



NORTH CAROLINA CHARTER SCHOOL APPLICATION

Bastiat Classical School

Public charter schools opening the fall of 2015

Due by 5:00 pm, December 6, 2013

North Carolina Department of Public Instruction
NCDPI/Office of Charter Schools
301 N. Wilmington Street
Raleigh NC 27601-2825
919-807-3491

Mailing Address:
6303 Mail Service Center
Raleigh, NC 27699-6303

CHARTER SCHOOL 2013 Application Process

To open a charter school in the 2015-2016 school year

APPLICATION DUE DATE/TIME

- September 6, 2013** A letter of intent to apply for the 2015-2016 school year **must** be received electronically to Deanna Townsend-Smith in the Office of Charter Schools **no later than 12:00 noon at deanna.townsend-smith@dpi.nc.gov**. 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.
- December 6, 2013** A complete online application package, in the Office of Charter Schools **by 5:00 pm.**
- December 13, 2013** A copy of the application due to the Local Education Agency in which the proposed charter school will reside in. Applicant must provide an attached PDF version as evidence to the Office of Charter Schools (i.e. signed letter).

APPLICATION SPECIFICATIONS

Applicants can submit applications prior to the deadline December 6, 2013 at 5:00 pm. **All applicants must be submitted using the online portal** and applicants are to use the following specifications:

1. All required Appendices should be clearly titled, include page numbers (i.e. Appendix A and page numbers as- A1, A2, B1...), and submitted as a FULL PDF document.
2. Review all elements of your application for completeness before submitting. **An incomplete application will result in the elimination of the application.**
3. Late submissions **will not** be accepted. No exceptions.
4. Provide confirmation electronically to the Office of Charter Schools to deanna.townsend-smith@dpi.nc.gov 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: Bastiat Classical School

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

Name of non-profit organization under which charter will be organized or operated: *Bastiat Classical School*

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: *Judith Malveaux*

Title/Relationship to nonprofit: *Board Member*

Mailing address: 5349 Magnolia Tree Lane
Charlotte NC 28215

Primary telephone: 504-220-9677 Alternative telephone: 443-745-6825

E-Mail address: *judithamalveaux@gmail.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: X

Yes:

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

No: X

Yes:

What is the name of the nonprofit organization that governs this charter school? *Bastiat Classical School*

Is this application for Virtual charter school: Yes: No: X

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2015 Month August

Will this school operate on a year round schedule?

No: X

Yes:

Proposed Grade Levels Served and Total Student Enrollment (

10

Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
First Year	K,01,02,03,04,05,06	408
Second Year	K,01,02,03,04,05,06,07	483
Third Year	K,01,02,03,04,05,06,07,08	558
Fourth Year	K,01,02,03,04,05,06,07,08	583
Fifth Year	K,01,02,03,04,05,06,07,08	608
Sixth Year	K,01,02,03,04,05,06,07,08	633
Seventh Year	K,01,02,03,04,05,06,07,08	633
Eight Year	K,01,02,03,04,05,06,07,08	633
Ninth Year	K,01,02,03,04,05,06,07,08	633
Tenth Year	K,01,02,03,04,05,06,07,08	633

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 initial 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 will result in disqualification from the application process or revocation after award. I understand that incomplete applications will 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 non-profit organization.

bastiatschool
Signature

Weston Burroughs
Title

bastiatschool
Printed Name

12/06/2013
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:

Bastiat Classical School nourishes the lives of students and families by providing a classical education, enriched by an emphasis on literacy and critical thinking, and founded upon high academic and personal expectations.

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.*

The Bastiat Classical School will serve all students who are eligible to attend public school in North Carolina. Bastiat will market the school to a geographically, ethnically, and financially diverse population with the intent of welcoming all students and reflecting the population of the county. Bastiat will not target a specific demographic or population. The Bastiat program will provide a high quality foundational education to students with a wide range of abilities, backgrounds, and experiences.

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

The total projected enrollment for the Bastiat Classical School is 408 students in year one. The first year enrollment makes up less than one half of one percent of Charlotte-Mecklenburg Schools ADM when comparing the same grades.

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

The Bastiat Classical School will use the Core Knowledge sequence as its curriculum that aligns with the Common Core standards, the North Carolina Essential Standards, and the North Carolina Standard Course of Study. The school will also use Calico Spanish for one of its specials. The school plans to teach Saxon Math and Shurley English to further lift academic expectations. The Bastiat Classical School will have debate teams on each grade level. Each grade will debate topics daily, first learning the facts, then formulating an opinion, then lastly, the students will articulate their opinion.

The combination of these cohesive programs will provide Bastiat students with a foundation of knowledge, critical thinking skills, and the ability to express themselves that will prepare them to succeed in any high school.

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.*

Bastiat Classical School will achieve the following legislated purposes:

1. Bastiat will create new professional opportunities for teachers. Teachers at Bastiat will be rewarded for excellence with a merit based performance incentive program. Teachers will be involved in the decision making process for the school, serving on the School Improvement Team, the Parent/Teacher Organization, and various board committees. Bastiat teachers will also be given the opportunity to teach using structured programs that will help each student reach his or her potential, while giving teachers more time to focus on the daily interactions with their students. Bastiat teachers will benefit from a collaborative cultural where every stakeholder is working to achieve a common mission and goals.

2. Bastiat will be held accountable for meeting measurable student achievement results in many ways. Bastiat will be a part of the NC Accountability Model, participating in the EOGs and EOCs when appropriate. As is the case with any charter school, the state will hold Bastiat accountable for meeting minimum levels of growth and proficiency. The board of directors will also hold the school accountable for meeting school-wide achievement goals. Using data including student performance on the NWEA MAP, the board will continually monitor the progress of the academic program. Finally, parents will hold Bastiat accountable for student achievement.

3. Bastiat will provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system. As a classical school which will stress the basics of a foundational education, Bastiat will be very different from district schools in the area. With structured curricular tools, teachers who will act as teachers instead of facilitators, Spanish classes starting in kindergarten, and a focus on literacy and critical thinking, Bastiat will offer a very different educational experience for the students who choose to enroll there.

4. Bastiat will improve student learning. The founding board of Bastiat has chosen research based, proven curricular programs that will offer students the opportunity to receive an excellent education. Teachers will work collaboratively in Professional Learning Communities (PLCs) where they will use available data to inform instruction and improve student learning. The Northwestern Evaluation Association (NWEA) Measures of Academic Progress (MAP), a computer adaptive, standardized test, will be given to students two or three times per year. Detailed results from the NWEA MAP will help teachers evaluate the specific strengths and weaknesses of each student, allowing for more effective instruction and classroom differentiation.

5. Bastiat will increase learning opportunities for all students. As a classical school with a rigorous curriculum, Bastiat will offer high achieving students a challenging, foundational education. At the same time, Bastiat will have strategies and interventions in place to ensure the success of students who may struggle.

6. Bastiat will encourage the use of different and innovative teaching methods. Core Knowledge lends itself to a variety of teaching methodologies, allowing teachers to use the best techniques for reaching each student and helping him or her reach his or her full potential.

Goals for the Proposed Charter School:

- 1. 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. Address how often and when the information will be communicated to the governing board and other stakeholders. These goals should include specific and measurable performance objectives over the first five years of the school's existence.*

1. The Bastiat School's average test score will be 3% higher than the state average on the End of Grade and End of Course tests by the end of the school's 3rd year in operation.

Strategies include: providing a rigorous, content rich curriculum; using formative assessments and NWEA results to inform instruction and improve learning; working collaboratively in PLCs to improve classroom differentiation.

Goal 1 will be measured by student performance on annual state tests administered annually.

2. At least 90% of Bastiat's students will achieve more than a year's worth

of growth on the NWEA by the end of the school's 3rd year in operation.

Strategies include: providing a rigorous, content rich curriculum; using formative assessments and NWEA results to inform instruction and improve student learning; working collaboratively in PLCs to improve classroom differentiation; developing intervention plans for students who are struggling; and providing teachers with high quality professional development.

Goal 2 will be measured by student performance on NWEA MAP tests from fall to fall.

3. Each year, 90% of Bastiat parents will be satisfied or highly satisfied with their child's school.

Strategies include: involving parents in the decision making process of the school; providing a welcoming and inviting atmosphere where parents feel valued and respected; supporting a strong Parent/Teacher organization; offering parents multiple times throughout the year to communicate with staff members, both formally and informally; and communicating school and student information in a timely and convenient manner.

Goal 3 will be measured by an annual parent satisfaction survey and the rate of student attrition.

4. Students who attend Bastiat for three full years will be at or above grade level in reading and math by the end of their third year in attendance.

Strategies include: developing intervention plans for struggling students; providing teachers professional development on classroom differentiation; using formative assessment and NWEA data to inform instruction and improve student learning.

Goal 4 will be measured by student performance on the NWEA MAP from fall to fall and state tests administered annually.

The school's School Improvement Team will analyze data and recommend adjustments to the school-wide goals to the academic committee of the board. Because of the expectation that the goals will be continually evaluated and adjusted if necessary, developing realistic goals beyond the first three years is not possible.

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

The governing board will receive monthly reports from the head of school, the academic committee, the School Improvement Team (SIT), and the Parent-Teacher Organization. When receiving these reports, the board will evaluate the school's progress and adjust the goals if needed. The board will also have a member visit the school every month to check in on the daily activities to make sure all the goals are being worked on.

