenant Default, provided, however, that Landlord shall not be obligated (a) to favor the Premises for re-letting in comparison to other real property owned or leased by Landlord in the vicinity of the Premises, (b) to discount or disregard any of the following factors regarding a potential new tenant for the Premises: term of proposed lease, proposed rent, proposed use and the creditworthiness and reputation of the proposed tenant, or (c) to spend more toward re-letting the Premises than Landlord would spend in leasing real property in the ordinary course of its business.

13.2.5. *Application of Proceeds.* Any proceeds of re-letting the Premises shall be applied to pay (i) first, all costs of Landlord incurred in connection with such re-letting (including without limitation, all costs and expenses of taking possession of the Premises, securing new tenants, including expenses for redecoration, alterations or other upfit costs), (ii) second, any indebtedness of Tenant other than Rent, (iii) third, all then-outstanding Rent due hereunder, and (iv) fourth, any future obligations of Tenant, including without limitation, Rent. Tenant agrees to pay to Landlord on demand any deficiency that may arise by reason of such re-letting within ten (10) days of notice of the same from Landlord, following a re-letting. In the event Tenant pays to Landlord all accelerated sums due, any amounts applicable to Rent following the date of re-letting shall be reimbursed to Tenant as received.

13.3 No termination of this Lease pursuant to this Section or repossession of the Premises or any part thereof or of any other property leased hereunder shall relieve Tenant of its liabilities and obligations under this Lease that accrue during the Term, all of which shall survive any such termination or repossession and, if the Premises or any part thereof shall not have been relet, Tenant shall pay to Landlord as and for liquidated and agreed current damages the then present value of the Rent and other sums and charges to be paid by Tenant until what would have been the end of the Term in the absence of such termination or repossession. Landlord shall make a good faith effort to relet the Premises and alleviate Tenant of additional damages. Exercise of any remedy hereunder by Landlord shall not exclude the right to exercise any other remedy hereunder. Notwithstanding any of the foregoing obligations of Tenant stated herein to the contrary, upon termination of this Lease or Tenant's dispossession of the Premises, Tenant will automatically be relieved from and after the date of such termination or dispossession of all personal liability for the performance of any covenants or obligations on the part of Tenant contained in this Lease thereafter to be performed except for those liabilities expressly stated to have survived such termination or dispossession as stated herein.

13.4 To the extent applicable, Tenant has been made aware that Master Landlord as landlord under the Master Lease, or National Heritage Academies, Inc., as tenant under the Master Lease or an Affiliate (defined in Section 22.1) of either or any other Person that enjoys an interest in the Premises seeks the benefits offered pursuant to the U.S. Department of Treasury New Markets Tax Credit program and may pursue other federal, state or city funds, subsidies (including any city real estate tax exemptions or abatements) or loans (collectively, the "**Benefits**") in connection with the use of the Premises, and as a result of the grant of the Benefits, the Premises may be subject to certain use restrictions. Tenant shall have no responsibility and bear no liability for any claims, fees, expenses, costs or other impositions arising from or in connection with the Benefits due to the termination of this Lease or Tenant's dispossession of the Premises.

ARTICLE 14

Waiver of Breach.

14.1 No waiver by either party hereto of any breach of any of the terms of this Lease shall be deemed to be a waiver of any other or subsequent breach.

ARTICLE 15

Surrender.

15.1 Upon the expiration or earlier termination of this Lease, Tenant shall (i) surrender the Premises in broom clean, in good condition, free and clear of all lettings and occupancies, (except those previously approved by Landlord), free and clear of all liens and encumbrances, except that part of the Premises which have been taken through eminent domain, if any, after the delivery hereof, and otherwise in the same condition as Tenant received the Premises on the first day of the Initial Term, except for the following (which are allowed to remain at the Premises): any alterations that Landlord has not required to be removed, normal wear and tear and loss by fire or other casualty losses for which insurance proceeds have been received by Landlord; (ii) surrender all keys for the Premises to Landlord and (iii) inform Landlord of all combinations on locks in the Premises. All installations, alterations, additions and improvements, including partitions which may have been installed by either Landlord or Tenant, shall remain upon the Premises and shall become Landlord's property, all without compensation, allowance or credit.

15.2 On or before the scheduled expiration of the Term, Tenant may elect to remove its personal property and any fixtures and equipment. Any of Tenant's items listed in the preceding sentence not removed at the end of the Term shall be considered abandoned, and Landlord may appropriate such items for itself, sell such items or otherwise dispose of the same in such commercially reasonable manner as Landlord deems expedient without any liability to Tenant or any parties claiming by, through or under Tenant. In the event the Term terminates for any reason on other than its scheduled expiration date, then Tenant shall have a period of time in which to re-enter the Premises to retrieve its personal property, beginning on the date the Term terminates and ending fifteen (15) days thereafter. Any damage caused to the Premises by such removal shall be repaired by Tenant no later than fifteen (15) days after the end of the Term, but no Rent shall be payable by Tenant for such period of time (and such continued use of the Premises by Tenant shall not be deemed a holdover or a renewal or as creating a periodic or other similar tenancy that might be implied by law). Tenant shall reimburse Landlord for any damage to any portion of the Premises caused by Tenant during the removal of any items contemplated for potential removal in this Section.

ARTICLE 16

Eminent Domain.

16.1 If all or any part of the Premises shall be taken by any Governmental Authority under power of eminent domain, or by private purchase in lieu thereof, all damages awarded for such taking shall belong to and be the property of Landlord, whether such damages shall be awarded as compensation for the taking of or diminution in value to the leasehold or the fee of the

Premises and Tenant hereby irrevocably assigns to Landlord any award or payment to which Tenant may become entitled as a result thereof, provided, however, that Tenant shall be entitled to receive from such Governmental Authority compensation for its fixtures and personal property so taken.

16.2 In the event that only a part of the Premises are so taken, and the part not so taken cannot be completed as an architectural unit for the use described in Section 4.1 hereof, Tenant shall have the option to terminate this Lease by serving written notice of termination on Landlord within sixty (60) days after the taking.

16.3 If only a part of the Premises shall be so taken such that the part not so taken can be completed as an architectural unit for the use described in Section 4.1 hereof, Landlord (or at Landlord's direction, Tenant) shall, as promptly as practicable, make a complete architectural unit of the remainder of the building on the Premises (but only to the extent of the proceeds received for such taking); and there shall be an abatement of the monthly Rent hereinabove provided for in an amount equal to the percentage of the Premises and the building so taken.

