



## **NORTH CAROLINA CHARTER SCHOOL APPLICATION**

# Lakehaven Academy

**Public charter schools opening the fall of 2014**

**See Resource Manual for Assistance  
(Available late November 2012)**

**Due by 12:00 noon, March 1, 2013**

North Carolina Department of Public Instruction  
NCDPI/Office of Charter Schools  
301 N. Wilmington Street  
Raleigh NC 27601-2825  
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6303 Mail Service Center  
Raleigh, NC 27699-6303

## CHARTER SCHOOL

### 2013 Application Process

#### To open a charter school in the 2014-2015 school year

#### APPLICATION DUE DATE/TIME

##### January 4, 2013

A letter of intent to apply for the 2014-2015 school year **must** be received in the Office of Charter Schools **no later than 12:00 noon**. If the Letter of Intent is not submitted, an application from this group will not be accepted. You can find the Letter of Intent requirements on the NC Office of Charter School web site.

##### March 1, 2013

A complete application package, one (1) single-sided, signed, and notarized original hard copy, one (1) PDF electronic version of the narrative, and one (1) PDF electronic version of the appendices (i.e. labeled flash drive) must be received in the Office of Charter Schools **by 12:00 noon**.

##### March 8, 2013

A copy of the application due to the Local Education Agency in which the proposed charter school will reside in. Applicant must provide evidence to the Office of Charter Schools (i.e. signed letter).

#### APPLICATION SPECIFICATIONS

Applicants **MUST** submit applications prior to the deadline March 1, 2013 at 12:00 noon; applicants are to use the following specifications:

1. All elements of the proposal must be typed with 1-inch page margins and 12-point font, single-spaced, in Times New Roman font.
2. Each major section (Mission, Purposes and Goals, Education Plan, Governance, Operations and Capacity, and Financial Plan) must begin on a separate page, as indicated in the template document. Do not exceed 50 pages for the proposal narrative. (Title Page, Table of Contents, and Appendices are not included in the narrative page limit.)
3. If a particular question does not apply to your team or proposal, **keep the section heading**, respond "Not Applicable," AND state the reason this question is not applicable to your team or proposal. The questions may be deleted.
4. All narrative content pages should be numbered and the name of school should appear at the top of ALL pages
5. All required Appendices should be clearly titled and include page numbers (i.e. Appendix A and page numbers as- A1, A2, B1...).
6. Review all elements of your application for completeness before submitting. An incomplete application may result in the elimination of the application.
7. Late submissions will not be accepted. No exceptions.
8. Provide confirmation to the Office of Charter Schools that within seven (7) days the applicant has provided one full copy of the application to the LEA in which the proposed charter school will be located.

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**I. APPLICATION CONTACT INFORMATION**

Name of proposed charter school: Lakehaven Academy

Has the organization applied for 501(c)(3) non-profit status: Yes  No

Name of non-profit organization under which charter will be organized or operated: *EduCreate, Inc.*

Provide the name of the person who will serve as the primary contact for this Application. The primary contact should serve as the contact for follow-up, interviews, and notices regarding this Application.

Name of contact person: *Stacy Remy*

Title/Relationship to nonprofit: *contact person/co-founder of EduCreate, Inc.*

Mailing address: 9025 Scottsboro Dr  
Huntersville NC 28078

Primary telephone: 704-490-3051 Alternative telephone: 704-490-3051

E-Mail address: *csremy@roadrunner.com*

Name of county and local education agency (LEA) in which charter school will reside:

County: MECKLENBURG

LEA: 600-Charlotte-Mecklenburg Schools

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

No:

Yes:

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

No:

Yes:

What is the name of the nonprofit organization that governs this charter school? *EduCreate, Inc.*

**Grade Levels Served and Total Student Enrollment:**

Projected School Opening: Year 2014 Month September

Will this school operate on a year round schedule?

No:

Yes:

*Proposed Grade Levels Served and Total Student Enrollment (10 Years)*

<b>Academic School Year</b>	<b>Grade Levels</b>	<b>Total Projected Student Enrollment</b>
First Year	06,07	45
Second Year	01,02,03,04,05,06,07,08	115
Third Year	01,02,03,04,05,06,07,08	140
Fourth Year	01,02,03,04,05,06,07,08	150

Fifth Year	01,02,03,04,05,06,07,08	150
Sixth Year	01,02,03,04,05,06,07,08	150
Seventh Year	01,02,03,04,05,06,07,08	150
Eight Year	01,02,03,04,05,06,07,08	150
Ninth Year	01,02,03,04,05,06,07,08	150
Tenth Year	01,02,03,04,05,06,07,08	150

*The State Board of Education provides funds to charter schools, approves the original members of the boards of directors of the charter schools, has the authority to grant, supervise, and revoke charters, and demands full accountability from charter schools for school finances and student performance.*

*I certify that I have the authority to submit this application and that the founding board members and I were regularly involved in the development of this application. All information contained herein is complete and accurate. I realize that any misrepresentation could result in disqualification from the application process or revocation after award. I understand that incomplete applications may not be considered. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the applicant.*

lakehavenacademy  
*Signature*

board member  
*Title*

lakehavenacademy  
*Printed Name*

02/27/2013  
*Date*

## II. MISSION and PURPOSES

(No more than three total pages in this section)

### Mission:

*State the Mission of the proposed charter school in **one hundred words or less**. The mission statement defines the organization's purpose and primary objectives, describing why it exists. The mission statement provides the foundation for the entire proposal.*

*The mission statement of the proposed charter school is as follows:*

Lakehaven Academy is a preparatory school for life, offering a personalized curricular program through which students will have the opportunity to advance according to their abilities, interests, and motivation and in cooperation with their peers. With the guidance of experienced and highly knowledgeable faculty and staff, our students will participate in an intellectually stimulating environment which combines cooperative, pro-social learning with challenging, interdisciplinary studies which are strong in academic content and infused with the Arts.

### Educational need and Targeted Student Population of the Proposed Charter School:

- 1. Provide a description of 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. Describe the rationale for selecting the location and student body.*

Our targeted population will include students from many socio-economic levels, cultural backgrounds, and abilities/interests. In addition to targeting students who have previously attended the partnering private school, we intend to actively recruit in the apartment complexes nearby, which have a high population of ELL students and families. We intent to naturally attract diversity through the universality of our common-sense, clear approach to delivering an education plan which can work for all students, regardless of their socioeconomic background, race, gender, cultural heritage, disability, or any other factor which contributes to who they are as a person. Huntersville, a suburban area, is quickly becoming a more diverse population in terms of socioeconomic status, and we will strive to attract students from all walks of life. Due to the location of the school, we anticipate attracting students from all socioeconomic backgrounds, and we welcome this opportunity.

- 2. What will be the projected enrollment at the charter school and what percentage of the Average Daily Membership (ADM) does that reflect for the local LEA(s) that may be impacted?*

We plan to start small in order to establish and effectively execute and manage our plans and procedures. By starting conservatively, we will not significantly impact from a numeric standpoint the local LEA's, which includes other charters and private schools in addition to 2 large public school systems; however, because we are all inclusive and targeting ELL's in particular, we can anticipate gaining some additional federal funding as appropriate (i.e. Title III ) which may not significantly impact our nearby schools whose percentage of LEP students is relatively low in comparison with other schools, located closer to the city, within our district. In our

inaugural year, we anticipate that our enrollment for 6th and 7th grade will be 45 and would estimate that at least ten percent of those students as well as of those in subsequent years as the elementary program develops would be eligible to be tested for potential English Language Learner classification. 45 students represents We would seek to market and recruit in order to increase that number. We could anticipate some special needs students, estimated ten percent, who would qualify for Exceptional Childrens' services. We anticipate attracting families with bicultural backgrounds due to the strong global component of our program. As of the writing of this proposal, the growth of the school is indicated as starting with the establishment of a middle school. A high school expansion opportunity is highly possible; however it is not represented in this model as it would not occur prior to year 3. As our program develops and our students show documented academic achievement and growth, we would reapply to the state to amend our proposal, including more detailed plans for the high school expansion (including funding and facility development plans). Since we are not currently formally proposing that option, we have not factored it in the application at this time.

*3. Explain how the charter school's education plan will compare to or differ from that of the local LEA(s).*

Lakehaven Academy will incorporate best practices in education and will compare to CMS in that respect. We will respect and adhere to all laws as well as give careful consideration to recommendations from federal and state entities with expertise pertaining to best practices in student learning, as well as reviewing and consulting when necessary the most current research available and the educators who study and practice said research.

Our plan is to take individualized education and interthematic, project-based curriculum design and lesson construction to an unprecedented level in our goal of making learning meaningful and relevant to our students. We as professional educators and leaders (in title and in daily practice) have proven track records of establishing and maintaining growth in our students' learning (showing gains individually and at the school level). Within the context of a small community of committed faculty and staff, we will welcome the flexibility to make decisions quickly and thoughtfully in order to positively impact our students' learning and educational experiences, and indirectly, their lives.

*4. In the appendices (Appendix A), 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).*

**Purposes of the Proposed Charter School:** *In one page or less, describe how the proposed charter school will achieve one or more of the six legislated purposes, as specifically addressed in the NC charter school statute GS 115C-238.29A, and the proposed school's operations.*

*The Six Legislative Purposes of a Charter School are:*

- 1. Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site.*
- 2. Hold schools accountable for meeting measurable student achievement results.*

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

Our charter school is designed to meet and exceed every level of the Six Legislative Purposed of a Charter School. We seek to establish a group of highly-qualified, committed, and dynamic group of individuals who understand and believe in our educational vision for our community and will treat them accordingly through our cooperative planning and work structure (co-teaching, group planning- interthematically and vertically), the establish of significant avenues for input regarding the issues that affect the school, classrooms, and students. we will offer a salary and benefits plan which compensates teachers for the hard work they put in, recognizing that a commitment to teaching is oftern a 24/7, 365 day pursuit. With such individuals in place, we will strive to provide an educational environment in which our students will not only learn, but will love learning. Partnering with their parents and caregivers, we will actively seek (through programming, coursework, clubs, intervention if and when necessary)to help them in all aspects of their development, which includes academic, social, physical, emotional aspects of their person and character. We will establish a school that reflects life, instilling not only facts and basic knowledge of curriculum, but instilling the processes of thinking and deriving meaning and understanding (both personally and pedagogically), synthesis of learning, and consequent implications and applications of such skills to real-life.