The board will at least annually, at the annual meeting or board retreat, analyze and evaluate the school's progress and goals. The board will

consider periodic recommendations from the SIT and the academic committee to adjust the school-wide goals.

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 will 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.

The Bastiat Classical School is committed to meeting the needs of every student. Bastiat's instructional program will be anchored by the Core Knowledge curriculum which is aligned with the NC Common Core State Standards, and will be supported by Core Knowledge Language Arts program, Saxon Math, Shurley English, and Calico Spanish. Additional special classes in art, music, and PE will round out the Bastiat instructional offerings.

The Core Knowledge curriculum is a comprehensive, coherent, content-rich program designed to provide students with a solid base of background knowledge. The specificity of the Core Knowledge content helps eliminate gaps and repetition. Students who come to Bastiat with limited knowledge and experiences will be exposed to rich and varied texts and in-depth historical profiles that will broaden their understanding of the world around them. Students who already have a broad base of knowledge will find that the Core Knowledge sequence allows them to experience the material in a new way, opening them up to new perspectives and deeper comprehension. Cross-curricular connections resulting from content alignment across disciplines will help all students comprehend and retain subject matter. Specials teachers, especially in art and music, will align lessons with language arts and history topics to maximize these connections.

The Core Knowledge Language Arts program will be used to teach students the fundamentals of reading. A phonics based approach emphasizes phonics and listening comprehension, which surpasses reading comprehension in the elementary grades. The use of frequent read-alouds will allow students to access content and knowledge well beyond each student's ability to comprehend what they are able to read themselves. Core Knowledge Language Arts aligns seamlessly with the Core Knowledge sequence to provide students increased cross-curricular connections that reinforce learning objectives.

Shurley English will be used to teach students the basics of grammar, syntax, and sentence structure. The Shurley method engages students through songs and jingles, but is structured to provide a coherent approach to the subject, ensuring continuity of instruction.

Using Saxon Math, students will learn in a way that continually reinforces previously mastered concepts. This spiraling of instruction reduces gaps in knowledge and competencies and also allows students to experience success on a regular basis, even if they struggle with a new concept.

Bastiat teachers will be able to use many methodologies, allowing teachers to use best practices and teach with confidence. Each student is a unique individual and may process information in different ways. Using a variety of teaching techniques will help reach each student in the way that he or she learns best. Teaching methods that Bastiat teachers may use include but are not limited to direct instruction, experiential learning, collaborative learning, and directed independent study.

To aid in the evaluation of student performance and competencies, Bastiat will administer the Northwest Evaluation Association (NWEA) Measures of Academic Progress (MAP) two or three times per year for students in grades 2-8. For grades K-1, Bastiat will administer the NWEA MAP for primary grades. The NWEA MAP is a computer adaptive assessment that gives teachers specific feedback about the content areas that need further development. Teachers will evaluate and analyze the NWEA data and use their conclusions to inform their instruction. Working in their PLCs, teachers will collaborate on best practices and instructional strategies to address deficiencies in student understanding.

K-5 Curriculum and Instructional Design:

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

The Bastiat learning environment will be in keeping with its classical design. Students in grades K-5 will be taught in self-contained classrooms with one teacher and a group of students. In kindergarten, the class size will be 20, in 1st through 3rd grade, the class size will be 22, and in 4th and 5th grade the class size will be 25.

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 the elementary division 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.*

Core Knowledge is aligned with the North Carolina Common Core State Standards. It will also support the school's mission of providing a classical education with an emphasis on literacy. The rich and specific content of the Core Knowledge sequence supports the classical learning model of the grammar stage where students are to acquire the knowledge and information that will help them later when they are learning to synthesize what they know in a logical, comprehensible way through the dialectic stage and then when they are learning ways to express what they know and understand in the rhetoric stage.

- 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.*

While the content and sequence of Core Knowledge is regimented, it lends itself to a wide variety of instructional methodologies that will allow

teachers the freedom to use the method that best reaches each student. Bastiat teachers will use a variety of instructional strategies including but not limited to direct instruction, experiential learning, collaborative learning, and directed independent study. Teachers will also receive training in classroom differentiation and best practices for remediating students who are struggling.

Core Knowledge provides resources for teachers to help them address the needs of students with a wide range of differences and abilities. Teachers will also receive extensive professional development in instructional methods, allowing them to adjust their lesson plans and instruction to ensure each student's success.

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

The calendar reflects the school's commitment to academic excellence by including 185 instructional days. When possible, the Bastiat calendar will be aligned with the local LEA's calendar to accommodate families who may have students in more than one school.

6-8 Curriculum and Instructional Design:

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

The 6-8 learning environment will reflect the school's classical design. Students will be grouped by subject, and in some cases ability, and learn in classrooms with one teacher. The average class size will be 25, but may vary because of scheduling and course offerings. Students in the middle grades will change classes and therefore have multiple teachers over the course of the school day.

Provide a synopsis of the planned curriculum, including:

1. **One** *sample course scope and sequence (preferably in graph form) in the Appendices (Appendix B1) for one core subject (specific to the school's purpose) for the middle school division 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.*

Core Knowledge is aligned with the North Carolina Common Core State Standards. It will also support the school's mission of providing a classical education with an emphasis on literacy. The specific, rich content of the Core Knowledge sequence supports the classical learning model of a grammar stage where students are to acquire the knowledge and information that will help them later when they are learning to synthesize what they know in a logical, comprehensible way through the dialectic stage and then when they are learning ways to express what they know and understand in the rhetoric stage.

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.

While the content and sequence of Core Knowledge is regimented, it lends itself to a wide variety of instructional methodologies that will allow teachers the freedom to use the method that best reaches each student. Bastiat teachers will use a variety of instructional strategies including but not limited to direct instruction, experiential learning, collaborative learning, and directed independent study. Teachers will also receive training in classroom differentiation and best practices for remediating students who are struggling.

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5. *Describe in a brief narrative below on how the calendar coincides with the tenets of the proposed mission and education plan.*

The calendar reflects the school's commitment to academic excellence by including 185 instructional days. When possible, the Bastiat calendar will be aligned with the local LEA's calendar to accommodate families who may have students in more than one school.

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.*

Bastiat Classical School will employ multiple strategies to ensure the success of all students. These strategies include tutoring, modifications to the learning environment, increased school-home communication, increased classroom attention, and possible intervention by the School Support team.

When a teacher recognizes that a student is struggling, that teacher will communicate with the student and parents and make adjustments in the classroom. If the student continues to struggle, the teacher will schedule a meeting with the parent/guardian and discuss what possible interventions are needed. Teachers must not skip this step and must communicate these issues with the parent. The Powerschool Parent Portal will be used as one way for teachers to communicate with parents. Parents will be able to check their students attendance and grades on a daily basis. To ensure that this is an effective form of communication, teachers will be required to update the online grade book at least on a weekly basis. Parents will be encouraged to check the their child's attendance and grades online.

If a student continues to struggle in the classroom, the teacher or parent

may refer the student to the School Support team. After an initial evaluation, the team will then develop appropriate research-based interventions for the classroom. If those interventions do not prove effective, the student will then be referred to the EC teacher(s) to be evaluated for EC services.

Parents will be involved in every step of the process for addressing the needs of their students who may struggle.

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 ELL students.*
- c) *Plans for monitoring and evaluating the progress and success of ELL students, including exiting students from ELL services.*

A home language survey will be requested from every student at the beginning of each year. Ell students may also be identified by classroom teachers or other school personnel.

When possible and appropriate, Bastiat will use an immersion model for students identified as English Language Learners. Bastiat will designate a staff member to serve as an ELL coordinator. It will be the responsibility of the ELL coordinator to 1. ensure that the ELL student is able to fully participate in the school community 2. ensure timely and effective communication between the school and the parents of the ELL student 3. ensure the classroom teacher and specials teachers understand the ELL student's needs and make appropriate accommodations. If the immersion strategy is ineffective or otherwise not appropriate, other strategies will be used to address the needs of the student. These strategies may be pull-outs, providing educational material in the student's native language, tutoring, and the use of translators.

ELL students will have the same access to subject matter material and activities as the other students at Bastiat.

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.*

The Bastiat program is one that is inherently challenging and carefully designed to provide students with a solid foundation of knowledge and skills necessary for future success. Though the rigorous instruction will adequately meet the needs of many gifted students, should a student need a greater challenge, teachers will have the knowledge and flexibility to differentiate instruction to meet the needs of those students. In the middle grades, students may be ability grouped for the purposes of accelerating the math instruction for capable and motivated students.

Exceptional Children

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

As part of the enrollment packet that every student will receive, parents will have the opportunity to provide information about their child's existing IEP or 504 plan. Additionally, EC staff will examine all records from previous schools as they are received to determine if enrolled students have existing IEPs or 504 plans. Upon identification of students with existing IEPs or 504 plans, Bastiat EC staff will alert teachers and administrators and ensure compliance with any existing plans.

To help identify students who may be eligible for special education services, a School Support Team (SST) will be established. The SST will be made up of teachers and administrators. Students may be referred to the SST by administrators, teachers, or parents. Once referred, the SST will make a preliminary evaluation and, with the support and agreement of the parents, make recommendations for either research-based classroom interventions or further formal evaluations. The formal evaluations may be conducted by EC staff or qualified personnel contracted for such purposes.