ARTICLE 17

Notices.

17.1 All notices and communications required under this Lease shall be in writing and served personally or by nationally recognized overnight courier on Landlord and on Tenant at the address indicated on page one (1) hereof, or at such other address as may be designated in writing to the other party hereto by notice in accordance with this Section.

ARTICLE 18

Self Help.

18.1 If Tenant shall at any time fail to make any payment or perform any act on its part to be made or performed hereunder, then Landlord without notice to Tenant, except when other notice is expressly provided for in this Lease and without waiving or releasing Tenant from the obligations of Tenant contained in this Lease, may (but shall be under no obligation to) make such payment or perform such act, and may enter upon the Premises for any such purpose, and take all such actions thereon as may be necessary to address Tenant's non-payment or failure to act.

18.2 All sums to be paid by Landlord and all costs and expenses incurred by Landlord in connection with the performance of any such act referenced in Section 18.1, together with any consequential damages Landlord may suffer by reason of the failure of Tenant to make such payment or perform such act, and counsel fees incurred by Landlord in connection therewith or in enforcing its rights hereunder, shall be paid by Tenant to Landlord on demand as Additional Rent.

18.3 Tenant agrees to hold Landlord harmless from any inconvenience or interference with Tenant's operation of its business as a result of Landlord's exercising any rights granted under Section 18.1.

ARTICLE 19

Construction Liens.

19.1 Tenant will not create nor permit to be created or to remain, and will promptly discharge, at its sole cost and expense, any lien, encumbrance or charge upon the Premises or any part thereof, or upon Tenant's leasehold interest therein, except such as are created by Landlord or the first mortgagee.

ARTICLE 20

Environmental Matters.

20.1 Tenant shall not use or store any Hazardous Materials (as defined in Section 20.3) on the Premises, except in compliance with Legal Requirements.

20.2 To the extent directly related to the conduct of Tenant, Tenant's use of the Premises, or the operation of its business thereon, Tenant shall defend, indemnify and hold harmless Landlord, its employees, agents, officers and directors, from and against any claims, demands, penalties, fines, liabilities, settlements, damages, costs or expenses of whatever kind or nature, known or unknown, contingent or otherwise, arising out of, or in any way related to, (1) the presence, disposal or release of any Hazardous Materials by Tenant on, over, under, from or affecting the Premises or the soil, water, vegetation, buildings, personal property, persons thereon by reason of Tenant's action or inaction on the Premises; (2) any personal injury (including wrongful death) or property damage (real or personal) arising out of or related to such Hazardous Materials existing on the Premises by reason of Tenant's action; (3) any lawsuit brought or threatened, settlement reached or government-issued order relating to such Hazardous Materials existing on the Premises by reason of Tenant's action; and/or (4) any violation of Legal Requirements based upon or in any way related to such Hazardous Materials existing on the Premises by reason of Tenant's action including, without limitation, reasonable attorney's and consultant's fees, investigation and laboratory fees, court costs and litigation expenses. As used herein, "**Hazardous Materials**" means and includes petroleum, petroleum products, asbestos, asbestos-containing materials, radioactive materials, waste oils, solvents and chlorinated oils, polychlorinated biphenyls (PCBs), and any other water, material or substance that is defined as hazardous or toxic under or regulated by any federal, state or local agency, law, rule or regulation (whether now existing or hereafter enacted or promulgated, as they may be amended from time to time) pertaining to environmental conditions, the environment, contamination or clean up, including, without limitation, federal, state or local solid waste disposal rules, the Comprehensive Environmental Response, Compensation and Liability Act of 1980, as amended, the Hazardous Materials Transportation Act, as amended, the Resource Conservation and Recovery Act, as amended, the Toxic Substances Control Act, as amended, the Water Pollution Control Act, as amended, the Clean Air Act, as amended, or any other applicable federal, state or local laws, regulations, publications of Governmental Authorities, or ordinances pertaining to Hazardous Materials (collectively, "**Environmental Laws**").

20.3 Tenant shall promptly notify Landlord as soon as it knows of or suspects that any Hazardous Materials has been released or that there is a threatened release on the Premises and it

shall take such action at its sole expense and with due diligence, as is necessary to insure timely compliance with Legal Requirements unless caused by Landlord. Landlord shall promptly notify Tenant as soon as it knows or suspects any Hazardous Materials has been released or that there is a threatened release on or in the Premises and Landlord shall take such action at its sole expense and with due diligence, as is necessary to ensure timely compliance with Legal Requirements unless caused by Tenant.

20.4 The Tenant has no liability for, or obligation to investigate, clean, remove, remediate or otherwise deal with Hazardous Materials present at the Premises prior to the date upon which Tenant first took possession or control of the Premises (it being the intent of the parties that as between Landlord and Tenant, Landlord shall be responsible for the foregoing, except (i) if and to the extent Tenant (its employees, contractors, licensees, officers, directors, or other parties claiming through or acting for Tenant) through its acts or omissions exacerbates such pre-existing condition, or (ii) otherwise provided under any applicable Legal Requirements, laws, ordinances, or regulations.

20.5 The provisions of this Article 20 shall be in addition to any and all obligations and liabilities of Tenant and Landlord may have to each other under Legal Requirements, and shall survive the expiration and termination of the Lease for any reason.

ARTICLE 21

Late Charges.

21.1 In the event of any failure by Tenant to pay Rent when due, Tenant shall also pay to Landlord, as Additional Rent, a late charge of five percent (5%) of such delinquent payment.

ARTICLE 22

Certain Definitions.

22.1 The term “**Affiliate**” means, with respect to any Person, any other Person that directly or indirectly through one or more intermediaries, controls, or is controlled by, or is under common control with, such first Person or any of its subsidiaries. As used in this definition, the term “control” means (a) the power to vote five percent (5%) or more of the securities or other equity interests of a Person having ordinary voting power, or (b) the possession, directly or indirectly, of any other power to direct or cause the direction of the management and policies of a Person, whether through ownership of voting securities, by contract or otherwise.