Concretely:

1. Individualized teacher-based professional development- in-house when possible. Teachers will be encouraged to seek out opportunities for professional growth whcih directly impact themselves and their students. We anticipate and expect much collegial sharing among our staff, regardless of title or position. Everyone hired will be wering many different hats and bringing lots of varied expertise to the table, so to speak.

2. Our common guiding principles and philosophies will guide our practice and decision-making. Our staff, although experts in their fields, will also make decisions with the whole child in mind. We will maintain our position that all students can learn and will develop a personalized educational plan for each student in our community. Teachers (as a team) will be accountable for showing the growth and learning in all aspects that is being achieved by their students, both quantitatively and qualitatively. We will use efficient, yet effective tools toward monitoring that growth from a baseline point (for example, technology-based dignostic and assment programs, project-based opportunities, end-of-grade tests, anecdotal notes and observations from faculty and staff.)

### **Goals for the Proposed Charter School:**

1. *How will the governing board know that the proposed public charter school has attained their*



*mission statement? What metrics will be used to gauge that success, and how often will the metrics be reviewed in your analysis?*

We will do frequent check-in with the school community- annual staff surveys to assess working conditions/job satisfaction/areas for improvement and consider thoughtfully the feedback ascertained. The board will actively communicate with the Head of School, which will include a report from said administrator at each monthly board meeting. We will establish avenues for communication among all entities of the community- staff, students, parents, surrounding community, and the board will have access to all such communication. We will have an annual retreat to increase and maintain communication as well as to assess together and individually the process of what we're doing, to assess our performance as a board, and make decisions to take action as necessary. We will be frequently assessing the progress of our students in term of academic data, as well as taking into consideration qualitative data relative to the experience of themselves and their families, taking into careful consideration their quality of life at school, suggested areas for improvement, etc. Effective communication will be a critical factor for the board and throughout the entire community; in fact, a significant aspect of our mission will be to ensure that we have established a clear vision and have communicated it effectively and in such a way that our stakeholders understand it, believe in it, and can communicate it effectively, too. We will establish surveys and communication channels to facilitate open communication and opportunities to give feedback on the part of the stakeholders.

- 2. Provide specific and measurable student achievement performance goals for the school's educational program and the method of demonstrating that students have attained the skills and knowledge specified for those goals. These goals should include specific and measurable performance objectives over the first five years of the schools existence.*

Baseline scores through testing data (EOG, EOC) will be established. A writing assessment will be administered annually (could be obtained through authentic writing activities in the classroom and the student will have an opportunity for input on this) An electronic portfolio (growth plan) will be established for each student and that student will have opportunities to maintain their plan/portfolio as necessary along with faculty advisors. Not only will staff be able to show and prove growth in subject areas, but through a focus on metacognition, the students will be active in the conversation about their learning and growth as well. Teachers will have some say in what methods and materials they use to show and record data, provided that they can explain and defend a clear and strong rationale and that their documentation is effective, accurate, reflective of the day to day activities in the classroom, and an authentic representation of the students' learning experiences within the classroom and school.

### III. EDUCATION PLAN

(No more than ten total pages in this section)

**NOTE:** *All sections of the Education Plan should align with all other sections of this application. The State Board of Education shall give priority consideration to the applicants who demonstrate potential for significant, meaningful innovation in education. Provide precise and clear explanations. Lack of response to any question or proper documentation could deem the application incomplete.*

#### **Instructional Program:**

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.

Our founding principle and core strategy will be to teach and to meet the needs of each student in our community in a highly individualized way. Towards this end, we will take a case study approach to each of children (and families). We will use a core curriculum which satisfies and exceeds the requirements set forth in the North Carolina Common Core curriculum, and yet will support and supplement that curriculum by implementing a variety of teaching methods, innovative planning and curriculum design, and diverse teaching materials. We will develop a plan for each individual who attends our school, and maintain a reformance record for each student accordingly. Our instructional methods will be as diverse as our hiring practices; in other words, we will actively seek, recruit, and retain educators of the highest quality both in personal and professional merit. We will be creative and out-of the box as we work collectively to meet the varied needs of our students as individuals and also as a community. We will use data and also value the observations of our educators, as well as their knowledge of our students as individuals based on interactions facilitated through dynamic and engaging teaching practices and classroom experiences. When teachers are experts in their fields and curriculum and know their students personally, they are able to merge their topics with the interests of the students, thus creating a high level of personal engagement and motivation on the part of the student. This encourages students to meet and exceed the standards as they connect the relevance of the subject to their daily lives, thus meeting the true goal of education. Although assessment will have a critical place in our school, our students will be taught that test-taking is essentially a life-skill, and we will prepare students to be successful in this skill, but with the proper perspective and context. We will be a school that is focused on growth as the measure of success; rather than seeing education as a race to some finish line, we will instill and model the importance of starting where we are and moving forward productively and confidently towrds continueal growth, development, and academic and personal success. We will teach to each student to think effectively and to love learning; when this is fullfilled we will see the growth and satisfaction on the part of each student.

Targeted school population: diverse, so diverse programming will reflect that. For populations requiring additional support, ie.e. ELL's, we will adhere to and comply with any and all federal and state standards to ensure that they have every opportunity for fair, equitable, and high-quality education. We will identify through home language survey and national testing, which will also help us to specify the exact nature of services to be offered at the school and classroom levels to ensure the needs are met and exceeded.

### **K-8 Curriculum and Instructional Design:**

Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure.

Although students will be on each teacher's individual roster, the responsibility for teaching will lie with the teaching community as a whole. Each teacher will have an area of expertise and will partner with teaching team of other subject area experts to ensure that the curriculum is delivered effectively, efficiently, and creatively, and to ensure and to document comprehension and mastery of skills and curriculum on the part of the students. Educators will have flexibility to do this in the way that best meet the needs of their students and themselves as professionals, provided that they have an evident rationale which they are able to articulate initially and explain/defend when called upon to do so. They will demonstrate authenticity in the connection between what they seek to achieve with students in their classroom and what is actually occurring in the classroom and in the educational process of their students. Educators will exemplify in a clearly observable way the clear execution (theory and practice clearly aligned and operational) of their rationale and will be capable of supporting it with evidence- personal and administrative record-keeping (which could include but not be limited to lesson plans, anecdotal notes, etc.) as well as records of student work, assessment, results.

Vision:

1-5th grade will be similar to current Montessori-style, using strategies, techniques, and in some cases, curriculum that is based on or similar to the Montessori philosophy and educational program.

The middle school model will be a co-teaching model in which teaching teams of two teachers, experts in their curriculum areas, will teach the middle school students. At year three we will add a second teaching team to adapt to our growing student population. The style of instruction will be project-based as much as possible with teacher experts in subject areas planning integrated lessons together (see interthematic planning matrix- attached.)

explain role of "clubs" and topics of interest above and beyond standard curriculum; i.e. student council, journalism, language exploratories, chess, service learning (key club)

Provide a synopsis of the planned curriculum, including:

1. One sample course scope and sequence (preferably in graph form) in the Appendices (Appendix B) for one core subject (specific to the school's purpose) for each division (elementary, middle) the school would ultimately serve.
2. Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model.

Teacher team planning is essential. Lessons are interthematic- based around month long themes- it is an approach of thematic learning for the students.

There is a strong global studies focus as well as a strong language component. At the middle school years we will establish a rigorous yet exciting curriculum; just as middle school students are becoming better managers of their time and workload, they are discovering the excitement that challenging curriculum offers. They will participate in real-life exercises and activities, sometimes independently and sometimes in cooperation with diverse peer groups.

3. 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.

Teachers will have to know their students and their subject area and be able to design and deliver relevant and appropriate course material in a meaningful, logical way that connect and engages students. We know as accomplished and dedicated educators that their is not one set MO for this; the delivery of instruction will be as individual and varied as the educators, and students, themselves. As classroom teachers, we must have immense tool belts filled with a wide variety of tools, some common and others highly specialized for dealing with unusual and even infrequent situations which may arise. A combination of logic, creativity, proactive thinking, clear and collaborative as well as unilateral problem-solving, good decision-making, thoughtful and reflective practices will all be evident in a successful educator on our team. Students who are fortunate to be taught and influenced by such professionals and who are actively engaged and included in their own educational process will definetly meet and exceed the educational standards and expectations clearly set forth prior to evaluation, and all of their work samples and products as well as assessment data (formative and summative) will reflect this in full measure.

4. Provide a school academic calendar (minimum of 185 instructional days or 1,025 hours) and a brief narrative on how the calendar coincides with the tenets of the proposed mission and education plan.

Beginning after Labor Day- 180 day calendar with the potential for summer programs (parent-funded) to be offered in the summer months. Holidays and workdays built-in, snow make-up days built in at the end of the year- not used if not needed. @ days provided for parent teacher conferences (formative and summative). Last Friday of every month is an early release day for students. Optional activities may take place on campus for students, led by parent volunteers with specialized skills. The early release day is designed and intended to provide professional development opportunities for staff, both collectively and independently, with prior approval. Teacher workdays will allow opportunities for tecahers to work together to conference about students and devote to time to the high level of maintenance and documentation involved with keeping an updated, accurate electronic portfoio on students, complete with anecdotal notes- all with the purpose of demonstared a holistic view of the process of growth and knowledge acquisition/subject mastery on the part of students.

The schedule will have a teacher workday each month and an early release day for students every last Friday of the month. That time will be used for professional development opportunities for staff to work and learn cooperatively for professional and collegial growth. There are four quarters with conference days built in prior to the beginning of the academic year and a summative conference at the end of the year.