If classroom interventions put into place are found ineffective, the SST will re-evaluate and either put new interventions into place or determine if the student's needs will be best served by an IEP or other special education services. At all stages of the process the student's parents will be informed and consulted. The SST will continue to monitor all students determined to have special needs or need special assistance until such time as they are determined to no longer need special services.

All student records will be maintained with confidentiality and safety in mind. Records will be kept in secure, designated, locked records rooms, in fire-proof file cabinets. Student records may be examined on site only by approved personnel, and should never be taken off site. A staff member will be designated by the lead administrator to oversee the student records and ensure compliance with all applicable laws.

Records will be requested from the student's previous school only after a complete enrollment packet has been received. Upon receipt, student records will be securely stored and treated with strict confidentiality.

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.*

Bastiat Classical School is committed to meeting the needs of all enrolled students. It will be the policy of Bastiat that every child have a fair and full opportunity to reach his or her full potential and that no child shall be excluded from appropriate educational offerings.

To ensure that we meet the needs of exceptional children, Bastiat will have an Exceptional Children Department staffed with licensed, highly qualified, well-trained EC teachers. The EC department will be tasked with the screening of all students referred by the School Support Team. The EC department will further be responsible for developing educational plans and strategies for special needs students. The EC department will take every reasonable measure to prevent denials of equal educational opportunity on the basis of physical, emotional or mental handicap; and will assure that the rights of students with special needs and their parents or guardians are protected.

The staff of Bastiat will be aware of students with an Individual Education Program (IEP) or a Section 504 plan and make sure that all requirements are being met as prescribed. The IEP will be updated regularly and adjustments will be made to accommodate each student. An EC teacher, classroom teacher, parent, and administrator will be given proper notification and invited to attend all meetings. There will be ongoing assessments in classrooms to identify students with special needs. Students with a Section 504 plan or identified as being eligible for a 504 plan will be offered accommodations and or services for the identified disability. Accommodations and services for both IEP and 504 plans will include but not be limited to: modification of tests and assignments, supplemental textbooks, adjusted seating, use of study guides and organizational tools, preferential seating, modified recess and PE, and use of necessary health care procedures.

The school plans to contract for related services such as speech-language, occupational therapy, and physical therapy with a company that has a proven track record and extensive experience with providing EC services to charter schools.

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 **ALL** students. These standards should set forth what students in the **last grade served** will know and be able to do. Be sure to include plans for the "At-Risk" population.*

Bastiat will set high expectations for the students, staff, and the school as a whole. The student performance goals are: by the end of the third year, student performance on the EOGs and EOCs will be 3% higher than the state average, 90% of students will achieve more than a year's worth of growth on the NWEA each year, and 95% of students who have been enrolled at Bastiat for all three years will be at or above grade level. Because it is impossible to know where students will be academically when they enroll at Bastiat, these goals are based on the performance of other charter schools with similar programs and the projected enrollment based on the area targeted for a permanent site. The goals will be continually evaluated and revised when necessary by the board with recommendations from the SIT and the academic committee.

The NWEA MAP will be used in addition to the required state assessments to measure student achievement and inform instruction. Classroom teachers will use individual student data to modify strategies and adjust instruction to meet the needs of the students in his or her class. Teachers will use grade level data in their PLCs to adjust lesson plans and instruction based on the needs of the students in each grade. The SIT and the board academic committee will use school-wide testing results to make recommendations to the board about school wide initiatives and programs designed to address deficiencies.

Students who meet or exceed the state standard requirements, where they exist, and have met all of the grade level requirements will automatically be promoted to the next grade. If a student is at risk of being retained, the student's classroom teacher will contact the parents as soon as possible. The teacher, parents, and other necessary staff will formulate a personal education plan which may include a referral to the SST. It will be the policy of Bastiat to give each student the tools and support that he or she needs to be successful. If the interventions and support do not result in the student meeting the requirements to be promoted to the next grade, the head of school, with input from the teacher, parent, and other staff, will make the final decision on whether or not to retain the student.

If a student has either an IEP or a 504 plan, the decision to retain or promote that student will be made with the support of the EC staff and consideration will be given to the student's plan and accommodations.

All of the school policies and procedures, including promotion and retention policies, will be available to parents and students in the student handbook and on the school website.

The following are the exit requirements for students leaving 8th grade: students will demonstrate strong reading, writing, listening, spelling,

speaking, and presentation skills using multiple forms of expression, which are age and grade level appropriate. Students will be able to read and interpret multiple forms of writing including poetry, fiction and non-fiction. Students will have an understanding of the U.S. government, its history, and governing documents. Students will have a basic understanding of the science topics as outlined in the North Carolina Standard Course of Study. Students will have mastered grade level and age appropriate math skills and be prepared to enter Math I in 9th grade.

With the help of the NWEA MAP, students who are at risk of not meeting the objectives to successfully exit 8th grade will be identified early, usually in previous grades, and appropriate interventions will be put into place.

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 specific to the proposed charter school within the appendices (Appendix D).

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.*

It is the goal of Bastiat Classical School to provide a safe and orderly environment for students, parents, and staff. To this end, Bastiat will set high behavior expectations for each student. Teachers will formulate, communicate and model clear behavior expectations based on the idea that everyone should show kindness and respect. School-wide behavior expectations will be displayed throughout the school, discussed during assemblies, and consistently enforced.

The disciplinary process will consist of four levels:

Level 1: Most instances of misbehavior can be addressed by the classroom teacher and every teacher will receive training in classroom management and strategies to address inappropriate or disruptive behavior. Teachers will keep parents informed if their student's behavior is not meeting expectations. If misbehavior persists or rises to a Level 2 offense, then the classroom teacher will refer the student to the administration. Examples of Level 1 behavior include but are not limited to talking out of turn, refusal to participate, not cleaning up after making a mess.

Level 2: Repeated Level 1 behaviors or more serious misbehavior will result in a referral to the head of school. The head of school will meet with the student and parents to formulate a corrective action plan that may include disciplinary measures. Possible consequences of a Level 2 offense include

but are not limited to after school detention, in-school suspension, think sheets, and suspension from extra-curricular activities. Examples of Level 2 offenses include leaving class without permission, disrespect of authority, and non-compliance with dress code.

Level 3: If Level 2 misbehavior persists in spite of the corrective action plan or are more serious, the head of school will meet with the student and the parents and formulate a corrective action plan that may include an out of school suspension of no more than 10 days. Examples of Level 4 offenses include disobeying school personnel, cheating, stealing, harassing others, and destruction of school property.

Level 4: If corrective action plans do not result in adjusted behavior, or if the misbehavior rises to a Level 4 offense, the head of school will meet with the student and the parents and may recommend long term suspension or expulsion. Examples of Level 4 offenses are possession of drugs, threats to others, possession of weapons, and assault.

A parent may appeal a Level 3 or Level 4 disciplinary action by submitting a written notice of appeal to the head of school within 24 hours of being notified of the action. The head of school will immediately notify the Board of Directors who will schedule a meeting to hear the appeal. The parents will be notified of the date, time and place of the meeting and requested to attend. The decision of the Board regarding appeals of disciplinary measures will be final.

When considering discipline of students with special needs, the head of school, with the help and consultation of the EC teacher, will review the students file including his/her IEP or 504 plan. The head of school will take into account any accommodations or interventions in place and whether or not the misbehavior is a manifestation of the student's disability, and work with the parents to ensure that all of the student's rights are protected.

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: Bastiat Classical School

Mailing Address: 5349 Magnolia Tree Lane

City/State/Zip: Charlotte NC 28215

Street Address: 5349 Magnolia Tree Lane

Phone: 504-220-9677

Fax:

Name of registered agent and address: W E Goodall
2132 Greenbrook Pkwy.
Weddington, NC 28104

FEDERAL TAX ID: 46-4201593

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 E)
X 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 initial members of the nonprofit organization.

Board Member Name	Board Title	County/State of Residence	Current Occupation
Mary C. Sauer	Member	GUILFORD	Academic Advisor

			and charter founder
Judith Malveaux	Vice Chairman	MECKLENBURG	Communications consultant
Stephen Rosenburgh	Treasurer	MECKLENBURG	CEO, US Developments
Cynthia Roeth	Member	MECKLENBURG	Parenting Consultant
Cecilia Ramirez	Member	MECKLENBURG	Executive, Community leader
Jim Stegall	Secretary	UNION	College Spanish instructor
Weston Burroughs	Chairman	UNION	Automobile business, former principal
Jane Young	Member	WAKE	Retired EC teacher and principal

Please provide the following in this location of the APPLICATION:

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.*

Structure and function:

Governance of the school is the direct responsibility of the Bastiat Classical School Board of Directors ("Board") whose paramount goal is the educational success of its students.

Bastiat Classical School ("School") is a non profit North Carolina corporation and will file an application for a federal determination of IRS Section 501(c)(3) status upon learning of the application's approval by the State Board of Education (SBE).

The School's Board shall have the fiduciary duty for student learning as well as fiscal stewardship. This responsibility and accountability is to all stakeholders including parents and students, staff, the SBE, and the general public. In addition to the above fiduciary duties the Board must define its mission and success and how success will be measured. It will create short and long range plans to achieve the success and adopt policies, hire a head of school, approve of hiring of staff, and prudently manage resources. The Board will create capacity for leadership throughout the organization and a culture to nurture and reward that important leadership.