22.2 The term “**first mortgage**” means any mortgage now existing or hereafter becoming a first and paramount lien on the Premises, subject to easements and restrictions of record, and all assignments, modifications, extensions and renewals thereof.

22.3 The term “**first mortgagee**” or “**holder of the first mortgage**” means the Person(s) who is(are) the holder(s) or beneficiary(ies) under the first mortgage from time to time.

22.4 The term “**Governmental Authority**” or “**Governmental Authorities**” means the government of the United States of America or any state or other political subdivision of either

thereof, or any entity that exercises executive, legislative, regulatory, administrative, judicial, quasi-governmental or quasi-judicial functions of, or pertaining to, any such government, whether now or hereafter in existence having jurisdiction over the matter or matters in question.

22.5 The term “**Landlord**” is limited to mean and include, so far as covenants, agreements, stipulations or obligations on the part of Landlord are concerned, the tenant under the Master Lease to the Premises or its assignee, at the time in question, and in the event of any transfer or transfers of the title to such fee Landlord herein named (and, in case of any subsequent transfers or conveyances, the then grantor) will automatically be relieved from and after the date of such transfer or conveyance of all personal liability for the performance of any covenants or obligations on the part of Landlord contained in this Lease thereafter to be performed.

22.6 The term “**Legal Requirements**” means (i) all present and future applicable laws, statutes, treaties, rules, orders, ordinances, codes (including, without limitation, building and life-safety codes), regulations, requirements, permits, and interpretations by, and applicable judgments, decrees, injunctions, writs and like action even if unforeseen or extraordinary of any Governmental Authority (including, without limitation, Environmental Laws (defined herein), laws and regulations pertaining to health and safety, Insolvency Laws (defined herein), the Fair Housing Amendments Act of 1988, the Americans with Disabilities Act of 1990, and any other applicable Federal, State or local statute, law, ordinance, code, rule, regulation, order or decree regulating, relating to, or imposing liability or standards of conduct relating to barrier-free access or access of the handicapped or disabled to the Premises, and laws and regulations pertaining to the construction, restoration, use and operation of schools); and (ii) any reciprocal easement agreement, agreement, contract, instrument, restriction or similar agreement relating to the use, occupancy, possession, operation, alterations, repairs or maintenance of the Premises or otherwise affecting the Premises.

22.7 The term “**mortgage**” means any mortgage, deed of trust, deed to secure debt or other security instrument now existing as, or hereafter becoming a lien on the Premises.

22.8 The term “**mortgagee**” means the Person(s) who is(are) the holder(s) or beneficiary(ies) under any mortgage from time to time.

22.9 The term “**Person**” means any natural person, corporation, limited liability company, trust, joint venture, association, company, partnership, Governmental Authority or other entity.

ARTICLE 23

Subordination; Estoppel Certificates.

23.1 Tenant agrees that Landlord, or any mortgagee or lessor under any applicable ground or other underlying lease, may choose to make this Lease subordinate or paramount to any mortgages or ground or underlying leases now or hereafter affecting the Premises and to any and all advances to be made thereunder or to be secured thereby, and to the interest and charges thereon, and to all renewals, replacements and extensions thereof, and that upon any taking of possession of the Premises and accession to the interest of Landlord under this Lease by such lessor or mortgagee, Tenant shall attorn to and recognize such Person as landlord hereunder; provided

the mortgagee, lessor under any such ground or underlying leases, Landlord or any trustee named in any such mortgages or leases shall agree (i) to recognize the Lease of Tenant in the event of foreclosure if Tenant is not in Default and (ii) that Tenant's possession of the Premises under this Lease shall not be disturbed by such Person unless there is a Default. Tenant will execute promptly any instrument or certificate that Landlord may request to confirm such subordination.

23.2 Tenant, within ten (10) days after request by Landlord, will execute and deliver to Landlord (and any mortgagee or prospective mortgagee, or any current or prospective ground or underlying lessor, to the extent specified by Landlord) an estoppel certificate as to such reasonable facts and circumstances under this Lease as may be requested, but in any case including the following (i) identifying the commencement date and expiration date of this Lease, (ii) stating that this Lease is unmodified and in full force and effect, or is in full force and effect as modified, and then stating such modifications, (iii) stating that Tenant does not claim that Landlord is in default in any way, or listing any such claimed defaults, (iv) the amount of Monthly Installments then payable hereunder and Additional Rent, if any, as of the date of the certificate, (v) the date to which the Rent has been paid in advance, and (vi) the amount of any security deposit or pre-paid Rent. If Tenant fails to deliver the executed certificate to Landlord within the ten (10) day period, Tenant shall be in Default without benefit of any cure period, and the proposed certificate will be conclusively deemed executed by Tenant.

23.3 Upon the receipt of a notice from Landlord, Tenant agrees to pay all such sums owing under this Lease directly to the account or party specified in such notice.

ARTICLE 24

Quiet Enjoyment.

24.1 All times when Tenant is not in Default, Tenant's quiet and peaceable enjoyment of the Premises will not be disturbed or interfered with by Landlord or any Person claiming by, through or under Landlord.

ARTICLE 25

Holding Over.

25.1 Any holdover by Tenant in the Premises beyond the expiration or termination of the Term (other than pursuant to Article 2), shall not be deemed to be a renewal or extension of this Lease or any extension thereof or the exercise of any option to extend or renew this Lease, but said holding over shall be deemed a tenancy from calendar month to calendar month at a monthly Rent equal to two hundred percent (200%) of the Monthly Installment for the last month paid under the Term. A month-to-month tenancy arising by holding over under this Section may be terminated by either Landlord or Tenant giving written notice to the other party hereto on or before the day any Monthly Installment is due with termination becoming effective on the day the next following Monthly Installment would have otherwise become due.

ARTICLE 26

Remedies Not Exclusive; Waiver.

26.1 Each and every of the rights, remedies and benefits provided by this Lease to Landlord are cumulative, and are not exclusive of any other of said rights, remedies and benefits, or of any other rights, remedies and benefits allowed by law.

26.2 One or more waivers of any covenant or condition by Landlord will not be construed as a waiver of a further or subsequent breach of the same covenant or condition, and the consent or approval by Landlord to or of any act by Tenant requiring Landlord's consent or approval will not be deemed to waive or render unnecessary Landlord's consent to or approval of any subsequent similar act by Tenant.