The daily schedule will incorporate the following activities including regular class meetings to establish community. When possible, core curriculum classes will take place in the morning, followed by special area classes later in the day.

### **Special Programs and "At-Risk" Students**

1. Describe the methods and clear systems of prevention and intervention teachers will utilize to provide assistance to students that are not performing at expected levels: ensuring continued progress and academic student growth.

Teachers will collaborate at team planning to ensure individualized approaches to teaching curriculum, via differentiated instruction, with lessons incorporating strategies and activities reaching students with all

learning styles. Teachers will partner with parents to keep them informed of progress, and if potential difficulties surface, the two will partner to plan initiatives, interventions to stop the problem and prevent new ones from beginning.

If a student continues to experience difficulty in an academic area, Intervention team (I-Team) will convene when necessary-it will be a collaborative conversation by educators with input from specialists such as administrators and classroom teachers. Further observation/lesson time with an educational psychology specialist who can identify processing deficiencies and report back to the team with observations and specific identified issues and strategies for overcoming such issues, may be necessary in some cases. Teachers will explain and offer clear and direct solutions and specific strategies for educational issues during family education nights or individualized family conferences as needed. The school will seek to provide tutor opportunities for students free of charge for students. All staff will be required to provide extra help sessions 2x per week built in during the day or after school; the school would actively seek to compensate teachers for this service although it may not be feasible during the first year of school. (All expectations will be clearly defined during the interview process.). Teachers will incorporate "office hours" into personal schedules to be submitted to and approved by admin each semester or as needed to account for changes and modifications in response to student need. We as a school team will be monitoring (curriculum- point person to implement this) so that we can know where students are in their process. The classroom environment will be a student- supportive environment- peer tutoring and study sessions to be implemented (Include in financial piece) Whole school bonus if 100% of students show targeted growth.

2. Explain how the instructional plan and curriculum will meet the needs of English Language Learner (ELL) students, including the following:
  - a) Methods for identifying ELL students.
  - b) Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for these students.
  - c) Plans for monitoring and evaluating the progress and success of ELL students, including exiting students from ELL services.

According to the home language survey responses, indicating any home language other than English, students will be initially assessed with WAPT to determine LEP (Limited English Proficient) classification and eligibility for ESL services. Each student qualifying as LEP will be assessed annually during testing window (late winter) with the appropriate ACCESS for ELL's assessment as determined by the testing coordinator. All testing rules and regulations will be strictly adhered to as defined and explained by the federal testing requirements (Title III) as well as state requirements set forth for testing situations as necessary. The data gained in the annual testing serves as a clear starting point. The WIDA standards are highly specific and so armed with the data and all of the relevant meaning associated with each score, the education team can put together an individualized plan for each LEP student, clearly defining specific goals and strategies relating to their growth in English (listening, speaking, reading, writing). A technology program which administers benchmarks every 2 months to measure growth as it occurring can be an accurate predictor of how and when the student can reasonably be expected to meet and/or exceed grade level expectations as well as end of year testing requirements. Such

programs increase technology capabilities for students, helps them take an active role in personal and academic goal-setting, measuring their growth, in an interactive and yes, fun! way which also provides educators with a wealth of knowledge as well as clear data and concrete strategies and curricular programs for helping students continue to move forward and improve the areas for growth which they specifically need to target for improvement.

Solid, sound teaching practices and quality supplemental materials when necessary pertaining to ELL's will ensure comprehension and mastery of curriculum on the part of students who struggle with English as a Second Language. Additional family support will be anticipated and provided for, in the form of on-site language support as necessary (Spanish, French in-house and translators can be accessed if necessary to accommodate other languages)

MFLEP- monitored former LEP students will be tracked and if at any time they are found to be in need of additional support, this will be planned for and provided, whether or not they technically qualify for ESL services under Title III. We will seek to continually meet the needs of all students, all of the time. We have experts in this field who will be extremely thorough and cognizant of the individual students' needs in the area of LEP to ensure that this special population will not be overlooked, and on the contrary, will thrive in an environment uniquely designed and equipped to meet and to exceed their needs. Programs which ensure academic success are specialized materials for ELL's as well as modification on the part of the teachers. They will prevent material which is developmentally appropriate for the language level of the student in order to ensure that the students will experience success and be able to move to the next level of mastery.

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

- a) Specific instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.
- b) Plans for monitoring and evaluating the progress and success of intellectually gifted students.

Intellectually gifted students will be expected to meet and exceed the same amount of growth as every student on campus; however we recognize that being academically gifted can often bring a specific set of personality traits and needs. Because it is our practice to meet the needs of all of our students, we will quickly and clearly seek to identify needs and provide positive solutions. A strong academic component and program, with opportunities for student to be empowered to be active participants in the learning process, as well as many opportunities for self-designed independent study and group-work, additional programming, Socratic seminar (which incidentally is amazing for all students as are all of the programs we are proposing in this response; good teaching is good teaching and all students deserve access to quality, dynamic educational programming.) Our teachers will challenge our students to go beyond their comfort zones (educationally-speaking) and reach new levels of knowledge acquisition, in a sensitive way (i.e. encouraging a quiet math wiz to take a "risk" by studying a foreign language as an elective. At that point, the sensitive teacher would address the teaching of the language in a way that would appeal to a mathematically-minded person- putting them at ease and helping them see a different way of thinking. Similarly, helping an art student see the close connectedness of art and science could expand the connections made by the student and thus help him/her access information across the curriculum easier.

Specific programs for ELL's could include Iready, from Curriculum Associates

as well as Avenues materials and other ancillary materials through National Geographic. What Every 6th Grader Should Know series will provide resources and ideas for specific and supplemental curriculum for all students.

Plans for monitoring and evaluating the progress of AG students will be clearly defined by team (student, family, participating teacher) and be written into that child's personalized plan.

### **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) Amendments of 2004* (20 U.S.C. 1400 et seq.), 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 educators pursuant to law. Public schools are required to provide a full continuum of services to meet the unique needs of ALL students with disabilities.

### **Identification and Records**

1. 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.
2. 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.
3. Provide a plan detailing how the records of students with disabilities and 504 Accommodation plans will be properly managed.
  - a) Requesting Records from previous schools
  - b) Record Confidentiality (on site)
  - c) Record Compliance (on site)

When a student enrolls at Lakehaven, all records will be requested from previous school(s) attended. Upon arrival, administrator will thoroughly review the records. Any plans previously in place will be considered and/or honored upon review by our administration according to student needs, and in compliance with federal law and state policy. We will work cooperatively with local schools, particularly if they are transferring from neighboring schools to ensure smooth transition with minimal disruption for the student in terms of adaptation and continuation of services when applicable. Once they are enrolled, if a student not previously identified should be deemed as needing further intervention, the process will include a recommendation to the Intervention team, a group of teachers and administrators who work together to clearly identify and analyze issues, plan and monitor appropriate educational interventions, and plan and provide for necessary testing if it is determined to be beneficial and approved by the parents. The testing process will involve either providing testing/services by an EC specialist on staff, or contracting with ad-junct specialists. In some cases, we may be able to partner with local schools if their personnel has room to see a special needs' service (which would be provided and funded at the parents' expense except in cases where families have indicated and have been identified as having financial hardship. In this case, the school, while not offering recommendations or encouraging services from a particular provider, could assist in arranging those service. All student files will be kept in a locked cabinet and labeled confidential. A teacher or administrator who has a legitimate need to access these files will sign them out and peruse them as needed at a designated place in the file room, and

then document the time that the file was returned. A database will be maintained for all students receiving Exceptional Childrens' services

Teachers will handle record-keeping

Intervention team comprised of teachers and admin who can determine collaboratively whether a student is in need of additional testing and/or further education services.

We will partner with local CMS school to coordinate testing and/or special services of which our students may be in need as well as use on staff specialists or contracted specialists of necessary.

### **Exceptional Children's Education Programming**

1. Describe the educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities.
2. Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).
3. Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents and relevant staff.
4. Describe the proposed plan for providing related services.

All students at our school will have a personalized plan designed to meet their specific needs and will be monitored continually; however, students qualifying as Exceptional Children under 504 will be additionally monitored by a case-manager specialist who is highly knowledgeable and capable of taking action and decision-making (should questions arise from the team) in order to adhere to all policies, requirements, and standards set forth by the federal and state governing authorities.

### **Student Performance Standards**

1. Describe the student performance standards for the school as a whole.
2. 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.
3. 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.
4. Provide the public charter school's exit standards for graduating students. These standards should set forth what students in the last grade served will know and be able to do.

Elementary school (1-5) curriculum will place heavy emphasis on philosophy, methodology, practices and materials of the Montessori philosophy, to include global curriculum and corresponding record-keeping, focused work period (which will allow ample opportunities for interthematic project studies to take place), co-teaching, whole group, small group, flexible group and independent study time, often coinciding simultaneously).

The middle years will focus on an International Baccalaureate program (IB) which also has a global emphasis and focus on 21st century relevant application in its rigorous, yet intellectually stimulating curriculum and implementation.

At all grade levels, we will use state and federal standardized testing when necessary and appropriate ( for example, EOG beginning at 3rd grade as well as EOC testing) as well as providing other opportunities which may allow students to self-discovery areas of aptitude, both personally and academically. Additionally, we will implement innovative technology-based programs and diagnostic tools which are enriching for both students and



teachers such as i-ready, providing a clear benchmark for both reading and math as well as practical feedback and concrete lesson ideas which teachers can use to personalize lesson plans and ultimately to drive the instruction in order to meet the needs of each student.