Lead Administrator:

The hiring of the Lead Administrator will be one of the most critical decisions the Board makes. The Board, as a whole, will have the sole authority to hire and fire the Lead Administrator. A search committee will be selected by the Board after the application approval by the Charter School Advisory Board ("CSAB"). This committee will include board members but may include non board members from the community or others affiliated with the school.

Since the final SBE approval of the application will not be until January, 2015, the committee will have ample time for this important process. First, the committee will elect a chair unless the Board made that selection in its creation of the committee. Next it will create a position description to the extent not done earlier by the board. The committee will determine in conjunction with the Treasurer, a recommended salary or range and the attendant benefit structure. Next advertising copy will be designed and such will be distributed in "free" media to the extent possible, including distribution of the ad to charter groups across not only North Carolina but other states. A pre-screening, with attention to employment laws, confidentiality and record retention, then will net a list of candidates who may have the minimum qualifications for the position. An interview process may follow narrowing that number to a predetermined number. Upon the selection by the committee of their choices of the well qualified candidates, the committee shall give the final candidates to the Board for Board-candidate interviews and final selection by the full Board.

- 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.

Board size:

The Board shall be comprised of from five (minimum permitted) to thirteen members. We have that range because over time and circumstance larger or smaller boards may work better for our school and there is no reason to create artificial limitations. We have made it easy to change the number of members by requiring only a 60% vote in a duly held meeting. However, to remove a member, a serious action, a more stringent, 2/3 vote is required in our bylaws (which are attached in the Appendices).

Our Board will be headed by a chairman, a vice-chairman, a secretary, and a treasurer, elected by the Board but other officer positions, ad hoc or permanent, may be added by a 2/3 vote. All officers and members will serve 3-year terms with no member serving more than 3 consecutive terms. Terms will be staggered so that only three directors' terms will expire in any one year. Our fiscal year end will be June 30. Officer terms are for only one year with officer elections every August at the annual meeting. The initial Board members' terms shall expire at August, 2015 and thereafter the three year terms will apply.

Board powers and duties:

The Board has the power and the attendant responsibilities accompanying those powers. The Board's powers include establishing a mission and goals, determining success thereof and measuring it, strategic planning, and monitoring success with the requisite alternate actions and strategies to achieve success.

Governing Board skills, expertise:

Our governing board will begin with eight board members. We anticipate adding some parent board members, perhaps two, after we receive approval from the SBE and can identify parent applicants demonstrating areas of value to the board. Of the eight we have, one has been a charter school principal and one a superintendent.

A brief description of experience and expertise follows and of course a full page biography is in the Appendices.

Stephen Rosenburgh: CEO, U.S. Developments,

Weston Burroughs: Middle school principal of charter

Cecelia Ramirez: Executive, World Affairs Council, Latin American Chamber of Charlotte, former teacher

Judith Malveaux: Education news reporter and communications specialist with CMS

Cynthia Roeth: Parenting Consultant

Jim Stegall: Founding board member of charter, high school teacher, university Spanish instructor

Dr. Jane Young: School superintendent and EC teacher

Mary Catherine Sauer: Cornerstone Charter Academy founding chair

a) Educational/Operational success: We have 4 educators, 1 of whom has been a principal and 1 a superintendent. These leaders were already chosen for those jobs because of the personal and professional skills and leadership

they possess. We have the former Chairman of the Char-Meck Planning Commission and real estate developer to help lead fundraising and finances as well as a Charlotte businesswoman and community leader. The group's range of types of schools, students, instructional systems, and boards they reported to will provide the School with the excellent diversity that is critical to an effective board.

b) Because our board members have themselves been Lead Administrators they have been given missions and measurable academic and operational objectives and are used to having to deliver those objectives to a watchful board.

c) The school principals have been the key or central figure in carrying out the directions of the boards they worked for and in those positions, were the most focal points for the parents and the school community. So they already know what the job entails and will be vigilant in their observation of the Lead Administrator's performance and conduct representing the Board and school. Judith Malveaux was a communications specialist with the CMS system and her job was dedicated to apprising key stakeholders of CMS activity.

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 board consists of professionals already involved in charter schools who recognized a common desire to start charter schools in a geographic area with little or no access to available charter school seats. The founding board members believe they have gleaned common characteristics of successful charters and want to put their charter knowledge and experience to work. The idea of the school was that of Eddie Goodall, Executive Director of the NC Public Charter Schools Association, and Anthony Rodriguez, its Director of Advocacy. They reached out to professional associates who have a passion for charters but more importantly, skills and experience to create successful public charter schools. All eight board members have charter experience.

If a position becomes vacant the board will determine what the board has lost in terms of expertise, experience, leadership, influence, etc. and only then decide how quickly that resource needs to be replaced. The board recognizes that board membership is vital and that removing, replacing or adding a member is a critically important function of the board. The CPA firm of LB&A, CPAs, in Mecklenburg County, has volunteered financial and administrative assistance to the school to augment that of Rosenburgh and Ramirez.

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

Bylaws: Annually each August and monthly. Special by chair or board majority.

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 J).*

The board will develop a guideline for existing and new board members that requires a commitment to read

a summary or text of: the charter school statutes and how to find the complete statutes online, the Open Meetings Law, Public Records Law, State Board of Education TCS-U "Charter Schools Administration" policies, the school's charter contract, the board bylaws including the conflict of interest policy, and this charter application. Additionally, new board members will be required to spend time in the school classrooms. For continuing education of the board, the members will: attend board training offerings by the Office of Charter Schools, training by board consultants including board retreats, attendance and participation in the annual charter conference provided by the NC Public Charter Schools Association, and other opportunities for the board's growth and improvement. The board will develop a timetable and specific individual requirements for the training and will establish a minimum amount of time annually for such continuing professional development. The timetable for the Office of Charter Schools prior to school opening board training, pursuant to the SBE policy, will be followed by the board and all members, barring emergencies, will be required to attend and have been apprised of that prior to becoming board members.

Training involves interaction also and the board acknowledges that it does not exist in a vacuum and members will be encouraged to be involved in community activities in which they can both advocate for the school but also give back to the community that supports it.

- 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.*

Standards:

Regarding ethics, the board members have a fiduciary responsibility to the school to not only avoid or disclose conflicts of interest, but to act in a manner that credits the board, the school, and public charter education. Currently the board has no written ethics policy but will consider the need and implementation if it is in the best interest of the school.

The board has, however, defined in its bylaws "conflict of interest":

"A conflict of interest is a condition that exists when circumstances create, or are perceived to create, a risk that judgement or actions by a person or entity, regarding a primary interest, will be unduly influenced by a secondary interest of that person or entity. Interests may be pecuniary, professional, personal, or any interest that affects judgment or action."

When one occurs or may even appear to occur an affected board member should advise the board before any vote or even discussion of the issue. Also, other board members have the obligation to bring before the board any potential conflicts even if the issue involves another board member. If, in the board's opinion a conflict exists, then the member affected shall not participate in any discussion or vote on the matter in question.

Existing relationships: Judith Malveaux, Jim Stegall, Mary Catherine Sauer, and Dr. Jane Young are or have been involved, in very limited and primarily voluntary activity, with the NC Public Charter Schools Association. The Association is a non-profit charter advocacy and membership organization. As such it has no powers or authority to make decisions regarding the charter law, charter policies, or charter regulation. The three members therefore do

not have any conflict of interest other than the obvious desire for the Bastiat Classical School to become a member of the Association. The Association membership will entitle the school only to the same standing and benefits received by all other member schools.

Steps to avoid/mitigate: When conflicts arise they may be inadvertently overlooked and board action taken without addressing the conflict of interest possibility, which board action may then be suspect or damage the reputation of the whole board. To avoid or mitigate conflicts of interest the board chair will read the policy aloud before each meeting, and then ask the question if a conflict does exist, serving the members with the reminder and affirmatively giving them the chance (and time) to consider the question. The best policy to mitigate conflicts is to educate the board members and staff as to the practical meaning and interpretation of the COI policy.

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

First, policies should flow from need and to recognize and acknowledge need, the board will have public hearing time opportunities for the public and parents' input.

Good boards should be good stewards of their time for the school business. To allow the board to be most effective, the school will look at academically and operationally successful charters that most mirror our school, and look at those policies (and procedures) they have found to be successful. This collaborative sharing of best practices can be adjusted of course for our mission and goals.

For policy needs that are complex the board will appoint ad hoc committees to evaluate the need for a policy or policy change and make recommendations to the board. For simpler issues the board may address and decide on policy on a shorter term basis, without the need for a subcommittee. Of course for issues that require immediate attention, emergency meetings may be called for.

There are many resources the board may use to find and evaluate school and management policy including:

1. Web Based Resources in Appendix D of the Charter School Application Resource Manual (Office of Charter Schools)
2. Policy best practices from organizations including the National Alliance for Public Charter Schools, National Charter School Resource Center, Center for Education Reform, and many more.
3. Board training offered by the NCDPI OCS
4. Training offered at NC charter support organization conferences and networking events
5. Collaboration regarding policy and school improvement with Charlotte organizations like MeckEd and the CMS system and business community, e.g., the Charlotte Chamber of Commerce (recognizing that charters are also a business).
6. Recommendations for a school improvement team (below).

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.