ARTICLE 27

Right To Show Premises.

27.1 Landlord may show the Premises and may display about the Premises signs advertising the availability of the Premises at any time during the Term of this Lease.

ARTICLE 28

Landlord's Liability.

28.1 If Landlord fails to perform any provision of this Lease upon Landlord's part to be performed, and if as a consequence of such default Tenant recovers a money judgment against Landlord, such judgment may be satisfied only out of the proceeds of sale received upon execution of such judgment (subject to any prior mortgages and ground or underlying leases) and levied thereon against the right, title and interest of Landlord in the Premises and out of rents or other income from such property receivable by Landlord, and Landlord shall not be personally liable for any deficiency.

ARTICLE 29

Termination of Services Agreement.

29.1 In the event the Services Agreement is terminated by Landlord or Tenant, as party thereto, (a) due to the default of the other party thereto, then upon the giving of notice as required by this Section, the non-defaulting party for purposes of the Services Agreement may, at its option, terminate this Lease without penalty (except as provided in Section 13.1.D hereof), with the effective date of lease termination being the same as the date on which the Services Agreement terminates, (b) pursuant to any of the termination rights or options provided therein other than those arising in the event of a default or breach by the other party to the Services Agreement, then in any such event and upon the giving of notice as required by this Section, Tenant or Landlord may, at its option, terminate this Lease without penalty, with the effective date of lease termination being the same as the date on which the Services Agreement terminates. To exercise any of the termination rights or options provided in the previous sentence, the party so exercising shall notify

the other party hereto of their exercise of any such lease termination right no later than thirty (30) days after the date on which the notice terminating the Services Agreement is sent.

ARTICLE 30

General.

30.1 References in this Lease to Persons have been generalized for ease of reading. Therefore, references to a single Person will also mean more than one Person whenever such usage is appropriate (for example, “**Tenant**” may include, if appropriate, a group of Persons acting as a single entity, or as tenants-in-common). Similarly, pronouns of any gender should be considered inter-changeable with pronouns of other genders. If a party consists of more than one Person, such Persons shall be jointly and severally liable for the obligations of such party under this Lease.

30.2 Any waiver or waivers by either party of any of the provisions of this Lease will not constitute a waiver of any later breach of that provision, and any consent or approval given by either such party with respect to any act, neglect or default by the other party will not waive or make unnecessary the other party’s consent or approval with respect to any later similar act, neglect or default by such other party.

30.3 In the event any provision contained herein shall be held to be invalid or unlawful for any reason, such provision shall be deemed to be stricken from this Lease, with the understanding that the remaining provisions hereof shall continue to be binding on the parties.

30.4 Topical headings appearing in this Lease are for convenience only. They do not define, limit or construe the contents of any sections, paragraphs or clauses.

30.5 This Lease can be modified or amended only by a written agreement signed by Landlord and Tenant.

30.6 All provisions of this Lease are and will be binding on the heirs, executors, administrators, personal representatives, successors and assigns of each of Landlord and Tenant.

30.7 The laws of the state in which the Premises are located will control in the construction and enforcement of this Lease, without regard to any laws or policies of such state regarding conflicts of law.

30.8 Time is of the essence of all terms and conditions of this Lease.

30.9 Landlord and Tenant each represent and warrant to the other that neither of them has contacted a broker, finder or similar Person in connection with this Lease, and each party shall defend, indemnify and hold the other harmless from and against all liability, cost and expense, including reasonable attorneys’ fees, incurred as a consequence of any claim asserted by a Person alleging to have dealt with one of the parties hereto in connection with this Lease.

[Signatures on Following Page]

IN WITNESS WHEREOF, the parties hereto have executed this Lease as of the day and year first above written.

LANDLORD:

National Heritage Academies, Inc.
a Michigan corporation

By: _____
Its: Chief Financial Officer

TENANT:

Carolina Scholars Academy

By: _____
Its: Board President

DRAFT

EXHIBIT "A"

LEGAL DESCRIPTION OF PREMISES

DRAFT



Appendix A4.3: EMO/CMO Financial History

Carolina Scholars Academy



April 8, 2025

Tykayla Livingston
Board Chair
Carolina Scholars Academy
5488 US 401 N
Louisburg, NC 27549

Re: Carolina Scholars Academy in Franklin County, NC and NHA

Dear Ms. Livingston,

I understand that Carolina Scholars Academy has partnered with National Heritage Academies (“NHA”) prepare an application for a new school to open in 2027. I write this letter to provide history on the financial stability of the organization over the past years.

NHA is an educational management organization that operates 100 schools in 9 states. NHA has been a valued customer of PNC Bank for approximately 25 years. NHA is in good standing and has been for the duration of our relationship. The company currently has a revolving credit facility with the bank. As of this date, availability on the revolving credit facility (low nine-digit figures) is sufficient to ensure the resources are available to meet the commitments to secure a school site, construct or renovate school facilities, and provide for the start-up costs presented in the application.

If I can be of further assistance, please contact me at either jason.manchesky@pnc.com or via phone at 616-771-9184.

Sincerely,

A handwritten signature in black ink that reads "Jay Manchesky".

Jay Manchesky,
Senior Vice President



Appendix 4.4: IRS Form 990

Carolina Scholars Academy

We are contracting with National Heritage Academies (NHA) to partner for the local day-to-day management of Franklin County Charter School. Our Board understands that NHA is a for-profit corporation. They are privately held, and therefore do not submit an IRS Form 990.

Appendix A4.3 – EMO/CMO Financial History details the financial health and stability of NHA.