As each students portfolio will be actively updated and monitored by both teachers and students, and available to parents in conference twice a year in addition to by request, any potential problems will be addressed early, so that any possibility of retention will be discussed and hopefully prevented before that time would come in the spring of the academic year in question. Should such an instance arise, a variety of facotrs would be taken into consideration by an intervention team which will make this decision. Factors would include classwork, testing data, evaluation( informal and formal in some cases) of students' strengths and areas of concern, teacher input, parent input, social and emotional facotrs and ways to help student from those perspectives in the case that a retention would be deemed necessary. I will say that as an educator who has read lots of research, I haven't seen a lot of evidence supporting retention so we would never make that the goal, even though we must always recognize that each student is a unique individual with a unique set of circumstances and those decisions should always be evaluated on a case by case basis, with the decision ultimately being made based on the best interests of the child both in the immediate and long-term.

GRADUATION STANDARDS:

**Student Conduct:**

Provide a brief narrative that disseminates 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.

Provide a draft copy of the student handbook within the appendices (Appendix C).

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 regards 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.

look at handbook-

not rewards-based, focusing on intrinsic rewards with the ultimate goal being to establish the joy of learning and that an in-depth, well-rounded education is the greatest gift/ "reward" of all. Students will learn to live out 21st century prosocial skills such as problem-solving, including during instances where behavioral problems arise, whether in response to a teacher or between peers. A student council will be implemented, active opportunities for self-evaluation and efelection on practice (both teachers and students) in the form of journaling, anecdotal notes and records.

A foundation of behavior based on respect and that we all have rights but that those end where another's begin (i.e. our right to free speech ends when we are verbally abusing someone with a personal attack or insult-i.e. you're so stupid- that was such a dumb idea!) Instead, students will be taught active listening skills and the art of constructive feedback born out of a respect for the other's well-being and need for respect as a human being. Many opportunities will be offered where healthy debate can be

modeled and taught. (classroom communication- class meetings, during dynamic lessons, persuasive writing opportunities, debate club)

In an attempt to be very proactive in communicating in order to prevent potential problems from arising, school will implement an open door policy on the part of teachers and administrators to listen to student and/or parent concerns at a mutually agreeable time for both parties. Parents can bring issues to the concerned person via email, phone message, in writing, and a meeting can be arranged at a mutually agreeable time.

Non-violence policy- physical assault of any kind on another human, animal, or inanimate object will result in immediate removal from the classroom environment.

Bringing and using weapons, tobacco, alcohol, drugs is forbidden on the campus grounds and in all building and structures residing on the school's property.

If/when a student is suspended or expelled, every reasonable effort will be made on the part of the school to provide the student with assignments which he/she will be expected to complete upon return to school.

**IV. GOVERNANCE, OPERATIONS and CAPACITY**

(No more than ten total pages in this section)

**NOTE:** Please answer all sections completely. Do not use "same as LEA" or "whatever the law states". Lack of proper documentation could deem the application incomplete.

**Governance:**

**Private Nonprofit Corporation:**

\*The nonprofit corporation must be officially authorized by the NC Secretary of State by the final approval interview date.

*Name of Private Nonprofit:* EduCreate, Inc.

*Mailing Address:* 9025 Scottsboro Dr.

*City/State/Zip:* Huntersville NC 28078

*Street Address:*

*Phone:* 704-875-8070

*Fax:*

*Name of registered agent and address:* Stacy Remy  
9025 Scottsboro Dr.  
Huntersville, NC 28078

**FEDERAL TAX ID:**

**Tax-Exempt Status 501 (c)(3)**

The private nonprofit listed as the responsible organization for the proposed charter school has received 501 (c)(3) status:

Yes (copy of letter from federal government attached: Appendix D)  
 No

**NOTE:** If the non-profit organization has yet to obtain the 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.

**Governance and Organizational Structure of Private Non-Profit Organization:**

The private nonprofit corporation 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.

Please complete the table provided depicting the founding members of the nonprofit organization.

<b>Board Member Name</b>	<b>Board Title</b>	<b>County/State of Residence</b>	<b>Current Occupation</b>
Patricia Moreira-Garcia	Founding Member	LINCOLN	Principal

Sonya Curry	Founding member	MECKLENBURG	Head of School, Christian Montessori School
Stacy Remy	Founding member	MECKLENBURG	Independent tutor

**Please provide the following in this location of the APPLICATION: (Do not include as an appendices.)**

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

The school will begin with an executive board of 3 members in place, who will then appoint and unanimously approve 4 remaining members on or prior to September 1, 2013.\* This founding board, comprised of 7 members, will serve an initial term of 3 years. The four additional members will include a representative of the staff, a representative of the parent community (\* to be determined within the first month of school opening in order to accommodate a member of the parent community), a secretary (member of Lakehaven community or not- appointed and unanimously approved by community vote) and a treasurer (member or non-member of Lakehaven community- appointed and unanimously approved by executive board). In circumstances where the executive board will also be an employee of the school, prior and/or immediate disclosure of any real or perceived conflict of interest will be identified, voiced, and clarified in writing by the member to the remaining board members that employee will voluntarily abstain from voting on any issues relating to the conflict of interest. The board, which will hire the lead administrator of the school, will primarily serve as an advisory role and will include representatives of groups whose insight is necessary for the well-being of the community (i.e. staff and parents) as well as representatives who bring a wide variety of expertise, including financial wisdom and experience as well as legal, professional, and pedagogical as needed or required. The roles and responsibilities will be to proactively bring issues to the table that need to be addressed and considered for the betterment of the school and its programs, as well as to thoughtfully consider and advise on any relevant issues brought to the board by any member of the community. The board will serve as advisors, responsive listeners who can understand the essential issues facing the community and can recommend expert and effective to be taken, providing resources for doing so when necessary (i.e. establishing a committee to organize and activate fundraising if need for such a project is identified.) Other responsibilities will be participation in all activities as set forth by DPI during planning year, and eventually to attend all board meetings, regularly scheduled on a monthly basis, as well as emergency meetings as needed in the case of an urgent matter to be resolved. The board members, no matter how they are personally or professionally affiliated with the school, will hold themselves to the high accountability of putting the interests of the larger school community at the forefront in every decision-making process in which they participate. The board will consider the track record, educational expertise and experience as well as personal experiences and growth of the candidate when considering the ideal candidate to lead the school. Evaluation of the lead administrator will be based on a variety of factors, including staff surveys, peer observation and anecdotal notes by peers, student growth at the school level (annually at year 2), the candidate's

ability to explain and demonstrate the rationale for actions, procedures, and decision-making. In much the same way as the teachers will be held accountable by the high standards of professional achievement and growth as set forth in the North Carolina Teacher Appraisal Instrument, the lead administrator(s) will be held to high, rigorous, yet fair standards based on their constantly evolving growth and achievement at both the personal and professional levels.

2. *Describe the size, current and desired composition, powers, and duties of the governing board. Identify key skills, areas of expertise, and constituencies that will be represented on the governing board. Explain how this governance structure and composition will help ensure that a) the school will be an educational and operational success; b) the board will evaluate the success of the school and school leader; and c) there will be active and effective representation of key stakeholders, including parents.*

Current Founding Executive board-

Patricia Moreira Garcia- marketing, teaching, education administration, curriculum, management, finance, life experiences

Sonya Curry- school founder and owner, Head of School experience, curriculum (Montessori), life experiences

Stacy Remy- teaching, education experience, life experiences

Future members (est. by Sept. 1, 2013)

member 4- teaching team member (for feedback, insights, and proposals directly impacting staff and students)

member 5- parent representative- for feedback, insights, and proposals impacting students and families)

member 6- expert appointed by executive board- legal and/or financial expertise- ideally both

member 7- expert appointed by executive board by voted on by community- for fresh perspectives, specific areas of expertise such as legal or finances

Additional members: member 4- teacher representative

member 5- parent representative

member 6- expert- nominated by executive board

member 7- expert- nominated by community

the founding school leader will be decided upon by the executive board; if one of those members will be elected as the founding administrator, then that person will abstain from any decision-making/discussion that relates to Head of School personnel hereafter in order to avoid any type of conflict of interest.

b.

c.

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

The founding members of the board are two educators with an incredibly diverse knowledge and experience base who want to put that expertise to good use by serving children in the vibrant educational climate we will create. The initial vision for the board was to actively seek and recruit advisors with a wealth of expertise in areas where we would need other perspectives and expertise. The third executive member, who founded and has been running a school since 1994, was recruited for the wisdom and experience she could bring to our enterprise as well as the quality and scope of the mission of our schools. Although the three of us bring much in the way of experience

(both professional and personal) in expertise, we realize that it is essential to have a larger diversified board in order to truly reflect the perspectives from many areas essential to charter school success, as well as in order to accurately reflect and meet the needs of the evolving community of students, parents, and staff who make up our school community. If at any time a position is vacant, we will seek to replace the member in a timely fashion. Although we hope that most people who come to our school will share in our unique, personalized approach to educating their children as individuals and yet as members of a close community of learners, we realize that a diverse set of viewpoints can only enhance our experience as leaders by challenging us to consider decisions from all sides before making the best decisions for our community.

4. *How often will the board meet?*

Once a month and as needed for various situations which may arise.

5. *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 Policies Draft: Appendix H).*

Participate in planning year, online archived webinars via DPI. The main responsibility of each member will be to actively bring their expertise and to remain up to date and in the know of current trends, issues, research in their field which could benefit our school in some way (i.e. someone with financial expertise knowing about new developments in the tax code or a legal expert knowing about recent policy developments at the federal and state levels)

6. *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.*

We will be clear and transparent at all times about the ways we make our decisions and what the motivating factors are which guide our priorities—with the best interests of the children in our learning community being the driving force. If at any time there could be a situation which could be or be perceived as a conflict, the board member will be encouraged and required to voluntarily divulge this, at which point he/she will abstain from voting or in some cases, discussing, the issue at hand.

We will post meeting times as well as publish minutes in a visible place. We will encourage attendance on the part of staff and parents and have a sign-up sheet at each meeting where people who wish to address the board may have the opportunity to do so.

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

Always student best interest and in alignment with overarching philosophies and practices of the school. We will use good decorum in discussion but also understand that open honest dialog, especially encompassing a variety of viewpoints, may bring some heated opinions. This will be acceptable provided that it stays respectful of others. An issue can be brought for discussion. Some decisions will be executive decisions, which the board will explain/clarify upon request should there be a curiosity or concern as to the rationale behind or leading up to the decision.