A parent and teacher organization (PTO) will be the "driver" for providing activities such as extra-curricular programs, fundraising, community relations and events, and those traditional roles associated with this valuable component of the school. The PTO will report to the board monthly.

A School Improvement Team (SIT) will be monitor programs and instructional needs of the school. The lead Administrator will chair this committee which will also consist of staff, parents, a board member, and possibly volunteer consultants (to bring the most objectivity.) The SIT will report monthly to the full board of directors.

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

The process below was adapted from that of a charter applicant, Matthews Academy, Inc., with permission. Because the design of an effective grievance policy, including the Americans with Disabilities Act provisions, is important and complicated, it requires the advice of counsel. We will seek same upon our charter approval. The best conflict resolution is to avoid the conflict in the first place. Therefore, we will strive to develop a school culture that allows for fair complaint and dissent so that those issues between the grievant and the associated or affected second party, are more easily and earlier, resolved.

The staff grievance process first calls for the staff member to bring up any problems with his or her immediate supervisor. If the issue is not resolved, the staff member will then outline the problem in writing and deliver it to the head of school. If the issue is still not resolved to the staff member's satisfaction, an appeal can be made to the board by informing the board chairman, in writing, of the issue. Upon receiving a grievance from a staff member in writing, the board chairman will convene a special meeting of the board to address the staff members concern. Decisions made by the board of directors will be final.

The grievance process for parents is similar to that of the staff. Parents are asked to first address the issue with the staff member with which the parent or student has a grievance. If the issue is not resolved, a formal, written grievance may be submitted to the head of school. If the head of school is not able to resolve the issue to the satisfaction of the parent, he or she may request a hearing before the board of directors by submitting such request in writing to the board chairman. Upon receiving such a request for hearing, the board chairman will schedule a special meeting to address the parent's grievance. The decision by the board will be final.

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

Include in the Appendices:

1. 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). (Appendix F)
2. A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix G).

3. *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 H).*
4. *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 I)*
5. *Copy of any board policies if adopted already (Appendix J).*
6. *Copies of meeting minutes (if available), relevant to the development of the charter school plan, during the application process (Appendix K).*

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 M, 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, course offerings and align with the proposed budget.

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

The Bastiat School plans on recruiting high performing teachers who have a strong belief in the school's mission. The school plans on offering competitive salaries, a generous benefits package, sick leave, and paid time off. In order for the school to retain teachers, the Bastiat School will offer performance-based bonuses beginning as funds are available.

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.*

The employees of Bastiat will be employees of the Board of Directors. The Board will hire and directly supervise the principal who will, with the help of other administrators when appropriate, directly supervise the other staff members. The Board will approve all hires, position changes, terminations, staff policies, and staff procedures.

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

The Board will use a variety of methods for getting interested, qualified candidates. Once potential candidates are identified, the Board personnel committee or the head of school will further vet the candidates and make recommendations for interviews. The Board personnel committee, the head of school, and the head of school's hiring committee will all interview candidates before the head of school makes a recommendation to the Board of Directors for approval. The head of school's hiring committee will consist of staff members, and at least one parent. Upon approval of the Board of Directors, new hires will undergo a criminal background check. No candidate will be offered an unconditional offer of employment without passing a criminal background check.

The head of school will be the direct supervisor of the staff. In that role, it will be his or her responsibility to notice any deficiencies in staff performance. Except for the most egregious offenses, the head of school will use available resources at his or her disposal to remediate and develop the staff member so that expectations are met. Forms of development can range from small corrections to formal plans of improvement. Plans of improvement will include clear performance expectations, support that the staff member will be offered to meet those expectations, and a reasonable, definitive timeframe for meeting those expectations. If, after being on a formal plan, the employee has still not demonstrated the expected improvement in performance, the head of school may recommend the employee to the Board for termination. The final decision to terminate an employee will belong to the Board of Directors. If an employee feels as though he or she has been wrongly terminated he or she may follow the formal grievance policy.

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

Head of School: \$75,000
Full Time Teachers: \$42,000
Elective/Part Time Teachers: \$20,000
Financial Secretary: \$26,000
Administrative Assistant: \$26,000
Custodian: \$24,000
EC Teacher: \$43,000
Teacher Assistants: \$15,000

6. Provide the procedures for employee grievance and/or termination.

The employee grievance policy will offer employees a process for resolving situations in which they feel they have been wronged. The first step in the grievance process is for the employee to speak to his or her immediate supervisor about the problem. If the issue is not resolved to the employee's satisfaction, a written grievance may be submitted to the head of school. If the head of school does not resolve the issue, the grievance will be submitted to the Board personnel committee. If the committee does not resolve the issue, the employee may submit a written request for a hearing before the full Board of Directors.

The head of school, as the direct supervisor of the employees, will have the responsibility to evaluate and develop employees. If, after an appropriate attempt to develop the staff member, the head of school decides that the staff member is not a good fit for Bastiat, he or she will make a recommendation to the Board for termination. The final decision to

terminate an employee will rest with the Board of Directors.

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

Many staff members at Bastiat Classical School may have dual roles or responsibilities. Some employees may be hired as part time employees and may hold positions outside of Bastiat. Any employees with dual roles or responsibilities will be funded completely out of the general operating budget. Any EC teachers that are funded with federal EC monies will not have dual roles.

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

The special needs population, including ELL students, has been estimated based on the experience of other similar charter schools and staffing for the anticipated EC population is provided for in the budget. The process for hiring qualified EC staff is the same that will be followed for hiring other staff. Gifted students will be served by classroom teachers who have been trained in classroom differentiation and by a rigorous, challenging academic program.

9. 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).

Head of School: The head of school will be responsible for overseeing the day to day operations of the school. He or she will implement the policies approved by the board of directors and will, at the direction of the board, be responsible for all aspects of school operations. The head of school will supervise the school staff and ensure the school's compliance with all applicable laws, SBE policies, and testing procedures. The head of school must be committed to the mission of Bastiat and willing to work collaboratively to achieve the school-wide goals as set out in this application and the school improvement plan. Professional education experience and a master's degree in school administration is preferred.

Assistant Head of School: The assistant head of school will report to the head of school and perform duties delegated to him or her by the head of school. The assistant head of school will fulfill the duties of the head of school in his or her absence. The assistant head of school must be committed to the mission of Bastiat and willing and able to work collaboratively to achieve the school-wide goals. Professional education experience and a relevant advanced degree is preferred.

Teachers: Teachers will be responsible for teaching the subject matter, maintaining safe and orderly classrooms, working collaboratively to further the mission and goals of the school, maintaining accurate records, and contributing to the Bastiat community. All teachers must have a complete understanding of the subject matter, and a bachelor's degree. Teachers must be either highly qualified or have the ability to become highly qualified. Licensed teachers are preferred.

EC Teachers: EC teachers will be tasked with addressing the needs of students with special needs. EC teachers will provide continuing instruction and evaluation of students in the EC program. They will work closely with core subject teachers to ensure the needs of students receiving EC services are met. They will ensure compliance with all applicable laws

and regulations. EC teachers will be highly qualified and licensed.

Teacher Assistants: Teacher assistants will assist teachers as needed. A bachelors degree is preferred.

Business Manager: The business manager will facilitate purchasing, invoicing, payroll, and inventory. He or she will have a bachelor's degree and experience in financial management.

Office Manager: The office manager will be responsible for student data, attendance, communications, and oversight of office procedures. He or she will have a bachelor's degree.

Custodian: The custodian will clean the school as necessary and as directed by the principal.

Staff Evaluation and Professional Development

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

The head of school will be responsible for maintaining teacher licensure requirements and coordinating professional development.

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 head of school will be responsible for the professional development of all the staff, serving in effect as a mentor to all teachers and staff. Additionally, new teachers will be assigned experienced teachers to serve as mentors. Observations will be conducted in several different ways. The head of school (or assistant) will conduct formal classroom observations at least once per quarter. These observations will be followed up with feedback in a post-observation meeting with the administrator. Additionally, an administrator will conduct informal walk-throughs at least twice per quarter. The head of school will provide feedback from these informal observations in the form of a walk-through form that will be given to the teacher after the visit. For new teachers, mentors will also observe and provide feedback and support on a quarterly basis.

Retaining high quality teachers will be a priority for the administration and the board. Teachers will be surveyed once or twice per year. The survey results will be reported to the personnel committee and full board and will help inform the decisions that are made for the school. Teachers will be represented on the SIT, PTO, head of school's hiring committee, and various Board committees. A teacher evaluation rubric will be developed and used for the annual teacher evaluations. Indicators will include parent surveys, test scores, involvement in the Bastiat community, formal and informal evaluations, and additional roles and responsibilities. Scores from the rubrics will be used to determine annual raises and bonuses, if funds are available.

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

The staff development plan consists of three distinct kinds of development:

formal, individual, and small group.

Formal: The formal, staff-wide development will be delivered internally, sometimes by an administrator and sometimes by someone brought in with expertise on a specific topic. Formal development will include most of the before school professional development days and will also occur during many of the monthly staff meetings.

Individual: Individual professional development includes external, subject-specific training. For new teachers, mentors will provide valuable development in the form of frequent feedback and support. Instructional observations coupled with feedback from the head of school and other administrators (assistant head of school, department head, etc.) will provide further valuable professional development for our staff.