<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>
Tykayla Livingston –Chair		252-767-6739	elitegeniuscharterschool@gmail.com	Franklin	Kindergarten Instructional Assistant – Laurel Mill Elementary	N/A	No
Unique Traynham – Vice Chair		919-995-2160	utray52@gmail.com	Wake	Housing Inspector – WSP USA Services, Inc.	Basic Law Enforcement Training Certification and Intermediate Law Enforcement Training Certification	No
Christina Gaffney – Treasurer		919-809-3208	christinaallison26@gmail.com	Suffolk	Director of Curriculum and Instruction – Match Middle School	N/A	No
Sierra Brooks – Secretary		843-260-5864	brooks.sierra90@gmail.com	Wake	Science Teacher – North Garner Middle School	Histotechnologist License (HT, ASCP)	No
Amanda Jefferson Lewis – Director		252-430-4475	amandajefferson@icloud.com	Vance	Pre-K Teacher – Franklin County Schools	NC Teaching License (Birth-Kindergarten)	No
Marla Mills-Wilson – Director		919-358-6137	mmillswilson1913@gmail.com	Franklin	Senior Consultant – 4D Molecular Therapeutics	N/A	No

Position	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
Principal		1.0	1.0	1.0	1.0	1.0
Dean(s)		2.0	2.0	2.0	3.0	3.0
Office Staff (registrar, office administrator, admissions representative)		3.0	3.0	3.0	3.0	3.0
Core Classroom Teachers		19.0	22.0	25.0	28.0	28.0
Specialized Classroom Teachers (special education, ELL, specials)		9.0	10.0	11.0	12.0	12.0
Student Support Positions (behavior specialist, social workers, etc.)		0.8	0.9	0.9	0.9	0.9
Interventionists		2.6	3.5	3.5	3.5	3.5
Substitute Teachers		1.0	1.2	1.3	1.4	1.4
Teaching Aides or Assistants		3.5	3.5	3.5	4.4	4.4
School Operations Support Staff (recess aides)		1.0	1.0	1.0	1.0	1.0



Appendix L: Insurance Quotes

Carolina Scholars Academy



Arthur J. Gallagher & Co.
BUSINESS WITHOUT BARRIERS™

April 8, 2025

Carolina Scholars Academy
(Franklin County)

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

Type of Coverage	Coverage Amount	Estimated Premiums
Comprehensive General Liability (including personal/bodily injury) {based on 1,000 students}	\$1,000,000 per occurrence. \$2,000,000 aggregate	\$12,970
Errors & Omissions - Directors, Officers, School Leaders {based on 1,000 students}	\$1,000,000 per occurrence. \$3,000,000 aggregate	\$2,750
Property (content coverage) Special Form, Replacement Cost	\$25,000	\$50
Motor Vehicle Liability (hired, not owned)	\$1,000,000	\$250
Crime	\$500,000	\$250
Workers Compensation {based on \$5,000,000 in Payroll}	Statutory Coverage per the laws of North Carolina	\$14,000
Umbrella (for excess over CGL, Auto, E&O, Employers' Liability, etc.)	\$15,000,000	\$6,900

After you have reviewed this letter should you have any questions or comments, please do not hesitate to call. My direct Number is 727-796-6226 and my email address is Todd.Caton@ajg.com.

Sincerely,

Todd Caton, CLCS, SBSCS

Senior Client Service Manager



Appendix M: Revenue Assurances

Carolina Scholars Academy



April 11, 2025

Tykayla Livingston
Board Chair
Carolina Scholars Academy

Via: Hand Delivery

Re: Letter of Financial Commitment

Dear Ms. Livingston,

National Heritage Academies (NHA) is proud and privileged to partner with you to provide a quality public charter school choice to families and students in Franklin County through the proposal for Carolina Scholars Academy. As you know, NHA currently partners with 100 school boards across nine states to provide excellent K-12 public charter school choices to thousands of families and students. This includes fifteen other schools in North Carolina, with a sixteenth school set to open in the fall. Through this experience we know that a major success factor for any school, and especially any charter school, is appropriate fiduciary oversight and planning.

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

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

Sincerely,

A handwritten signature in black ink, appearing to read "Bob Owen", written in a cursive style.

Bob Owen
Chief Financial Officer
National Heritage Academies

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

If applying as 'Statewide Virtual', select 1000-Statewide Avg as LEA 1 only. If applying as 'Regional Virtual', select a maximum of 3 LEAs. 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:

What percentage of students from

LEA #2:

What percentage of students from

LEA #3:

What percentage of students from

Grade	Year 1			Year 2			
	LEA #1	LEA #2	LEA #3	LEA #1	LEA #2	LEA #3	LEA #1
	350	920		350	920		350
Kindergarten	90	10		90	10		90
Grade 1	76	8		76	8		76
Grade 2	76	8		76	8		76
Grade 3	76	8		76	8		76
Grade 4	76	8		76	8		76
Grade 5	76	8		76	8		76
Grade 6				76	8		76
Grade 7							76
Grade 8							
Grade 9							
Grade 10							
Grade 11							
Grade 12							
LEA Totals:	468	52	0	546	58	0	622

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.

imum of three LEAs.
icular level.

the LEA selected above will qualify for EC funding?	14%
---	-----

the LEA selected above will qualify for EC funding?	14%
---	-----

the 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
920		350	920		350	920	
10		90	10		90	10	
8		76	8		76	8	
8		76	8		76	8	
8		76	8		76	8	
8		76	8		76	8	
8		76	8		76	8	
8		76	8		76	8	
8		76	8		76	8	
8		76	8		76	8	
		76	8		76	8	
66	0	698	74	0	698	74	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:		350-Franklin		
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds	\$7,018.16	468	\$3,284,498.88	
Local Funds	\$2,773.79	468	\$1,298,133.72	
State EC Funds	\$5,365.09	60	\$320,134.92	
Federal EC Funds	\$1,514.35	60	\$90,361.26	
			Total:	\$4,993,128.78

LEA #2:		920-Wake		
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds	\$6,431.32	52	\$334,428.64	
Local Funds	\$3,966.00	52	\$206,232.00	
State EC Funds	\$5,309.31	7	\$35,200.73	
Federal EC Funds	\$1,514.35	7	\$10,040.14	
			Total:	\$585,901.51

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 may need to contact their local offices or LEA.