8. *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.*

Open board meetings, and 1 night a month there will be a parent meeting

night where head of school will communicate new and or relevant agenda points as well as answer questions, hear concerns of members from the parent community. there will be a monthly meeting with the head of school where parents will hear the upcoming short and long-term plans of administration as well as a time to resond to questions or concerns from the community. Whether or not a parent-teacher organization or further, specialized committees need to be formed will be determined as the community establishes it needs and desires for growth within and in addition to the plans set forth, as well as determining the skills and areas of expertises represented by members of the staff and parent communities.

**Governance and Organizational Structure of Private Non-Profit Organization (continued)**

**Include in the Appendices:**

- 9. 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).
- 10. A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix E).
- 11. 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 (Appendix F).
- 12. A copy of the articles of incorporation, if available. If not available, this document must be available prior to interview by SBE, the applicant must demonstrate that it has been applied for prior to submission of the proposed application. (Appendix G)
- 13. Copy of any board policies if adopted already (Appendix H).
- 14. Copies of meeting minutes (if available), relevant to the development of the charter school plan, during the application process (Appendix I).

**Proposed Management Organization (Educational Management Organization or Charter Management Organization)**

*If the proposed school does not intend to contract with an education service provider, mark "Not Applicable" and follow the direction #3 in the Application Specifications.*

**X Not Applicable**

**Private School Conversions: complete ONLY if the proposed charter is a private school conversion.**

*Otherwise, mark "Not Applicable" and follow the direction #3 in the Application Specifications.*

**X Not Applicable**

*Applicable" and follow the direction #3 in the Application Specifications. Understand that the replication means that a new charter school will be governed separately from the charter school the application is modeled after.*

**X Not Applicable**

**Projected Staff:**

Provide, as Appendix K, a list of positions anticipated for the charter school; (e.g., principal or director; finance officer, administrative support staff; teachers (part-time and full-time); paraprofessionals/teaching assistants, clerical, and maintenance.). Be mindful that your predicted administration and staff match the projected enrollment noted in Section I and align with the proposed budget.

**Staffing Plans, Hiring, and Management**

Include the following information for the proposed charter school:

1. *Explain the board's strategy for recruiting and retaining high-performing teachers.*

Highly qualified, holding the correct license or having the ability to obtain it through passing successfully a Praxis exam. High performing will mean many things: track record of growth in students, ability to establish rapport, connect with, and positively influence students to achieve academically and grow as individuals. High performing means demonstrating and understanding of the school's mission and philosophy and guiding principles and a willingness to actively contribute as a valuable member of the team, bringing vast experiences, expertise, vision, ideas, skills to the table in the dynamic, fast-paced often demanding, student-centered environment. The interview process will include an observation at the school and the opportunity to teach a sample lesson. The candidate will bring a proposal of how they envision their contribution to the school. We will seek to establish and maintain a professional, collegial environment where teachers have high morale, even amidst challenging situations, due to the personal and professional climate that is created and fostered among all members of the community. There will be thoughtful feedback on job performance with the underlying goal of helping every employee reach their highest potential as an educator and as a person. Teachers will be empowered, and although administrators will actively participate in the workload (serving as "leader-teachers") and ultimately bear the responsibility of leadership, teachers will be encouraged to use their professional skills and knowledge and contribute ideas and perspectives as well as their skills, knowledge, and time. Teaching is not easy by any means, so we strive to share the load and the challenging moments so that teachers want to come to work and students ultimately feel and benefit from the positive climate instilled.

2. *Provide a description of the relationship that will exist between the charter school employees and the nonprofit board. Provide as Appendix L, a draft of the employment policies to be implemented by the proposed charter school.*

Employees may at any time attend open board meetings. As some members of the board may also serve in leadership capacities at the school, there will be many efforts made and specific avenues put in place so that teachers and employees may voice comments/feedbacks/concerns. Employees and employers of Lakehaven will all be mutually accountable: i.e. teacher evaluations of heads of school will be taken into consideration when evaluating effectiveness of instructional leaders. Peer observations will be considered in teacher evaluations, even informally, as a model of helping professionals reach and grow and strive for continuous improvement in the art and science of their teaching styles, methodology, etc. The board, although it does not have the authority to hire and monitor the performance of the Head of school, will serve primarily as an advisory board of experts who can set policy and make decisions which will benefit the good of the students and community. Essentially, the board is a functioning part of the school who understands the mission of the school and provides insights, makes broad and/or detailed decisions as needed and facilitates the ease by which programs and policy can be implemented by freeing up funds, contacting people who can help, etc.

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

Hiring: background check required- employment will be contingent upon successfully passing criminal background check and drug testing.

Dismissing- a process over time. At the first sign of a potential problem, every effort will be made on the part of school administrators to



effectively and clearly understand and define the issues and work together with employee to work out an action of plan of solutions which would improve the situation for everyone and put things back on a positive trajectory. In the event that plans and procedures in place and mutually decided upon do not relieve the situation, or actually worsen it, then the employee may be asked to resign. the employee will have the right to appeal in writing at any time to the leadership and/or the board.

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

The ultimate vision is to avoid a huge discrepancy between salaries of leadership and teachers. Higher than local school system and opportunities for supplemental income via clubs, extended employment (tutoring) when possible. Contracts will be offered on a yearly basis. Within the first year, the four teaching positions will start at 40,000.00 annually (which will always be the minimum- as compared with the local school system which has a 1st year, master's degreed teacher starting at \$38,955.80 annually. That will be the base salary, with opportunities for salary add-ons depending on contributions to school (i.e. specific activities which the staff member leads, participates in according to the programming and planning of the school's mission and vision).

5. *Provide the procedures for employee grievance and/or termination.*

We will use the NEAT process for initiating formal issues with employees, if and when all previous attempts for open and honest communication between employers and employee do not resolve issues in a constructive way:

N- Notify: 1st offense, verbal, 2+ offenses in writing

E-Educate: This can be professional development or a clarification of complany's core values and expectations, as appropriate. We want to ensure that we gave the employee any chance to correct, based on the possibility of miscommunication which can occur naturally between people.

A- Assist. At this point, we would formally assign a mentor or a peer to work with the individual which could provide more hands-on support in real time and have a positive effect on the person's performance, or provide another avenue for the employee to work out any issues related to the job performance which he/she may not wish to share with direct supervisor (although we as management will make every effort to create and maintain an approachable attitude to be able to hear the concerns of employees.)

Timeline- If all the above recourses have failed to resolve lasting issues, we will create a timeline for ending the relationship with the employee while still striving to help them grow professionally and personally (in other words, they will not be penalized as they finish out the terms of their contract.)

This would not apply in a situation where the action was of an emergency or grave nature;i.e. of criminal nature, endangering others such as physical abuse. In this case, with reasonable evidence supporting it, the employee would be placed on unpaid leave as incident is investigated further. Such an offense would result in immediate termination. An employee wishing to resign at any time is asked to give notice and to help in the finding of a replacement if and when that is possible. If an employee at any time has a grievance with the school, they are encouraged to approach their administrator in question or the board.

6. *Identify any positions that will have dual responsibilities (within or without the organization) and the funding source for each position.*

Every employee will come to the school prepared to wear many hats and to play many roles in fulfilling the many roles and responsibilities it takes

to effectively get the job done of educating students. In the event that the school receives specified funding (i.e. Title III for ESL), a specific staff member would be designated to meet highly specific and clearly defined goals and the funding source and allocation of that salary and purpose clearly identified. The administrative assistant will have a technology-rich background and will be expected to contribute all of the aspects of his/her skill sets to advance the goals and values and contribute to the success of the school community as a whole.

7. *Describe the plans to have qualified staffing adequate for the anticipated special needs population, means for providing qualified staffing for ELL and gifted students.*

ELL- ESL or ability to obtain ESL certification- ideally multilingual, extensive knowledge of Title I and Title III provisions and initiatives, thorough knowledge of WIDA consortium values, testing. Strong cultural competence and ability to reach out and communicate with diverse families, provide support to families on behalf of student and act as a parent/school liaison when necessary.

Gifted- it is a requirement of all of our teachers that they be well-equipped professionally to meet the needs of all students, including gifted students who need to be challenged and show growth (based on testing data as well as personal growth by participating in meaningful and relevant, personally-enriching activities and assignments in their coursework) at a high rate each academic year.

8. *Provide a narrative detailing the roles and responsibilities, qualifications and appropriate licenses that each position must have to be hired by the non-profit organization and effectively perform the job function(s).*

Principal (middle, elementary)- A person who is responsible for the operation of a school and is on-site on a regular basis. Principal licensure or the ability to obtain it in a timely manner is a requirement. Longtime service and experience in experience is a must.

Curriculum Specialist- A person who is responsible for the day-to-day operations of the school, is on-site on a regular basis, and serves in teaching/curriculum facilitation capacities as needed. Teaching licensure is a requirement. Education and experiences will be a consideration in candidacy.

Administrative/Financial Assistant- A person who assists in the day to day operations and tasks which make up running the school. These could include office management and interacting with students and families often. It would include financial tasks. This position will require strong organizational skills and attention to detail.

middle school teacher- A person who is responsible for planning and implementing the daily program of activities for a group of children in a school or on an off-campus activity or function during school hours, if and when the parent is not present. We will have teaching teams with curriculum specialty area. The teachers will plan cooperatively, share data, share responsibility for monitoring student progress. Teacher's will be certified or have the ability to obtain certification in the areas in which they will teach.

special areas teacher- this person will be responsible for assisting in arts integration activities to be in alignment with the classroom curriculum and will have regular teaching responsibilities. Certification, the ability to obtain it in the certification area is a requirement.

All staff members will be required to have a team approach where no task is too big or too small. A diversity of educational and life experiences is a must as well as the ability to think critically. The vision and mission must be respected and all actions should relate back to fundamental shared values of best practices in education and all decision-making should reflect those values as the community interrelates.

