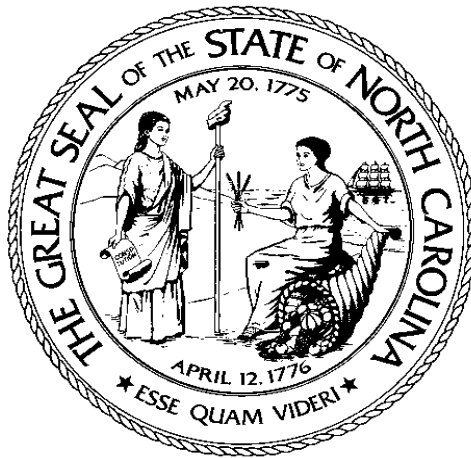


Clemmons STEM Academy - CSA will provide a safe and nurturing learning environment for student development and growth. The Schools students will be prepared to be responsible, caring and productive members of an ever changing, global society.



Application Preliminary Evaluation Packet

For each section, please rate the response then explain your rating by specifying strengths and weaknesses in the space provided. Where applicable, you should elaborate on concerns by specifying additional information you would request or follow-up questions that you have.

- § Pass: The response demonstrates an understanding of key issues and the ability to start a charter school successfully although minimal clarification may be needed in places. It addresses the topic with clear, specific and accurate information that reflects thorough preparation. The application meets minimum components as evidenced by the check boxes of the rubric.
- § Fail: The response either fails to entirely address the selection criteria or addresses some of the criteria. The responses lack adequate detail and/or raise substantial concerns about the applicant's preparation for and ability to start or operate a charter school successfully. The application fails to address all of the minimum components as evidenced by the check boxes of the rubric.

Subcommittee Members:

Steven Walker
Cheryl Turner
Amy Ruck Kagan
Alex Quigley
Alan Hawkes
Shannon Stein
Jessica Kelly
Kebbler Williams
Lynn Kroeger
Robert McOuat
Shannon Sellers
Deanna Townsend-Smith

Date of Review:

09/27/2017

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NORTH CAROLINA CHARTER SCHOOL APPLICATION

Clemmons STEM Academy

Public charter schools opening the fall of 2018

Due by 5:00 pm, September 19, 2016

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

2016 Application Process

To open a charter school in the 2018-2019 school year

APPLICATION DUE DATE/TIME

September 19, 2016 A complete *online* application package, in the Office of Charter Schools **by 5:00 pm EST.**

Non-Refundable \$1000 Application fee due to the Office of Charter Schools

Application Fee Payment Details can be found on the Office of Charter Schools Website

APPLICATION SPECIFICATIONS

Applicants can submit applications prior to the deadline September 19, 2016 at 5:00 pm EST. **All applications 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 in the appropriate places within the application.
2. **Any** answer given within the application which is not original to the applicant, the applicant must provide a citation to the source of the answer.
3. Review all elements of your application for completeness before submitting.
4. **Any** document attached to the application or within the online system **must be** in PDF format.
5. Late submissions **will not** be accepted. No exceptions.

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Total Subcommittee Votes 85

CSAB Votes 85

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I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Clemmons STEM Academy

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

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

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

Name of contact person: *Linda L. Petrou*

Title/Relationship to nonprofit: *Chairperson*

Mailing address: 1324 Berwick Road
Winston-Salem NC 27103

Primary telephone: 336-287-6405 Alternative telephone: 336-287-6405

E-Mail address: lindapetrou@gmail.com

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

County: FORSYTH

LEA: 340-Winston Salem/Forsyth County Schools

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

No:

Yes:

If so, provide the name of the third party person or group. Alliance Education Services, INC.

List the fee provided to the third party person or group. 0

Provide a **full** detailed response of the assistance provided by the third party person or group while preparing this application and when the assistance will end.