Income: Revenue Projections	Year 1	Year 2	Year 3	Year 4
State ADM Funds	\$ 3,618,928	\$ 4,204,932	\$ 4,789,763	\$ 5,374,593
Local Per Pupil Funds	\$ 1,504,366	\$ 1,744,517	\$ 1,987,053	\$ 2,229,589
State EC Funds	\$ 355,336	\$ 412,753	\$ 470,156	\$ 527,560
Federal EC Funds	-	\$ 100,401	\$ 132,839	\$ 149,057
Other Funds*	\$ 1,470,747	\$ 718,366	\$ 289,200	\$ 261,071
Working Capital*				
TOTAL REVENUE:	\$ 6,949,376	\$ 7,180,969	\$ 7,669,011	\$ 8,541,871

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

Assurances are needed to confirm the commitment of these additional sources of revenue. Please include these as Appendix



on federal funding in

Year 5	
\$	5,374,593
\$	2,229,589
\$	527,560
\$	149,057
\$	375,549
\$	8,656,349

*Additional questions by
creating budget, please
these funds. If these*

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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	1.00	\$ 134,100	\$ 134,100	1.00	\$ 138,100	\$ 138,100	1.00	\$ 142,200	\$ 142,200	1.00	\$ 146,500	\$ 146,500	1.00	\$ 150,900	\$ 150,900
Assistant Administrator			\$ -			\$ -			\$ -			\$ -			\$ -
Finance Officer			\$ -			\$ -			\$ -			\$ -			\$ -
Clerical	1.00	\$ 30,700	\$ 30,700	1.00	\$ 31,600	\$ 31,600	1.00	\$ 32,500	\$ 32,500	1.00	\$ 33,500	\$ 33,500	1.00	\$ 34,500	\$ 34,500
Food Service Staff			\$ -			\$ -			\$ -			\$ -			\$ -
Custodians			\$ -			\$ -			\$ -			\$ -			\$ -
Transportation Staff			\$ -			\$ -			\$ -			\$ -			\$ -
Deans	2.00	\$ 68,900	\$ 137,800	2.00	\$ 71,000	\$ 142,000	2.00	\$ 73,100	\$ 146,200	3.00	\$ 75,300	\$ 225,900	3.00	\$ 77,600	\$ 232,800
Registrar	1.00	\$ 52,300	\$ 52,300	1.00	\$ 53,900	\$ 53,900	1.00	\$ 55,500	\$ 55,500	1.00	\$ 57,200	\$ 57,200	1.00	\$ 58,900	\$ 58,900
Admissions Representative	1.00	\$ 53,400	\$ 53,400	1.00	\$ 55,000	\$ 55,000	1.00	\$ 56,700	\$ 56,700	1.00	\$ 58,400	\$ 58,400	1.00	\$ 60,200	\$ 60,200
*** Edit text as needed. ***			\$ -			\$ -			\$ -			\$ -			\$ -
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Total Admin and Support:	6		\$ 408,300	6		\$ 420,600	6		\$ 433,100	7		\$ 521,500	7		\$ 537,300
Instructional Personnel															
Core Content Teacher(s)	19.00	\$ 59,900	\$ 1,138,100	22.00	\$ 61,700	\$ 1,357,400	25.00	\$ 63,600	\$ 1,590,000	28.00	\$ 65,500	\$ 1,834,000	28.00	\$ 67,500	\$ 1,890,000
Electives/Specialty Teacher(s)	4.00	\$ 59,900	\$ 239,600	4.00	\$ 61,700	\$ 246,800	4.00	\$ 63,600	\$ 254,400	4.00	\$ 65,500	\$ 262,000	4.00	\$ 67,500	\$ 270,000
Exceptional Children Teacher(s)	4.00	\$ 59,900	\$ 239,600	5.00	\$ 61,700	\$ 308,500	6.00	\$ 63,600	\$ 381,600	7.00	\$ 65,500	\$ 458,500	7.00	\$ 67,500	\$ 472,500
Instructional Support			\$ -			\$ -			\$ -			\$ -			\$ -
Teacher Assistants	3.50	\$ 23,700	\$ 82,950	3.50	\$ 24,400	\$ 85,400	3.50	\$ 25,100	\$ 87,850	4.38	\$ 25,900	\$ 113,313	4.38	\$ 26,700	\$ 116,813
English Language Learner Teachers	1.00	\$ 59,900	\$ 59,900	1.00	\$ 61,700	\$ 61,700	1.00	\$ 63,600	\$ 63,600	1.00	\$ 65,500	\$ 65,500	1.00	\$ 67,500	\$ 67,500
Interventionists	2.63	\$ 23,700	\$ 62,213	3.50	\$ 24,400	\$ 85,400	3.50	\$ 25,100	\$ 87,850	3.50	\$ 25,900	\$ 90,650	3.50	\$ 26,700	\$ 93,450
Substitute Teachers	1	\$ 35,300	\$ 35,300	1.15	\$ 36,400	\$ 41,860	1.25	\$ 37,500	\$ 46,875	1.4	\$ 38,600	\$ 54,040	1.4	\$ 39,800	\$ 55,720
Social Worker	0.80	\$ 51,500	\$ 41,200	0.90	\$ 53,000	\$ 47,700	0.90	\$ 54,600	\$ 49,140	0.90	\$ 56,200	\$ 50,580	0.90	\$ 57,900	\$ 52,110
Recess Aides	1.00	\$ 14,300	\$ 14,300	1.00	\$ 14,700	\$ 14,700	1.00	\$ 15,100	\$ 15,100	1.00	\$ 15,600	\$ 15,600	1.00	\$ 16,100	\$ 16,100
Total Instructional Personnel:	36.925		\$ 1,913,163	42.05		\$ 2,249,460	46.15		\$ 2,576,415	51.175		\$ 2,944,183	51.175		\$ 3,034,193
Total Admin, Support and Instructional Personnel:	42.925		\$ 2,321,463	48.05		\$ 2,670,060	52.15		\$ 3,009,515	58.175		\$ 3,465,682.50	58.175		\$ 3,571,493