EC/ESL/Psychologist/speech- specialists who may be contracted to serve students with special needs. Some of these roles maybe able to be filled with other personnel at the school, which is acceptable in accordance with knowledge and in-depth understanding of the processes and polociies which determine procedure at the LEA and the schoolhouse level.

foreign language- A person who plans and implements appropriate lessons which are in alignment with the classroom curriculum. Candidates will possess native or near-native levels of fluency in listening, speaking, reading, and writing the target language.

Admissions director/ student services

business manager/director of development

direcot of environmental services

media/technology-even voluntary basis to start out

### **Staff Evaluation and Professional Development**

1. *Identify the positions responsible for maintaining teacher licensure requirements and professional development.*

The Administrative assistant will formally document this on the school premises, and every effort will be made to ensure to each educator his/her responsibility in staying aware of these requirements and how they are being met in a timely fashion.

2. *Provide a detailed plan noting how the school will mentor, retain, and evaluate staff in a format that matches the school's mission, educational program, and meet the teacher certification and licensure requirements for teachers as prescribed by state law and No Child Left Behind. Be sure this overview matches with the projected staff and funding of the proposed budget section.*

The administration will take the lead role in evaluating and monitoring teacher performance by administering the current state appraisal instrument including the initial self-assessment by the educator to determine areas of strength and areas for growth on which the educator wants to focus throughout the academic year ; however, as a supplement to the standard appraisal method, the school will take into consideration observation in a variety of settings, considering the value-added factors which each educator brings to the school as a valuable member of the team. In alignment with the team approach, the administrators will consider feedback from teaching teams about the teacher (which will all be a transparent process and with the teacher's full knowledge and involvement in the process) In alignment with the "it takes a village approach" student and parent surveys regarding their experiences with staff will be considered. Teachers will take a very active approach to their performance, and have the ability to have input into the content/format of professional development offered on-campus- or off, as scheduling permits. At the beginning of each year, each educator will meet with administration to discuss the results of the self-evaluation and propose what their areas for growth on which they will focus primarily. They will maintain a record in a format which is convenient to them (portfolio, electronically, etc.) in such a way as to document what they've done, how they've done it, and how it has benefitted students. Frequent, respectful, and clearly defined feedback- both positive and in the form of constructive criticism in a caring way and with good intent, will be given both at the

request of administration as well as from the educator as needed. Open communication, whether from admin. to teachers, between colleagues, or between teachers and students or teachers and families will all be an important part of the process as we all seek to capitalize on our strengths and improve on our weaknesses- both independently and as a community.

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

The core components will be that the offerings be individualized and relevant to both the success of the students and the overall success of the school program. We will set once a month to address issues pertaining to staff development and/or offer opportunities for in-service. Other opportunities will be offered periodically, sometimes on an optional or as-needed basis, in order to ensure that all educators are being challenged to grow professionally and personally according to their individual needs in a way that is not overly demanding of their needs to balance their work and lives in a way that suits their broad goals. Teachers will be encouraged to be good managers of their time and every effort will be made on the part of administration to offer guidance and support within a structure that is respectful of the needs and time constraints, and professional as well as personal obligations and responsibilities of staff. Team meetings will provide opportunities for professional development in a way that is helpful for building collegial rapport as well as for supporting the overarching philosophy of the school which seeks to establish a community approach to planning for and implementing the coursework and programming for the students.

4. *Provide a schedule and explanation of professional development that will take place prior to 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.*

5 days prior to students returning:

Day 1- School orientation (am) classroom time (pm)

Day 2- curriculum overview, team planning (am), classroom time

Day 3- classroom time

Day 4-project sharing- report back to group

Day 5- Parent-teacher conferences

\* The morning structures are non-negotiable- all staff will meet together to get acclimated to environment, learn and discuss policy, procedure, expectations. The remaining time will consist of ample time to participate in team planning as well as to work independently and self-paced on preparing the environment, individual planning and execution of required tasks.

5. 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.

10 days per year teacher workday

last Friday of each month designated as 1/2 day- onsite activities for students (parent volunteer led) for professional development

## **Enrollment and Marketing:**

-

Reaching the full capacity for enrollment will be critical to obtain 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 GS 115C.238.29F(g) (1-7) carefully.

### **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-238.29F(g)(5)).*

The area of Huntersville, a suburb of Charlotte, is becoming increasingly diverse in its demographics. We seek to emulate the larger population and yet expand on the opportunities students have to be in community with families who are like-minded in their educational goals, which will include people from diverse backgrounds and circumstances. We will market in the immediate North Mecklenburg area, including Huntersville, Cornelius, and Davidson, and the University area. The location of the school might afford the opportunity to students to attend, including in a nearby apartment complex to apply.

In writing and in person we will share information about our school. We will establish a website, use electronic media. We will host open houses on site at the school to share our program and to allow prospective students and families the opportunity to see the site/facility and to get a better understanding of what our vision and mission are and how we plan to carry it out in the educational opportunity we are offering.

### **Parent and Community Involvement**

- 1. Describe how you will communicate with and engage parents and community members from the time that the school is approved through opening.*
- 2. 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.*

Community parent-education nights, family night events, invitation to attend board meetings and access minutes and meeting times easily, constant effort for open communication, including 1x per month Community meeting with head(s) of school available to listen to concerns, answer questions.

Knowing our families in our communities and their interests, skills, areas expertise which they may want to contribute to the school. We won't set rules and regulations governing this (i.e. 20 hours volunteer time per year) rather we will ask that each family contribute in the way that is most comfortable and feasible for them, whether it be by participating in fundraisers, managing and planning events, offering input, volunteering their time, expertise, or supplies.

Much of how the life of the campus will be determined as the community develops as a group of people sharing their individual strengths, skills, and expertise for the benefit of the school community as a whole.

(following 3 paragraphs have been adapted from a document provided courtesy of Sonya Curry, head of School at Christian Montessori School of Lake Norman, used with permission)

At Lakehaven Academy parent involvement is essential and has a significant impact on our childrens classrooms as well as the greater school community. We depend heavily on our talented parent population. Whatever your interests- cooking, gardening, writing, technology- we need your special abilities. Your contractual participation in 20 hours of volunteerism is referred to as "Parent Co-op" as it is a cooperative effort to provide helping hands of service to our school, which will benefit all of our children.

Attached is a list of opportunities that need immediate attention. We would be extremely grateful for your participation. Many valuable contributions of time and talent are made because parents wish to be supportive of their child's classroom activities. We appreciate your services to the classroom but ask that you consider spreading out your hours to serve the broader school community as well.

Please note that Parent of the Week responsibilities will count toward hours. Families will be rewarded 1 hour for every week they serve as "Family of the week". In situations where there are siblings, an hour will be awarded accordingly.

If you foresee not having anytime to physically volunteer any or only a portion of the required 20 hours, you may opt to pay the \$15 (per hour) fee. Please let us know if you are interested in doing this on your Co-op Agreement. The Parent Co-Op Coordinator will be in touch with you shortly to answer any questions you may have.

(There will be an online sign up which will include this document as well as have a sign up opportunity with all service opportunities listed.)

Much of the evolution of parent involvement and campus activities will be determined by the community we establish and the families we draw in and who are equally committed to a shared vision and purpose of our proposed education philosophies and practices.

## **Admissions Policy**

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

1. *Tentative dates for application period; enrollment deadlines and procedures.*
2. *Clear policies and procedures detailing the open enrollment lottery plan including policies regarding statutory permitted student enrollment preferences.*
3. *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 withdraws and transfers.*

Parents are highly encouraged to attend an open house prior to submitting the application for the lottery. At the point when they decide the school might be a good fit for them, they may apply using the lottery process. There will be two open enrollment lottery opportunities during the planning year. One in November and a second in January. The first one will be an Early Admission Lottery. The Second Lottery will be the final lottery. Thereafter, enrollment will be taken as a first come first serve based on space availability. Those applying after the lottery process must follow the same rules of having fully completed application. Future lotteries (year 2

throughout life of charter) will be held annually, with an application deadline of December 31 yearly and a formal lottery being held annually February 1. Below is the process for inaugural procedure in detail:

(On the second Monday in August of every year)

August 12, 2013 Application and Pre-Registration process begins.

\*Parents may begin to turn in application for enrollment for the 2014-2015 school year. For the 2014-2015 enrollment in grades 6th and 7th will only be accepted. Beginning 2015-2016 enrollment will be accepted for grades 1st through 8th grades contingent on available space.

( On the fourth Monday in October of every year)

October 28, 2013 Deadline for Early Enrollment and First Lottery.

\* Within 15 day, Lakehaven will review the applications that are complete accept students on capacity. If we are over capacity an Open Lottery will be held in a community public forum on school site inviting all applicants to attend. Students not selected will be placed automatically in the second lottery.

(On the fourth Monday in November of every year)

November 25, 2013 Acceptance Letters go out for Early Admissions.

(On the third Friday of December or last day prior to Winter Break of every year)

Signed acceptance of seat and full registration due by December 20, 2013.

(First workday in December or last day prior to Winter Break of every year.)

December 13, 2013 Application and Pre-Registration Process begins for Second Lottery.

All students on the waiting list from the first lottery and second lottery will be placed in on pool.

\*By January 31st, lake haven will review to ensure that all applications are completed and accept students based on capacity. If we are over capacity an Open Lottery will be held in a community public forum on school site inviting all applicants to attend. Students not selected will be placed automatically on a waiting list in the order that their name was retrieved from the pool.

(February 1st of every year or nearest workday.)

February 3, 2014 Acceptance Letters of out for Early Admission

(On the fourth Monday of February of very year)

Signed acceptance of seat and full registration due by February 24, 2014

(August 1, 2014 Last day to register for the 2014-2015 school year if seats are open)

There will be two open enrollment lottery opportunities. One in November and a second in January. The first one will be an Early Admission Lottery. The Second Lottery will be the final lottery.