Small Group: Teachers will be expected to meet in small groups weekly. These Professional Learning Communities (PLCs) will serve as another way for teachers to evaluate their lessons, plans, and instruction.

- 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.*

The staff will have at least 7 days before school starts where formal professional development will take place. The following topics will be addressed:

Day 1: Bastiat's mission, goals, expectations, and staff handbook, employment benefits, and EC expectations, responsibilities, and procedures

Day 2: Core Knowledge training

Day 3: Core Knowledge training

Day 4: Core Knowledge training

Day 5: Health and Safety including training in epi-pens, allergies, blood borne pathogens, safety procedures, and discipline procedures

Day 6: PLC meetings and planning

Day 7: Evaluations, testing, grading

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.

After the first day of school there are not any plans to set aside any whole days for formal professional development. Individual and small group development will continue throughout the school year in PLCs, mentoring meetings, and frequent observations and feedback. There will also be times when individuals can take advantage of discipline specific instruction offered elsewhere. Formal development will continue in the monthly staff meetings.

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

If you have questions regarding the application process, please contact the Office of Charter Schools via email at deanna.townsend-smith@dpi.nc.gov.

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 Bastiat Classical School will hold multiple community meetings in the surrounding areas by teaming up with local business leaders and neighborhood organizations. The neighborhoods surrounding the school are diverse, located in between Grier Heights and Myers Park. The board plans to visit area churches and community centers to attract a diverse school population. School representatives will attend local events such as Festival in the Park to promote the school, handout flyers, and educate families. This will also be a time to handout letters of intent to parents. The board and volunteers will continue to promote the school through its Facebook page, Twitter feed, and website. The Bastiat Classical School will also purchase ads in the Charlotte Observer to promote the school.

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.*

The Bastiat Classical School will hold multiple community meetings from the time the school is approved through opening. The school plans to team up with local businesses and neighborhood organizations to host these public meetings. Bastiat Classical School plans to have meetings in the Chantilly, Grier Heights, Cotswold, Myers Park, and Sedgewood neighborhoods. Representatives from the school also plans to attend community-wide events to promote the opening (i.e Festival in the Park). At these events, the board and volunteers will hand out flyers and letters of intent. This will help the school get an estimate of enrollment numbers and seek out business partners for the school. The school has been collecting the emails of interested community members, business owners, parents, and teachers to start building a communications list. This list will be used to notify those interested of upcoming events that the school will hold.

Parents will be an integral part of Bastiat's success. Parents may serve on the board of directors, the School Improvement Team, the head of school's hiring committee, and will be the foundation of the Parent and Teacher organization. Bastiat School will also hold frequent events that will bring parents into the school and help promote a strong sense of community.

Admissions Policy

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

- 1. Tentative dates for the open enrollment application period; enrollment deadlines and procedures. *Please be advised schools cannot accept applications until after final approval from the SBE.*

2. *Clear policies and procedures detailing the open enrollment lottery plan including policies regarding statutory permitted student enrollment preferences.*
3. *Clear policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.*
4. *Explanation of the purpose of any pre-admission activities (if any) for students or parents.*
5. *Clear policies and procedures for student withdraws and transfers.*

The Bastiat Classical School will admit any child that is qualified to attend a public charter school under state law. The school will accept letters of intent by parents once the school is preliminarily approved. January 16th, 2015 or immediately following the approval, the Bastiat Classical School will open up applications for enrollment. The enrollment applications will begin at 5:00pm and will be available online. The school will continue to accept applications until April 3, 2015 at 5:00pm. At that time, the enrollment period will close. The following week on April, 10th 2015 at 6:00pm, the school will hold its lottery by picking names out of a bin for each grade. If needed, the Bastiat Classical School will accumulate a waiting list until January 2015, where the applications for enrollment will be opened again. If the school fails to reach full enrollment by the April 10th date, then the school will continue to accept enrollment applications until capacity is reached. As stated in the charter school law, any full time employees and founding board members with children will be allowed priority admission into the school. The school will allow multiple siblings to be admitted into the school by entering their family name into the lottery under one of the child's grade.

PROJECTED ENROLLMENT 2015-16 through 2019-2020

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.

	2015-2016			2016-2017			2017-2018			2018-2019			2019-2020		
	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
Kindergarten	60	0	0	60	0	0	60	0	0	60	0	0	60	0	0
Grade 01	66	0	0	66	0	0	66	0	0	66	0	0	66	0	0
Grade 02	66	0	0	66	0	0	66	0	0	66	0	0	66	0	0
Grade 03	66	0	0	66	0	0	66	0	0	66	0	0	66	0	0
Grade 04	50	0	0	75	0	0	75	0	0	75	0	0	75	0	0
Grade 05	50	0	0	50	0	0	75	0	0	75	0	0	75	0	0
Grade 06	50	0	0	50	0	0	50	0	0	75	0	0	75	0	0
Grade 07	0	0	0	50	0	0	50	0	0	50	0	0	75	0	0
Grade 08	0	0	0	0	0	0	50	0	0	50	0	0	50	0	0
	408			483			558			583			608		

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.

As stated in the North Carolina state charter school law, transportation will not be a barrier for any student attending the Bastiat School. The Bastiat School plans to have a carefully constructed carpool system that links families in certain areas to have transportation to and from the school. If there is a child without transportation, the school will look into bus and light rail passes (dependent on Charlotte's transportation plan).

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.

As stated in the North Carolina charter school law, no student will go without a lunch at the Bastiat School. The school will strongly encourage parents/guardians to provide a lunch for the student throughout the school year. If a parent or guardian is unable to provide a lunch for the student, the school will provide a balanced meal. Funds have been provided in the budget to purchase balanced meals for students.

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		\$1,741.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$3,332.00
Property Insurance	\$250,000		\$450.00
Motor Vehicle Liability	\$1,000,000		\$181.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other	\$1,000,000		\$8,514.00
Total Cost			\$14,550.00

Our lease will be supported by financial sponsor(s) who will provide a guarantee of lease payments for the first three years of the schools operations. Generally, we would expect to have a lease structure that will increase with the schools growth. The landlord will provide funding for property renovations to support the schools operating needs. The lease will amortize the cost of renovations over the 3 to 5 year period to reimburse the landlord for expenses. The first years lease terms will be below market to allow for adequate start-up vacancy with respect to enrollment.

The school will have a lease with an option to purchase agreement in years 3, 5, 7 and 10. A specific portion of the rent will be applied to the equity requirements at the time the school deems it appropriate to purchase the property.

At the time of purchase, the school expects to have a 15% to 25% equity requirement by the lender to exercise the purchase clause in the lease agreement. It is projected that lenders will provide debt at market rates on either a Tax-exempt or Taxable Bond Program. With the project enrollment growth exceeding lenders required minimum enrollment, the school does not foresee any issues with qualifying for funding. Our curriculum choice is in line with the Capital Markets requirements (i.e. our education curriculum is CORE Education Based and not too heavily focused on non-CORE endeavors).

The schools projected financial growth will allow adequate capital resources for the school to support any debt structure that the Board of Directors deems appropriate for the schools sustainability. This further supports our model to lease with property acquisition in mind. Historically, once a school has reached levels that support property acquisition, the annual facilities costs are reduced as costs of funds, or interest rate expense, is generally below lease costs associated with a market rate lease agreement giving further support for the school acquiring the property.

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.*

Even though the board plans to be ready on time, if there is a problem opening the facility, the board plans on identifying two backup building that will have low up-fit costs to occupy. The Bastiat Classical School has no plans to build in the first year.

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 2015-16

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

*Refer to the
Resource Manual
Finance Section
for guidance on
estimated funding
amounts*

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

- In year 1 – Base state allotments are determined by the LEA in which the student resides
- In year 2 and beyond- Base State allotments are determined by the LEA in which the school is located.

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

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

REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS

LEA #1600 - Charlotte-Mecklenburg Schools

Revenue	2013-2014 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2015-2016
State Funds	\$4,582.77	408	\$1,869,770.16
Local Funds	\$2,381.40	408	\$971,611.20
Federal EC Funds	\$3,743.48	41	\$153,482.68
Totals			\$2,994,864.04

Total Budget: Revenue Projections 2015-16 through 2019-2020

INCOME: REVENUE PROJECTIONS	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
-State ADM Funds	\$1,869,770	\$2,211,938	\$2,554,788	\$2,669,753	\$2,784,552
-Local Per Pupil Funds	\$971,611	\$1,149,416	\$1,327,575	\$1,387,316	\$1,446,971
-Exceptional Children Federal Funds	\$153,483	\$181,570	\$209,713	\$219,150	\$228,573
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$2,994,864	\$3,542,924	\$4,092,076	\$4,276,219	\$4,460,096

***If the applicant is depending on other funding sources or working capital to balance the operating budget, please provide documentation such as signed statements from donors, foundations, bank documents, etc., on the commitment of these funds. If these figures are loans, the repayment needs to be explained in the narrative and found within the budget projections.**

Assurances are needed to confirm the commitment of these additional sources of revenue. Please include these as Appendix R.

Personnel Budget: Expenditure Projections 2015-16 through 2019-2020

The personnel list below may be amended to meet the staffing of individual charter schools: This list should align with the projected staff located in the Operations Plan (Appendix M).