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	6.00	\$ 11,400	\$ 68,400	6	\$ 11,600	\$ 69,600	6	\$ 11,800	\$ 70,800	7	\$ 12,000	\$ 84,000	7	\$ 12,200	\$ 85,400
Retirement Plan--NC Slate		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Retirement Plan--Other	6	\$ 1,310	\$ 7,860	6	\$ 1,345	\$ 8,070	6	\$ 1,395	\$ 8,370	7	\$ 1,440	\$ 10,080	7	\$ 1,485	\$ 10,395
Life Insurance		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Disability		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Medicare	6	\$ 805	\$ 4,830	6	\$ 830	\$ 4,980	6	\$ 860	\$ 5,160	7	\$ 885	\$ 6,195	7	\$ 915	\$ 6,405
Social Security	6	\$ 3,365	\$ 20,190	6	\$ 3,470	\$ 20,820	6	\$ 3,610	\$ 21,660	7	\$ 3,730	\$ 26,110	7	\$ 3,840	\$ 26,880
Dental Insurance	6	\$ 780	\$ 4,680	6	\$ 795	\$ 4,770	6	\$ 810	\$ 4,860	7	\$ 825	\$ 5,775	7	\$ 840	\$ 5,880
Life & Disability Insurance	6	\$ 30	\$ 180	6	\$ 35	\$ 210	6	\$ 35	\$ 210	7	\$ 35	\$ 245	7	\$ 35	\$ 245
Workers' Compensation	6	\$ 165	\$ 990	6	\$ 170	\$ 1,020	6	\$ 175	\$ 1,050	7	\$ 180	\$ 1,260	7	\$ 185	\$ 1,295
FUTA & SUTA	6	\$ 360	\$ 2,160	6	\$ 370	\$ 2,220	6	\$ 385	\$ 2,310	7	\$ 395	\$ 2,765	7	\$ 410	\$ 2,870
Tuition Reimbursement	6	\$ 270	\$ 1,620	6	\$ 270	\$ 1,620	6	\$ 270	\$ 1,620	7	\$ 270	\$ 1,890	7	\$ 270	\$ 1,890
Total Admin and Support Benefits:			\$ 110,910			\$ 113,310			\$ 116,040			\$ 138,320			\$ 141,260
Instructional Personnel Benefits															
Health Insurance	35.925	\$ 11,400	\$ 409,545	41.05	\$ 11,600	\$ 476,180	45.15	\$ 11,800	\$ 532,770	50.175	\$ 12,000	\$ 602,100	50.175	\$ 12,200	\$ 612,135
Retirement Plan--NC Slate		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Retirement Plan--Other	35.925	\$ 1,310	\$ 47,062	41.05	\$ 1,345	\$ 55,212	45.15	\$ 1,395	\$ 62,984	50.175	\$ 1,440	\$ 72,252	50.175	\$ 1,485	\$ 74,510
Social Security	36.925	\$ 3,365	\$ 124,253	42.05	\$ 3,470	\$ 145,914	46.15	\$ 3,610	\$ 166,602	51.175	\$ 3,730	\$ 190,883	51.175	\$ 3,840	\$ 196,512
Disability		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Medicare	36.925	\$ 805	\$ 29,725	42.05	\$ 830	\$ 34,902	46.15	\$ 860	\$ 39,689	51.175	\$ 885	\$ 45,290	51.175	\$ 915	\$ 46,825
Life Insurance		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Dental Insurance	35.925	\$ 780	\$ 28,022	41.05	\$ 795	\$ 32,635	45.15	\$ 810	\$ 36,572	50.175	\$ 825	\$ 41,394	50.175	\$ 840	\$ 42,147
Life and Disability Insurance	35.925	\$ 30	\$ 1,078	41.05	\$ 35	\$ 1,437	45.15	\$ 35	\$ 1,580	50.175	\$ 35	\$ 1,756	50.175	\$ 35	\$ 1,756
Workers' Compensation	35.925	\$ 165	\$ 5,928	41.05	\$ 170	\$ 6,979	45.15	\$ 175	\$ 7,901	50.175	\$ 180	\$ 9,032	50.175	\$ 185	\$ 9,282
FUTA & SUTA	36.925	\$ 360	\$ 13,293	42.05	\$ 370	\$ 15,559	46.15	\$ 385	\$ 17,768	51.175	\$ 395	\$ 20,214	51.175	\$ 410	\$ 20,982
Tuition Reimbursement	35.925	\$ 270	\$ 9,700	41.05	\$ 270	\$ 11,084	45.15	\$ 270	\$ 12,191	50.175	\$ 270	\$ 13,547	50.175	\$ 270	\$ 13,547
Total Instructional Personnel Benefits:			\$ 668,604			\$ 779,899			\$ 878,056			\$ 996,468			\$ 1,017,697
Total Personnel Benefits:			\$ 779,514			\$ 893,209			\$ 994,096			\$ 1,134,788			\$ 1,158,957
Total Admin & Support Personnel (Salary & Benefits):	6		\$ 519,210	6		\$ 533,910	6		\$ 549,140	7		\$ 659,820.00	7		\$ 678,560
Total Instructional Personnel (Salary & Benefits):	36.925		\$ 2,581,766	42.05		\$ 3,029,359	46.15		\$ 3,454,471	51.175		\$ 3,940,651	51.175		\$ 4,051,889
TOTAL PERSONNEL:	42.925		\$ 3,100,976	48.05		\$ 3,563,269	52.15		\$ 4,003,611	58.175		\$ 4,600,471	58.175		\$ 4,730,449

*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	\$ 24,000.00	\$ 14,200.00	\$ 16,100.00
Paper	\$ -	\$ -	\$ -
Computers & Software	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
Communications & Telephone			
Copier leases			
Other	\$ 3,900.00	\$ 4,000.00	\$ 4,100.00
Office Equipment	\$ 12,300.00	\$ 14,340.25	\$ 16,520.25
Management Company			
Contract Fees			
Other			
*** Insert rows and edit text as needed. ***			
Professional Contract			
Legal Counsel	\$ 15,000.00	\$ 16,500.00	\$ 15,000.00
Student Accounting			
Financial	\$ 131,900.00	\$ 133,200.00	\$ 134,100.00
Other			
*** Insert rows and edit text as needed. ***			
Facilities			
Facility Lease/Mortgage	\$ 1,125,000.00	\$ 1,125,000.00	\$ 1,125,000.00
Maintenance	\$ 149,600.00	\$ 139,400.00	\$ 132,400.00
Contracted Services	\$ 10,300.00	\$ 3,300.00	\$ 3,400.00
Custodial Contract	\$ 178,600.00	\$ 182,200.00	\$ 185,900.00
Insurance (pg19)	\$ 30,200.00	\$ 30,800.00	\$ 31,400.00
Supplies	\$ 15,700.00	\$ 6,800.00	\$ 7,000.00
Rent of Equipment	\$ 14,200.00	\$ 14,359.75	\$ 14,479.75
Utilities			
Electric	\$ 76,100.00	\$ 77,900.00	\$ 79,600.00
Gas	\$ 1,700.00	\$ 1,700.00	\$ 1,700.00
Water/Sewer	\$ 7,200.00	\$ 7,200.00	\$ 7,200.00
Trash	\$ 8,600.00	\$ 8,600.00	\$ 8,600.00
Internet Service	\$ 700.00	\$ 700.00	\$ 800.00