Portions of this application were taken from and modeled after the successful application of Mallard Creek STEM Academy with the express permission granted by that board to Clemmons STEM Academy, Inc. There is language and terminology that Alliance Education Services, INC. a non-profit

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charter support and consulting firm, assisted with and which may appear in other charter school applications. Upon successful approval of this application, any involvement by Alliance Education Services will conclude and the board at its sole discretion may elect to utilize Alliance Education Services or any other charter school consultant/firm to assist with the opening and successful operation of the school.

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

No:

Yes:

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

No:

Yes:

Acceleration

Yes:

No:

To be considered for acceleration applicants must meet four specific criteria. Provide supporting evidences of the following:

**Demonstrate a clear and compelling need for the accelerated planning year*

Partner with a two of four year institution of higher education in North Carolina

*Attach Appendix A from the four year institution of higher education in NC to demonstrate a partnership
Verify the absence of a charter school in the proposed county of location*

Yes:

No:

Agree to participate in the planning year while the charter application is being reviewed without any guarantee of charter award.

Yes:

No:

What is the name of the nonprofit organization that governs this charter school? Clemmons STEM Academy, Inc.

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

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2019

Month August

Will this school operate on a year round schedule?

No:

Yes:

Proposed Grade Levels Served and Total Student Enrollment (

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5

Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
Year 1	K,01,02,03,04,05,06	554
Year 2	K,01,02,03,04,05,06,07	665
Year 3	K,01,02,03,04,05,06,07,08	798
Year 4	K,01,02,03,04,05,06,07,08	798
Year 5	K,01,02,03,04,05,06,07,08	798

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, that the initial board members and I were regularly involved in the development of this application, and that no part of this application is plagiarized. 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.

clemmonsforsyth
Signature

Board Chairperson
Title

clemmonsforsyth
Printed Name

09/22/2017
Date

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Section I: Application Contact Information Concerns and Additional Questions	<u>Reviewer</u>	<u>Page Reference</u>
<u>Will Alliance Education Services ever be paid a fee for their assistance in writing the application? If so, what is the agreed upon arrangement?</u>	<u>Amy Ruck Kagan</u>	<u>Cover Page</u>
<u>Starting off K-6 may be difficult.</u>	<u>Steven Walker</u>	<u>Grade Levels</u>

<u>Reviewer</u>	<u>Score</u>
<u>Steven Walker</u>	<u>Pass</u>
<u>Cheryl Turner</u>	<u>Pass</u>
<u>Amy Ruck Kagan</u>	<u>Pass</u>
<u>Alex Quigley</u>	
<u>Alan Hawkes</u>	
<u>Shannon Stein</u>	<u>Pass</u>
<u>Jessica Kelly</u>	<u>Pass</u>
<u>Kebbler Williams</u>	<u>Pass</u>
<u>Lynn Kroeger</u>	
<u>Robert McQuat</u>	
<u>Shannon Sellers</u>	<u>Pass</u>
<u>Deanna Townsend-Smith</u>	

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II. MISSION and PURPOSES

(No more than three total pages in this section)

Mission:

*State the Mission of the proposed charter school in **thirty-five 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:

CSA will provide a safe and nurturing learning environment for student development and growth. The Schools students will be prepared to be responsible, caring and productive members of an ever changing, global society.

Clearly describe the mission of the proposed charter school:

The STEM initiative will drive student engagement and creativity that will result in increased academic achievement. The School plans to combine rigorous high-quality STEM integration programs with a standards-based curriculum, creating an educational setting that transforms student potential into academic achievement, through increased engagement and experiential learning.

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.*

Forsyth County is currently the 4th largest system in North Carolina serving over 38,500 students in K-8th grade. For the 2015-16 school year, 40.2 percent of the students are white, 28.5 percent are African-American, 24.5 percent are Hispanic, 4.0 percent are multiracial, 2.5 percent are Asian, and less than 1 percent are American Indian or Native Hawaiians/Pacific. Our School expects for the student enrollment to mirror that of the County. Although we will not have a weighted application nor enrollment criteria beyond those that are standard in NC, intend to actively draw a diverse student body. This School is designed to replicate a "magnet model" to provide a diverse community of learners with equal access to academic rigor, technology, scaffolding and supports, and competitions; academic and athletic. The Schools character program modeled after The Leader in Me will create a climate and culture committed to leadership and service to others. We believe this unique model that strives for academic excellence and student leaders will serve this community well and provide our families with the opportunity to experience a 10-year continuum of STEM engagement. The Schools commitment is to provide the highest quality education for our diverse population of students while closing the achievement gap. The School will be unique to the area, providing a viable choice to families looking for a rigorous K-8th grade STEM program. In addition to the STEM initiative