Again in regards to waiting lists, when over capacity students not selected in the First Lottery will be placed automatically in the Second Lottery pool. Students not selected in the Second Lottery will be placed automatically on a waiting list in the order that their name was retrieved during an open community public forum.

Parents are encourage to do transfers and withdrawals only during the end of the quarter for the educational continuity of students.

Students who previously attended Lakehaven Academy but who withdrew on their own choice but desire to re-enroll will be given full priority provided space availability. This will be limited to one time per child any

exceptions to this will need to be taken for board approval. First notification of possible non readmission will occur by May 1st.



**PROJECTED ENROLLMENT 2014-15 through 2018-2019**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Charlotte-Mecklenburg Schools  
 LEA #2  
 LEA #3

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

	2014-2015			2015-2016			2016-2017			2017-2018			2018-2019		
	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000
Grade 01	0	0		10	0		10	0		10	0		10	0	
Grade 02	0	0		10	0		10	0		10	0		10	0	
Grade 03	0	0		10	0		10	0		10	0		10	0	
Grade 04	0	0		10	0		10	0		15	0		15	0	
Grade 05	0	0		10	0		10	0		15	0		15	0	
Grade 06	22	0		20	0		30	0		30	0		30	0	
Grade 07	23	0		22	0		30	0		30	0		30	0	
Grade 08	0	0		23	0		30	0		30	0		30	0	
	45			115			140			150			150		

### **Transportation Plan:**

*Describe in detail the transportation plan that will ensure that no child is denied access to the school due to lack of transportation. The details of this plan should align with the Mission, identified need for the charter school, targeted student population, and the budget proposal.*

Initially, the mode of transportation will be carpool. We will encourage parents and families to work together by carpooling and will actively seek to facilitate this process (by having a website where families can connect to each other by geographic location. We will seek to implement a bus service within the first 3 years of opening which could serve student populations from outside the Huntersville area by transporting them to and from a consolidated bus stop if and when that service is needed.

### **School Lunch Plan:**

*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.*

There is a kitchen at the school and hot lunch will be provided. The food is family-style, hot, nutritious, and delicious, and we will continue to incorporate healthy, organic options as part of the school lunch program as well as the education of the whole child in terms of how good nutrition is beneficial for maintaining healthful living habits. Students will participate in this process as much as possible- i.e. growing and serving the food, and preparation when possible. Students who qualify to receive Free and Reduced Lunch will not pay for this service and will also be entitled to a breakfast program upon arrival at school. The cook's salary and supplies will pay for themselves- funded by hot lunch participation.

The school hot lunch program will be self-sustaining in that it will be optional, on a month to month basis. Parents will receive a monthly menu and have the option to participate in hot lunch program by paying a monthly fee which will cover food, preparation, and supplies. The program is optional; however, families who qualify for free and reduced lunch programs (FRL) will access this program free of charge, as well as a small breakfast daily. Both meals will be written into budget but subsidized with government funding upon qualification(not included in budget because none has been secured at this point.)

At the Open House prior to and during the lottery application process, food will be provided by school in order to showcase the hot lunch program.

### **Civil Liability and Insurance (GS 115C-238.29F(c)):**

The Charter School shall obtain and maintain insurance at a minimum in the following amounts:

1. Errors and omissions: one million dollars (\$1,000,000) per claim;
2. General liability: one million dollars (\$1,000,000) per occurrence;
3. Boiler and machinery: the replacement cost of the building;
4. Real and personal property: the appraised value of the building and contents;
5. Fidelity bonds: no less than two hundred fifty thousand dollars (\$250,000) to cover employee dishonesty;
6. Automobile liability: one million dollars (\$1,000,000) per occurrence; and

7. Workers' compensation: as specified by Chapter 97 of the General Statutes.

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$1,000,000		\$1,000.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$4,000.00
Property Insurance	\$300,000		\$1,300.00
Motor Vehicle Liability	\$0		\$.00
Bonding Minimum/Maximum Amount	\$500,000	\$500,000	\$1,500.00
Other	\$2,000,000		\$2,500.00
<b>Total Cost</b>			<b>\$10,300.00</b>

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

**Health and Safety Requirements:**

All public charter schools are required to follow the regulations regarding health and safety as stated in § 115C238.29F (a).

We, the Board members at (Charter School Name) 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.

lakehavenacademy 02/21/2013

(Board Chair Signature) (Date)

**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.*

*What is your plan to obtain a building? Identify the steps that the board will take to acquire a facility and obtain the Educational Certificate of Occupancy. If a facility has been identified please fill out the Facility Form (Appendix N).*

We have approached a local private school, Christian Montessori School of Lake Norman, about housing our facility on their campus, located in Huntersville, NC. We will work within the existing structures on the campus, which currently includes 3 modulars in addition to their permanent structure, a facility which currently hosts their infant, toddler, and primary Montessori programs. In year 1, we will make use of two of the three existing modular units on campus. At year 2, we will add an additional temporary structure, as we simultaneously begin the building process for the new structure to accomodate enrollment and program growth. Although the specific terms have not been finalized, we are very certain of our ability

to pay for the rental of this property, and have ensured that the estimated rental amount is accounted for in our budget and represents approximately 10% of our annual revenue for the first year.

Eventually we will build another structure on the land as our school is able to expand and grow (population and grade levels)

**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.*

The plan for using the space already present and designated on the school campus is solid. In the event of a catastrophe, we would approach local facilities, including churches nearby who rent out space to non-sectarian organizations routinely. As our program starts small, we will develop in a way that should need minimal space in the early years of growth. We will begin a capital campaign to build a middle school environment as soon as possible as the community is established.

## V. FINANCIAL PLAN

In the following sections present a detailed description of assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative should specifically address the degree to which the school budget will rely on variable income.

### **Budget: Revenue Projections from each LEA 2014-15**

**SHOW  
CALCULATIONS  
FOR FIGURING  
STATE  
AND LOCAL  
DOLLARS  
FOR THE  
PROPOSED  
CHARTER  
SCHOOL**

*The formula for  
figuring these  
allotments can be  
found in the Resource  
Manual Finance  
Section.*

See **Charter School Dollars per ADM** on the following link for per pupil allotments by county.

<http://dpi.state.nc.us/fbs/allotments/support/>

- All per pupil amounts are from the 2012-2013 year and would be approximations for 2014-2015.
- Federal funding is based upon the number of students enrolled who qualify. The applicant should use caution when relying on federal funding in year one to meet budgetary goals.
- These revenue projection figures do NOT guarantee the charter school would receive this amount of funding in 2014-2015. For local funding amounts, applicants will need to contact their local offices or LEA.

LEA #1600 - Charlotte-Mecklenburg Schools

Revenue	2012-2013 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2014-2015
State Funds	\$4,438.40	60	\$266,304.00
Local Funds	\$2,377.00	60	\$142,620.00
Federal EC Funds	\$3,743.48	7	\$26,204.36
<b>Totals</b>			\$435,128.36

**Total Budget: Revenue Projections 2014-15 through 2018-2019**

<b>INCOME: REVENUE PROJECTIONS</b>	<b>2014-2015</b>	<b>2015-2016</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>
-Exceptional Children Federal Funds	\$26,204	\$41,173	\$52,402	\$56,145	\$56,145
-Local Per Pupil Funds	\$142,620	\$273,355	\$332,780	\$356,550	\$356,550
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-State ADM Funds	\$266,304	\$510,416	\$621,376	\$665,760	\$665,760
-Working Capital*	\$0	\$0	\$0	\$0	\$0
<b>TOTAL INCOME</b>	<b>\$435,128</b>	<b>\$824,944</b>	<b>\$1,006,558</b>	<b>\$1,078,455</b>	<b>\$1,078,455</b>

**\*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 statements, etc., on the availability of these funds.**

**Assurances are needed to guarantee these additional sources of revenue are available. Please include these as Appendix P.**

**Personnel Budget: Expenditure Projections 2014-15 through 2018-2019**

This Personnel list may be amended to meet the needs of the charter school: This list should align with the projected staff located in the Operations Plan (Appendix K).

BUDGET EXPENDITURE PROJECTIONS Personnel	2014-2015			2015-2016			2016-2017			2017-2018			2018-2019		
	# Staff	Salary per	Total salary	# Staff	Salary per	Total salary	# Staff	Salary per	Total salary	# Staff	Salary per	Total salary	# Staff	Salary per	Total salary
<b>Personnel:</b>															
Lead Administrator	1	\$77,000	\$77,000	1	\$77,000	\$77,000	1	\$77,000	\$77,000	1	\$77,000	\$77,000	1	\$77,000	\$77,000
Assistant Administrator	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$50,000	\$50,000
Finance Officer	0	\$35,000	\$0	1	\$35,000	\$35,000	1	\$35,000	\$35,000	1	\$35,000	\$35,000	1	\$35,000	\$35,000
Core Content Teacher(s)	3	\$40,000	\$120,000	5	\$40,000	\$200,000	7	\$40,000	\$280,000	7	\$40,000	\$280,000	7	\$40,000	\$280,000
Para Educator(s)	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Electives/Specialty Teacher(s)	1	\$40,000	\$40,000	2	\$40,000	\$80,000	2	\$40,000	\$80,000	2	\$40,000	\$80,000	2	\$40,000	\$80,000
Exceptional Children Teacher(s)	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Related Service Teacher(s)	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Contracted Personnel	.5	\$8,000	\$4,000	1	\$0	\$0	1	\$0	\$0	1	\$0	\$0	1	\$0	\$0
Food Service Staff	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Transportation Staff	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Staff Supplements	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Professional Development	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
<b>Total Personnel</b>	<b>6.5</b>	<b>\$250,000</b>	<b>\$291,000</b>	<b>11</b>	<b>\$242,000</b>	<b>\$442,000</b>	<b>13</b>	<b>\$242,000</b>	<b>\$522,000</b>	<b>13</b>	<b>\$242,000</b>	<b>\$522,000</b>	<b>13</b>	<b>\$242,000</b>	<b>\$522,000</b>
<b>Benefits:</b>															
Dental Insurance	6	\$100	\$600	11	\$100	\$1,100	13	\$100	\$1,300	13	\$200	\$2,600	13	\$100	\$1,300
Disability	6	\$100	\$600	13	\$100	\$1,300	13	\$100	\$1,300	13	\$100	\$1,300	13	\$100	\$1,300
Health Insurance	6	\$3,000	\$18,000	11	\$3,000	\$33,000	13	\$3,000	\$39,000	13	\$3,000	\$39,000	13	\$3,000	\$39,000