BUDGET EXPENDITURE PROJECTIONS Personnel	2015-2016			2016-2017			2017-2018			2018-2019			2019-2020		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary
Administrative & Support Personnel:															
Lead Administrator	1	\$75,000	\$75,000	1	\$75,000	\$75,000	1	\$78,000	\$78,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000
Custodians	1	\$24,000	\$24,000	1	\$24,000	\$24,000	1	\$25,000	\$25,000	1	\$25,000	\$25,000	1	\$25,000	\$25,000
Financial Secretary	1	\$26,000	\$26,000	1	\$26,000	\$26,000	1	\$27,000	\$27,000	1	\$27,000	\$27,000	1	\$27,000	\$27,000
Administrative Assistant	1	\$26,000	\$26,000	1.5	\$26,000	\$39,000	2	\$27,000	\$54,000	2	\$27,000	\$54,000	2	\$27,000	\$54,000
A - Total Admin and Support:	4	\$151,000	\$151,000	4.5	\$151,000	\$164,000	5	\$157,000	\$184,000	5	\$159,000	\$186,000	5	\$159,000	\$186,000
Instructional Personnel:															
Core Content Teacher(s)	18	\$42,000	\$756,000	21	\$42,000	\$882,000	24	\$43,000	\$1,032,000	25	\$43,000	\$1,075,000	26	\$44,000	\$1,144,000
Electives/Specialty Teacher(s)	5	\$20,000	\$100,000	7	\$20,000	\$140,000	9	\$21,000	\$189,000	9	\$21,000	\$189,000	9	\$21,000	\$189,000
Exceptional Children Teacher(s)	2	\$43,000	\$86,000	1.5	\$43,000	\$64,500	2	\$44,000	\$88,000	2	\$44,000	\$88,000	2	\$44,000	\$88,000
Teacher Assistants	3	\$15,000	\$45,000	4	\$15,000	\$60,000	5	\$16,000	\$80,000	5	\$16,000	\$80,000	5	\$16,000	\$80,000
Electives (5) And Teacher Assts. (3) Are Part Time	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
B - Total Instructional Personnel:	28	\$120,000	\$987,000	33.5	\$120,000	\$1,146,500	40	\$124,000	\$1,389,000	41	\$124,000	\$1,432,000	42	\$125,000	\$1,501,000
A+B = C - Total Admin, Support and Instructional Personnel:	32	\$271,000	\$1,138,000	38	\$271,000	\$1,310,500	45	\$281,000	\$1,573,000	46	\$283,000	\$1,618,000	47	\$284,000	\$1,687,000
Administrative & Support Benefits															
Health Insurance	4	\$4,500	\$18,000	4.5	\$4,500	\$20,250	5	\$4,500	\$22,500	5	\$4,500	\$22,500	5	\$4,500	\$22,500

Bastiat Classical School

Retirement Plan--Other	4	\$2,500	\$10,000	4.5	\$2,500	\$11,250	5	\$2,500	\$12,500	5	\$2,500	\$12,500	5	\$2,500	\$12,500
Life Insurance & Disability	4	\$850	\$3,400	4.5	\$850	\$3,825	5	\$850	\$4,250	5	\$850	\$4,250	5	\$850	\$4,250
Medicare & Social Security	4	\$2,888	\$11,552	4.5	\$2,888	\$12,996	5	\$2,888	\$14,440	5	\$2,888	\$14,440	5	\$2,888	\$14,440
D - Total Admin and Support Benefits:	16	\$10,738	\$42,952	18	\$10,738	\$48,321	20	\$10,738	\$53,690	20	\$10,738	\$53,690	20	\$10,738	\$53,690
Instructional Personnel Benefits:															
Health Insurance	28	\$4,500	\$126,000	33.5	\$4,500	\$150,750	40	\$4,500	\$180,000	41	\$4,500	\$184,500	42	\$4,500	\$189,000
Retirement Plan--Other	28	\$2,500	\$70,000	33.5	\$2,500	\$83,750	40	\$2,500	\$100,000	41	\$2,500	\$102,500	42	\$2,500	\$105,000
Life & Disability	28	\$850	\$23,800	33.5	\$850	\$28,475	40	\$850	\$34,000	41	\$850	\$34,850	42	\$850	\$35,700
Medicare & Social Security	28	\$2,675	\$74,900	33.5	\$2,675	\$89,613	40	\$2,675	\$107,000	41	\$2,675	\$109,675	42	\$2,675	\$112,350
Includes Part Time Electives Teachers & Assistants	0	\$0	\$0	33.5	\$0	\$0	40	\$0	\$0	41	\$0	\$0	42	\$0	\$0
E - Total Instructional Personnel Benefits:	112	\$10,525	\$294,700	167.5	\$10,525	\$352,588	200	\$10,525	\$421,000	205	\$10,525	\$431,525	210	\$10,525	\$442,050
D+E = F - Total Personnel Benefits	128	\$21,263	\$337,652	185.5	\$21,263	\$400,909	220	\$21,263	\$474,690	225	\$21,263	\$485,215	230	\$21,263	\$495,740
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	20	\$1,200,488	\$193,952	22.5	\$1,109,138	\$212,321	25	\$1,197,738	\$237,690	25	\$1,237,238	\$239,690	25	\$1,283,738	\$239,690
B+E = H - Total Instructional Personnel (Salary & Benefits)	140	\$533,525	\$1,281,700	201	\$588,525	\$1,499,088	240	\$654,525	\$1,810,000	246	\$599,525	\$1,863,525	252	\$624,525	\$1,943,050
G+H = J - TOTAL PERSONNEL	160	\$1,734,013	\$1,475,652	223.5	\$1,697,663	\$1,711,409	265	\$1,852,263	\$2,047,690	271	\$1,836,763	\$2,103,215	277	\$1,908,263	\$2,182,740

Operations Budget: Expenditure Projections 2015-16 through 2019-2020

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
	Administrative & Support:					
Other	Audit	\$10,500	\$11,000	\$12,000	\$12,500	\$12,500
	Insurance	\$14,550	\$17,400	\$20,000	\$21,000	\$22,000
	Travel	\$4,000	\$5,000	\$6,000	\$6,000	\$6,000
	Office Supplies	\$22,000	\$26,000	\$32,000	\$35,000	\$37,000
	Office Equipment & Lease	\$28,000	\$35,000	\$40,000	\$43,000	\$46,000
	Legal	\$7,500	\$6,000	\$7,000	\$8,000	\$8,500
	I S I S, Student Reporting & Admin Services	\$53,000	\$60,000	\$69,000	\$72,000	\$75,000
	Marketing	\$5,000	\$4,000	\$4,000	\$5,000	\$5,000
	Communications, Website, Software	\$86,000	\$101,000	\$116,000	\$118,000	\$121,000
	Facility Rent	\$420,000	\$441,000	\$463,000	\$486,000	\$510,000
	Facility Repair & Maintenance	\$30,000	\$35,000	\$40,000	\$45,000	\$50,000
	Facility Utilities	\$52,000	\$56,000	\$60,000	\$63,000	\$66,000
	Transportation & Meals Assistance	\$58,200	\$70,000	\$81,000	\$83,000	\$85,000
	Furniture & Fixtures	\$48,000	\$30,000	\$30,000	\$20,000	\$20,000
	Contingency Allowance - Under Enrollment	\$150,000	\$0	\$0	\$0	\$0
	Contingency Expenses	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000
	K - TOTAL Administrative & Support Operations	\$1,038,750	\$947,400	\$1,030,000	\$1,067,500	\$1,114,000
	Instructional:					
Other	Curriculum	\$165,000	\$165,000	\$165,000	\$90,000	\$95,000
	Staff Development	\$24,000	\$30,000	\$36,000	\$40,000	\$42,000
	Books & Materials	\$50,000	\$60,000	\$72,000	\$75,000	\$78,000
	Classroom Technology, Software	\$75,000	\$93,000	\$112,000	\$118,000	\$123,000
	Testing & Fees	\$14,000	\$17,000	\$22,000	\$24,000	\$26,000
	Contracted Services - Other Instruction	\$12,000	\$15,000	\$19,000	\$20,000	\$23,000
	Contracted Services - E C Instruction	\$63,000	\$78,000	\$94,000	\$98,000	\$102,000
	L - TOTAL Instructional Operations	\$403,000	\$458,000	\$520,000	\$465,000	\$489,000
	K+L = M - TOTAL OPERATIONS	\$1,441,750	\$1,405,400	\$1,550,000	\$1,532,500	\$1,603,000

Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
J - TOTAL PERSONNEL	\$1,475,652	\$1,711,409	\$2,047,690	\$2,103,215	\$2,182,740
M - TOTAL OPERATIONS	\$1,441,750	\$1,405,400	\$1,550,000	\$1,532,500	\$1,603,000
J+ M =N TOTAL EXPENDITURES	\$2,917,402	\$3,116,809	\$3,597,690	\$3,635,715	\$3,785,740
Z - TOTAL REVENUE	\$2,994,864	\$3,542,924	\$4,092,076	\$4,276,219	\$4,460,096
Z - N = SURPLUS / (DEFICIT)	\$77,462	\$426,116	\$494,386	\$640,504	\$674,356

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

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

1. *How was the student enrollment number projected?*

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

Provide the break-even point of student enrollment.