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through Project Lead the Way, other unique aspects of the school will include the Design Thinking Process, applied technologies, cross-curricular projects, extracurricular STEM enrichment opportunities, and competitive middle school sports program. Our school intends to serve all students equally, and will provide the same supports including NSLP, bus transportation, early and aftercare, extended learning program and a full school implementation of NC MTSS to ensure success for all students to mitigate any barriers to entry. As you will see in the appendices, the Clemmons area serves a cross section of this County. Half of the schools within a 5 mile radius are higher performing schools and others within a 7 mile radius are much lower performing schools. The intent of this school and the model of instruction and leadership is designed to provide a racially balanced, academically successful program that is deeply ingrained in leadership, service and rigor. We believe that a STEM program with a strong support network for identifying and scaffolding at risk students will increase the academic performance of all students and will become a flagship charter school that successfully bridges achievement gaps within its own student population. Achievement goals will be based on student Growth, College and Career Readiness and decreasing Achievement Gaps as the primary indicators for success. The Leader in Me program is chosen to develop a climate that cultivates service to one another, leadership opportunities for all students and a spirit of community. The elementary and middle schools within 8 miles are larger membership schools and we believe that a K-8th grade school with a target capacity in 5 years of 792 provides students a comprehensive school program with extracurriculars and sports without becoming so large that a child becomes lost in the crowd. A K-8 magnet model with an embedded Leader in Me also provides families a feeling of partnership in their child's education.

- 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 in grades 9-12).*

The projected total enrollment for this school is 792 which is approximately 2% of the current K8 population.

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

The Schools commitment is to provide the highest quality education for our diverse population of students while closing the achievement gaps. An integration of a STEM centered initiative, with research based practices, is emphasized throughout the program to ensure student achievement of the NC Standards as well as the Next Generation Science Standards. The mastery of these grade level expectations will be evident in student performance on our end of year exams. Student mastery of our expectations will also be evidenced by student performance on completed projects, builds, competitions, and community partnered activities. By offering a full implementation of Project Lead the Way each year, and a full implementation of Leader in Me, CSA provides another opportunity for students to grow and learn with technology and other STEM applications within a true "leadership model" school. These students will have an even greater potential to build their STEM capacity, and academic achievement, by the School providing a K -

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8th grade STEM pipeline and a commitment to service learning and community awareness. Other supplemental programming taught through electives and in core courses include robotics and engineering, design and modeling. CSA will build true leaders of tomorrow. The School sets high academic and social expectations that together lead to the successful development of the whole child and creates lifelong learners prepared to contribute in an ever-changing society. In doing so, the School recognizes that each student is capable of learning and achieving academic success and therefore is committed to developing student intellectual potential while reinforcing personal character, and sparking a lifelong learner. This is in perfect concert with the Schools mission, and highlights our commitment to fulfilling it. The Schools educational philosophy is grounded on the expectation of increasing learning opportunities and raising the academic achievement of its students through high expectations and character development.

We will partner with parents to support the STEM initiative, develop student character, and strengthen our community partnerships by educating and encouraging them to participate in school based academic events and community service. It creates a student centered model, that naturally differentiates learning, and demands engagement. Students are challenged to learn and apply the breadth and depth of content and skill sets across the disciplines through reality-based projects, using up-to-date research from the fields. Students are asked to perpetually evaluate their points of interest, experiences and talents with ongoing portfolio development. The benefits of a well-articulated STEM program include: engagement; application of knowledge; collaboration and communication; problem-solving skills; embedded differentiation; increased learning relevance, allows for more meaningful projects, will help to foster community partnerships, and promotes a student centered learning environment.