Lakehaven Academy

Life Insurance	6	\$100	\$600	11	\$100	\$1,100	13	\$100	\$1,300	13	\$100	\$1,300	13	\$100	\$1,300
Medicare	6	\$200	\$1,200	11	\$200	\$2,200	13	\$200	\$2,600	13	\$200	\$2,600	13	\$200	\$2,600
Retirement Plan	6	\$2,000	\$12,000	11	\$2,000	\$22,000	13	\$2,000	\$26,000	13	\$2,000	\$26,000	13	\$2,000	\$26,000
Social Security	6	\$600	\$3,600	11	\$600	\$6,600	13	\$600	\$7,800	13	\$200	\$2,600	13	\$600	\$7,800
Total Benefits	48	\$6,200	\$37,200	90	\$6,200	\$68,400	104	\$6,200	\$80,600	104	\$6,000	\$78,000	104	\$6,200	\$80,600
Vision Insurance	6	\$100	\$600	11	\$100	\$1,100	13	\$100	\$1,300	13	\$200	\$2,600	13	\$100	\$1,300
<b>Total Personnel Budget</b>	54.5	\$256,200	\$328,200	101	\$248,200	\$510,400	117	\$248,200	\$602,600	117	\$248,000	\$600,000	117	\$248,200	\$602,600

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



**Operations Budget: Expenditure Projections 2014-15 through 2018-2019**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>2014-2015</b>	<b>2015-2016</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>
Books and Supplies	Copy Paper	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
	Curriculum/Texts	\$1,000	\$2,000	\$2,000	\$2,000	\$2,000
	Instructional Materials	\$1,000	\$1,000	\$2,000	\$2,000	\$2,000
	Other	\$0	\$0	\$0	\$0	\$0
	School Supplies	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
	Testing Supplies	\$0	\$0	\$0	\$0	\$0
Human Resources Costs	Legal Counsel	\$0	\$0	\$0	\$0	\$0
	NC Wise	\$0	\$0	\$0	\$0	\$0
	Personnel Software	\$0	\$0	\$0	\$0	\$0
Other	Audit Fee	\$27,650	\$27,650	\$27,650	\$27,650	\$27,650
	Food Plan	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
	Insurances	\$0	\$0	\$0	\$0	\$0
	Key Fob Installation (One Time Fee)	\$2,062	\$0	\$0	\$0	\$0
	Marketing Plan	\$0	\$0	\$0	\$0	\$0
	Transportation Plan	\$0	\$0	\$0	\$0	\$0
	Travel Expenses	\$0	\$0	\$0	\$0	\$0
Rents and Debt Services	Custodial Supplies	\$1,250	\$1,250	\$1,250	\$1,250	\$1,250
	Extermination	\$0	\$0	\$0	\$0	\$0
	Facility Lease/Mortgage	\$42,300	\$60,000	\$60,000	\$60,000	\$60,000
	Maintenance	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Rent of Equipment	\$0	\$0	\$0	\$0	\$0
	Security/Alarm	\$650	\$650	\$650	\$650	\$650
Technology Hardware	Copier/Scanner	\$0	\$0	\$0	\$0	\$0
	Copier/Scanner	\$400	\$400	\$400	\$400	\$400
	Instructional Software	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
	Network/Internet	\$500	\$1,000	\$1,000	\$1,000	\$1,000
	Office Software	\$900	\$900	\$0	\$0	\$0
	Other	\$10,000	\$11,000	\$10,000	\$10,000	\$10,000
Utilities	Electric	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600
	Energy	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
	Phone	\$1,400	\$1,400	\$1,400	\$1,400	\$1,400
	Water/Sewer/Trash	\$325	\$325	\$325	\$325	\$325
Total Operations		\$105,037	\$123,175	\$122,275	\$122,275	\$122,275

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

**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>2014-2015</b>	<b>2014-2015</b>	<b>2015-2016</b>	<b>2016-2017</b>	<b>2017-2018</b>
TOTAL EXPENDITURES (PERSONNEL)	\$328,200	\$510,400	\$602,600	\$600,000	\$602,600
TOTAL EXPENDITURE (OPERATIONS)	\$105,037	\$123,175	\$122,275	\$122,275	\$122,275
TOTAL EXPENDITURES	\$433,237	\$633,575	\$724,875	\$722,275	\$724,875
TOTAL REVENUE	\$435,128	\$824,944	\$1,006,558	\$1,078,455	\$1,078,455
ANNUAL NET PROJECTIONS	\$1,891	\$191,369	\$281,683	\$356,180	\$353,580

**Budget Narrative:** (No more than one and a half pages)

Please include additional information that showcases all assumptions for your budgetary calculations.

- 1. Describe the budgetary projections and explain the analysis utilized to project these specific enrollment figures. If your budget projections are lower than anticipated, how will the school adjust this budget and what is the determined break-even point for student enrollment?*

Due to the fact that our program is starting so small, our actual projected funding at the time of this application is small- the only income we are counting on which is sure as of this moment in time is the amounts of the state, local, and anticipated federal funding. We plan to participate in writing many grant proposals from now and throughout the life of the charter school, as well as creating a lot of creative opportunities for fundraising on the campus as the school develops and grows. We have already begun reaching out to various local and national entities and corporations in order to pursue diverse partnerships which could be mutually beneficial for the school and the entity; however, as no proposals/agreements have been formalized, this information has not been included in the application.

- 2. Describe the systems and processes by which the school will manage accounting, purchasing, payroll, and audits. Specify any administrative services expected to be contracted for the school, and describe the criteria and procedures for the selection of contractors*

The school administrator of Lakehaven will be the person responsible for managing and monitoring the budget on a long and short-term basis,; however, there will be a financial expert on the board who will contribute to the oversight of the budget on a regular basis to ensure accuracy, viability, validity, and transparency of the budget both on paper and in practice. A bi-annual audit will be conducted by a firm approved by the Local Governing Commission to ensure that the budget is successful in theory and in practice. All purchases require

- 3. Explain how the spending priorities align with the school's mission, curricular offerings, transportation plans, and professional development needs. Be able to depict in chart format and discuss in a narrative how the school will maintain a small, contingency reserve and operate using sound fiscal practices. As you construct the budget, include any and all documentation about cash on hand, bonds, real estate, or grants as part of this application package.*

Having highly talented educators and paying them well is of paramount importance, as we know that each student's experience of learning at the school will be significantly impacted by who is delivering the instruction. Basic operational costs account for a significant portion, such as rent and utilities. Next, programming and the supplies needed to effectively run the educational programming will be important factors in the budget.

- 4. Indicate the amount and sources of funds, property or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which are secured and which are anticipated, and include evidence of commitment for any funds on which*

*the school's core operation depends.*

None have been secured at the time of this application; however we intend to pursue funds through various grant writing opportunities as well as approaching foundations with a shared interest in seeing the students in our community flourish or who have a passion in innovative education. At this time we have no formalized commitments, but are actively establishing partnerships with business and entities whose products or services could benefit our school population in some way.

5. *Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated. What is the school's break-even student enrollment figure for each of the first five years?*

By opening with and continuing to operate on a conservative budget, we plan to stay within the fiscal limits of our budget; however, our contingency plan would include implementing an annual fee, not to exceed \$300.00 per family, to cover supplies. All fees would be clearly defined; i.e. the parents would know exactly what the purpose of the fee is, how it is actually being used, and it would be stated upfront, prior to acceptance of enrollment at Lakehaven, that there is this possibility. (For families in need, a payment plan could be an option).

6. *Year one cash flow contingency, in the event that revenue projections are not met in advance of opening.*

Right now we have written in a core budget that only includes state funding. As we do plan to actively fund-raise on the developing campus, but have not estimated what that total could amount to. During the start up phase, we will rely on donations, grants, partnerships which could and will likely be secured once initial approval is granted. There is also the option of seeking a small business loan through the non-profit of Lakehaven Academy, EduCreate.

**Financial Audits:** (No more than a half of a page)

*Describe the procedure and method for conducting an independent financial audit for the proposed charter school.*

Independent Financial Audits will be conducted bi-annually for the first 4 years of operation and annually every subsequent year. The auditor will not be a member of the board or school community or in any way affiliated with Lakehaven; therefore we will have an objective, clear eye towards our budget- theory and practice and can advise us and ensure that we are continuing to be fiscally responsible and accountable for our plan and actions.

*Provide the name and contact information of the firm approved by the NC Local Government Commission (LGC) that will conduct the audit. If a firm has yet to be identified please list the firms the board has investigated.*

Tinsley and Terry, CPA, PA  
19109 W. Catawba Ave.  
Suite 116  
Cornelius, NC 28036  
(704)895-7400

VI. AGREEMENT PAGE

**LEA Impact Statement:**

Pursuant to G.S. 115C-238.29B(d), the charter school applicant must submit a copy of the application to the LEA in which the school will be located. The applicant must submit their application to the LEA within **seven (7) days** from the due date so that proof of submission can be included in the complete application packet. The LEA may then submit information or comment directly to the Office of Charter Schools for consideration by the State Board of Education.

**Applicant Signature:**

The foregoing application is submitted on behalf of Lakehaven Academy (*name of non-profit corporation or individuals submitting application*). 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.

Print/Type Name: lakehavenacademy

Board Position: board member

Signature: \_\_\_\_\_

Date: 02/27/2013

Sworn to and subscribed before me this  
\_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Notary Public Official Seal

My commission expires: \_\_\_\_\_, 20\_\_\_\_.