The student enrollment was projected by numerous facts. In the area that the Bastiat Classical School wants to locate, there are no other charter schools within miles. The closest charter school is Community Charter in the Cherry neighborhood. Nearly 200 individuals from the south and east parts of Charlotte responded to a community survey asking if they support a charter school opening in that area. 88% of the respondents said yes. Also, 82% of respondents stated that they would consider Bastiat Classical School as an option for their child. These numbers along with growing wait lists at area magnet schools, suggests that the a 408 student charter school would fill all of its available seats. Judith Malveaux, a board member, is a communications veteran from Charlotte-Mecklenburg Schools who will help the school fill its seats using her skills including social media.

Breakeven point

The breakeven point in number of students was calculated by dividing non-variable costs (fixed costs) by margin, or revenue less variable costs per student. That number was 301 students to breakeven assuming a commitment had been made for a facility and all other fixed costs were obligated.

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

Despite our positive prospects of there being a large demand for our 408 seats to be prudent we should have a solid financial plan to open the school successfully and sustain that. Here is a list of measures we would take:

1. We have a reserve in the budget, collectively of \$200,000 because we included a contingency that we might be under enrolled and/or we may have under budgeted. With a projected year one surplus of \$77,000 we have a cushion of \$277,000.
2. We would alter the number of classes and hiring of teachers and the financial secretary.
3. A substantial part of our budget (6% of revenue) is the cost of the Core Knowledge curriculum and training. We have flexibility with the vendor in level we purchase.
4. We have used 6% of revenue(\$150,000) for several expense categories

involving technology, communications, and infrastructure. Our vendor has said much of this can be leased versus purchased and also scaled back in terms of the technology we choose.

5. Renegotiate rent.

Does the budget rely on sources of funds other than state, county, and federal (e.g. loans, donations etc.)? If so, please provide the source and amount. Be sure that the appropriate assurances documentation is provided in the appendices

No, it does not rely on other sources of revenue. However, we will, upon learning of our application approval, immediately seek the services of Talbot Consulting of New York, NY who has agreed to help us plan a grant writing and fundraising campaign. The latter will target the business community of Charlotte. We also have an agreement with Joyner Consulting to provide early services designing and installing our communications and technology infrastructure. We have others who will at no cost, or with steep discounts, help in other ways, like staffing consulting by Source2, a Florida firm with extensive public school staffing expertise. We acknowledge however, that these resources are not guaranteed.

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

22 to 1

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

No contracts for services exist, but we do have relationships with vendors whom we anticipate using after other prudent evaluation of alternatives.

The Integrated Solutions Information Systems (ISIS) will be outsourced. We have one quote from the NC Public Charter Schools Association for \$28,000. We will, upon getting an approved charter, seek another quote for the ISIS. Our conservative budget includes another \$25,000 for services we may need such as PowerSchool.

Futures Education has agreed to assist with special needs students and will provide oversight of our EC program. The Futures Education service will include speech and language pathologists, and psychologists, occupational therapists, and physical therapists.

We plan to contract with Core Knowledge and use that curriculum and training.

Our board will set contract authorization levels, and recognize the need for conflict of interest avoidance, for itself and for the Lead Administrator. So all commitments exceeding predetermined amounts will require approval at different levels with the appropriate assignment of contract accountability placed also, to ensure the school receives the services and products contracted for and at the correct price.

Contracts for the above services have not been signed but have been negotiated only for budgeting and planning purposes.

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

The budget not only aligns with the school's mission, but with curricular offerings, the transportation plan, meals plan, and facility needs. The school's mission focuses on high academic expectations which is reflected in the budget through "Curriculum" under the operations budget. The school plans to use Core Knowledge, Saxon Math, and Shurley English. These challenging curricula are included in the budget and are estimated to cost \$165,000 in year one.

The school's mission also states that there will be an emphasis on literacy and critical thinking. This is reflected in the budget under "Curriculum" where the school will provide a Spanish special class for every grade. The school's commitment to critical thinking is reflected in its debate teams. These teams will travel from time to time throughout the year to competitions. This cost is reflected in the "Travel" portion of the budget.

The Bastiat Classical School has a desire to attract students of all socio-economic backgrounds. The school has set aside \$15,000 in transportation costs in year one to make sure that transportation does not become a barrier for students and parents. This cost is also reflected in the Transportation section of the application. The school plans to set aside \$43,200 in year one to provide students on free or reduced lunch balanced meals. As stated in the Appendix T (budget addendum), the school anticipates that nearly 20% qualify for free or reduced lunch. The school estimates that each balanced meal will cost the school at maximum, \$3.00 per student. This helped us calculate the annual cost of the meals.

The school has been in touch with Josh Gregory of Colliers International to calculate numbers for facilities rent. In the area the school wishes to be, the average rent cost runs \$11-\$15 per square foot. Assuming that each student requires approximately 70 square feet (as recommended), the rent will be approximately \$420,000 in the first year of the schools operation. In the facilities plan, the school plans to continue working with Josh Gregory to find the best facility at the best price.

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

The general fund balance should equal a month's operating expenses by the fifth year. That month total will be \$315,000. The accumulated surplus or general fund balance, after five years is over \$2 million.

So, rather than a percentage goal, the goal will be to accumulate that "Surplus", shown in the "Overall Budget" on the application page preceding this narrative. That surplus is predictably more in years 2-5 than in year one. It is pointed out that year one shows higher expenses than year two, despite 18% student enrollment growth, but that is largely due to a \$50,000

contingency allowance for under budgeting in the inaugural year.

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

At present we will try to purchase versus lease those needed resources. The facilities will be leased with consideration of purchasing between years 5 and 10. Some items such as office printers/copiers, etc. may be leased. We do, however, have the option of deferred payments or leases of various items in the budget but only if our enrollment targets are not met.

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

There is no substantial number or amount of tangible resources at this time. We will solicit donations of goods and services upon receipt of acceptance of our application in addition to an aggressive Charlotte business fundraising campaign and grant request project as mentioned earlier.

Financial Compliance: (No more than a half of a page)

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

Basics of good internal control are the foundation for the reliability of the financial statements and are needed to safeguard the resources of the school. Not only is Bastiat Classical School at risk of losing valuable resources with poor controls but there is more at risk. That is the potential for negative publicity associated with any event that might attract notoriety including financial theft or even financial mismanagement. This also often brings a stigma to other charter schools, or indeed to the whole North Carolina charter program and its attendant regulation.

We will contract with a CPA firm (see below) to provide the annual audit but in addition we will request from them a report on our internal controls. This will include an evaluation of our controls before we open our school so that any weaknesses are discovered and corrected before the school year begins.

We will contract for the DPI required services of the Integrated Solutions Information System with a provider after receiving more quotes. We have discussed the services with the NC Public Charter Schools Association, who will provide same and thus create another level of cash segregation by its external accounting for our pupil funds, accounts payable, and payroll. Internally, we will keep a petty cash fund for emergencies and use a system requiring a paid receipt and/or authorization for expenditures. Approval of expenditures over a recommended amount will require the signature of the Lead Administrator.

Accounting records will be safeguarded by use of daily locked files and to the extent practical secure online records with appropriate password protections. Sensitive records will be systematically shredded as necessary. The board treasurer will provide a financial statement to include a statement of fund balances (balance sheet) and a statement of receipts and expenditures (a P&L) at each regularly held board meeting and an explanation to board members for questions. Additionally, periodically the ISIS provider and or the auditors will be asked to attend board meetings.

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

We know of none. We will, however, require employees, board members, and others who conduct business transactions with our school to divulge any actual or even perceived conflicts of interest. We will extend our policy to request disclosure of conflicts of interest that may involve interests beyond pecuniary interests, such as influence and control.

Provide the name and contact information of the independent audit firm who will conduct the annual financial statement audit. If a firm has yet to be identified please list the firms the board has investigated.

We will solicit audit bids from more than one CPA firm, qualified by the Local Government Commission. We have discussed the audit and fees with two firms who agreed that it would be in our interest to negotiate fees closer to our school opening. Those firms giving us tentative estimates of \$10,500

are:
Rives & Associates, LLP, 212 West Center St., Lexington, NC , 336-248-8281
336-248-2335
Potter & Company, CPAs, 434 Copperfield Blvd. NE, Concord, NC 28025, 704-
786-8189 704-786-4447

VI. AGREEMENT PAGE

Application Fee:

Pursuant to § 115C-238.29B(e) the charter school applicant must submit a \$500 application fee to the Office of Charter Schools. The applicant must submit their application fee by the December 6, 2013 5:00 pm EST deadline. Payments will be accepted in the form of a check only. Cash or credit cards are not accepted.

**Application Note: The applicant must mail the check along with a copy of the proposed charter LOI to be received before or on the due date of December 6, 2013 5:00 pm EST. Failure to submit payment by the stipulated timeline to the Office of Charter Schools will deem the application incomplete.*

Payments should be made payable to North Carolina Department of Public Instruction

*North Carolina Department of Public Instruction
Office Of Charter Schools
6303 Mail Service Center
Raleigh, NC 27699-6303*

I understand the requirements pursuant to G.S. 115C-238.29B(e).

bastiatschool

Date: 12/06/2013

Applicant Signature:

The foregoing application is submitted on behalf of Bastiat Classical School (*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: bastiatschool

Board Position: Weston Burroughs

Signature: _____

Date: 12/06/2013

Sworn to and subscribed before me this
_____ day of _____, 20____.

Notary Public

Official Seal

My commission expires: _____, 20____.