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

Transportation

Buses

Gas

Oil/Tires & Maintenance

Other

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

\$ 34,200.00	\$ 35,200.00	\$ 36,200.00

Other

Marketing

Child nutrition

Travel

Other

Administrative Support

Facilities Acquisition

Partner Relations

Board Expenditures

Total Administrative & Support Operations:

\$ 321,700.00	\$ 172,400.00	\$ 172,900.00
\$ 187,700.00	\$ 219,800.00	\$ 253,300.00
\$ 14,700.00	\$ 16,300.00	\$ 17,500.00
\$ 6,000.00	\$ 6,200.00	\$ 6,400.00
\$ 117,900.00	\$ 119,800.00	\$ 121,400.00
\$ 178,800.00	\$ 96,500.00	\$ 9,700.00
\$ 46,700.00	\$ 47,000.00	\$ 47,200.00
\$ 35,000.00	\$ 35,000.00	\$ 35,000.00
\$ 2,749,700.00	\$ 2,530,400.00	\$ 2,484,900.00

OPERATIONS BUDGET: Instructional		Year 1	Year 2	Year 3
Classroom Technology				
Software (LMS, SIS, etc.)	\$	5,400.00	\$ 5,900.00	\$ 6,500.00
Technology Services	\$	188,200.00	\$ 204,700.00	\$ 221,800.00
Wifi Access (Remote Applicants ONLY)				
Other				
Instructional Contract				
Staff Development	\$	57,900.00	\$ 61,600.00	\$ 65,200.00
Staff Recruitment & Retention	\$	109,400.00	\$ 126,500.00	\$ 144,000.00
Special Education Services	\$	212,400.00	\$ 254,300.00	\$ 275,100.00
Curriculum Development & Intervention Svcs	\$	51,800.00	\$ 60,000.00	\$ 68,300.00
Books and Supplies				
Instructional Materials	\$	78,700.00	\$ 82,000.00	\$ 86,300.00
Curriculum/Texts	\$	214,600.00	\$ 107,000.00	\$ 123,500.00
Copy Paper	\$	16,500.00	\$ 19,500.00	\$ 22,200.00
Testing Supplies	\$	39,100.00	\$ 40,600.00	\$ 41,900.00
Instructional Equipment	\$	121,300.00	\$ 121,300.00	\$ 121,300.00
Field Trips	\$	3,400.00	\$ 3,900.00	\$ 4,400.00
Total Instructional Operations:	\$	1,098,700.00	\$ 1,087,300.00	\$ 1,180,500.00
TOTAL OPERATIONS:				
	\$	3,848,400.00	\$ 3,617,700.00	\$ 3,665,400.00

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

Year 4	Year 5
\$ 18,200.00	\$ 18,500.00
\$ -	\$ -
\$ 2,000.00	\$ 2,000.00
\$ 4,200.00	\$ 4,300.00
\$ 18,700.25	\$ 19,000.25
\$ 16,500.00	\$ 15,000.00
\$ 148,400.00	\$ 139,000.00
\$ 1,125,000.00	\$ 1,125,000.00
\$ 164,000.00	\$ 201,000.00
\$ 3,500.00	\$ 3,500.00
\$ 189,600.00	\$ 193,400.00
\$ 32,000.00	\$ 32,600.00
\$ 7,100.00	\$ 7,200.00
\$ 14,599.75	\$ 14,599.75
\$ 81,400.00	\$ 83,100.00
\$ 1,700.00	\$ 1,700.00
\$ 7,200.00	\$ 7,200.00
\$ 8,600.00	\$ 8,600.00
\$ 800.00	\$ 800.00

\$ 37,300.00	\$ 38,400.00
\$ 183,300.00	\$ 176,100.00
\$ 288,000.00	\$ 293,800.00
\$ 19,800.00	\$ 20,000.00
\$ 6,500.00	\$ 6,600.00
\$ 136,600.00	\$ 126,700.00
\$ 10,900.00	\$ 10,100.00
\$ 56,800.00	\$ 48,800.00
\$ 35,000.00	\$ 35,000.00
\$ 2,617,700.00	\$ 2,632,000.00

Year 4		Year 5	
\$	7,100.00	\$	7,200.00
\$	240,700.00	\$	244,400.00
\$	70,400.00	\$	69,200.00
\$	178,100.00	\$	165,900.00
\$	319,800.00	\$	326,500.00
\$	85,100.00	\$	78,900.00
\$	90,000.00	\$	91,400.00
\$	134,300.00	\$	114,200.00
\$	25,100.00	\$	25,600.00
\$	46,800.00	\$	44,200.00
\$	121,300.00	\$	121,300.00
\$	5,000.00	\$	5,100.00
\$	1,323,700.00	\$	1,293,900.00


\$	3,941,400.00	\$	3,925,900.00
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Overall Budget

SUMMARY	Logic	Year 1	Year 2	Year 3	Year 4	Year 5
Total Personnel	J	\$ 3,100,976.13	\$ 3,563,269.25	\$ 4,003,611.00	\$ 4,600,470.50	\$ 4,730,449.00
Total Operations	M	\$ 3,848,400.00	\$ 3,617,700.00	\$ 3,665,400.00	\$ 3,941,400.00	\$ 3,925,900.00
Total Expenditures	N = J + M	\$ 6,949,376.13	\$ 7,180,969.25	\$ 7,669,011.00	\$ 8,541,870.50	\$ 8,656,349.00
Total Revenue	Z	\$ 6,949,376.13	\$ 7,180,969.25	\$ 7,669,011.00	\$ 8,541,870.50	\$ 8,656,349.00
Surplus / (Deficit)	= Z - N	\$ 0.00	\$ 0.00	\$ (0.00)	\$ 0.00	\$ 0.00

Signature Page

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

Print/Type Name: Tykayla Livingston
Board Position: President
Signature: 
Date: 7-8-25

Sworn to and subscribed before me this 8th day of April, 20 25.

Notary Public: Ashley R Hawkins Official Seal:

My commission expires: 12/7, 20 28.