Providing a rich and rigorous STEM K-8th grade program will provide our students every opportunity to be successful in the globally competitive world they are entering. The purposeful inclusion of NSLP, Bus transportation, after school tutoring and enrichments will provide equity in access to all students wanting to experience this educational model. The Schools Educational and Social Model is designed to prepare our students to be responsible, caring, and productive members of an ever changing, competitive global society.

4. *In the appendices (Appendix A1), 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.*

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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.*

As a STEM based school, students will certainly have expanded choices in their educational opportunity. But in order for this model to work, we must also focus on the staff. Our teachers will have a unique opportunity to apply innovative instructional strategies, curriculum and teaching methods. All staff will be provided with intensive professional development to help them implement focused projects and activities tied to the standards in science, technology, engineering and mathematics. STEM teachers will also have the opportunity to include School partner experts in their PLC groups to deepen lesson planning, instructional practices and reflection as well as foster the flow of information between the multiple parties. Expert teachers in STEM disciplines, Technology and Engineering in particular, will assist classroom teachers to implement the supplemental curricular pieces to ensure the fidelity of the program. The School will generate an opportunity for teachers to participate in an exciting and innovative venture; one that allows them to take ownership over the learning process, and flex their individual autonomy while incorporating their unique teaching styles into the classroom. Teachers at the School will feel encouraged to take part in the advancement of their students educational lives, openly communicate with their colleagues, and share effective techniques in an effort to promote the spread of best practices and cutting-edge methods. In order to best utilize research-based strategies and implement the school programs, all teaching staff will receive ongoing professional development on the various components of the programs, respectively, to ensure effective implementation. All teachers will use a blended model of delivery that includes a component of direct and explicit instruction with time for shared and group practice through hands on activities and projects. Units will culminate with project completions with both formative and summative individual assessments being employed to measure students level of mastery regarding the targeted content knowledge and skills.

Teachers will be provided with initial and ongoing feedback regarding the curriculum, the delivery model, the STEM initiative, and the Leader in Me program. PLTW requires intensive training and certification that enables teachers to then teach a module. Each year we will develop more staff and open more modules to students. This style of planning and training also builds teacher capacity that strengthens instruction and increases achievement while building a network of teacher experts. The intensive training in Leader in Me will help this school develop a strong sense of community and a culture committed to "do the right thing" at all times. By allowing teachers the opportunity to have some choice regarding their professional development offerings a positive school culture is created, where teachers feel respected and have a sense of ownership pride. Educators will be prepared to deliver instruction founded on research and best practices to all learners; including students receiving or eligible for EC,

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AIG, 504, speech and language, and/or ELL services, etc. which will increase student achievement for ALL learners. A teaching staff that has highly developed instructional practices will ultimately serve all students in our School.

6. In order to prepare for the field, students will need specific 21st century STEM skills and be fluent in the use of varying technologies. Using engineering design principles to complete hands-on, problem-based projects also deepens the students understanding of processes and emphasizes many of what we now call 21st Century Skills (e.g., collaboration, critical thinking, and interpersonal communication) (Meyrick, 2011). The Schools Educational Plan includes development of these skills through STEM initiatives which integrate instructional practices throughout the content areas and electives. Teaching science and engineering in the integrated format also allows for other content areas to find natural places to integrate. Math teachers should plan and communicate with other teachers and with students to correctly time instruction for specific mathematics skills prior to needing specific skills for use in engineering or science instruction. Integrating social studies curriculum provides students opportunities to examine economic, political, and social issues that can directly or indirectly impact design decisions. Reading, writing, and speaking are important aspects of communication and should also play an integral role in curriculum alignment.

Aligning the curriculum in this way helps students make purposeful and useful connections for math skills while they are building and practicing those skills in authentic learning environments, providing the learner with a clear lens to view the entire picture. (Meyrick, 2011).

Both private and public sectors report that 21st-century workers require skills that many of todays graduates dont have. Students need more in-depth knowledge of math and science, plus the ability to integrate and apply that knowledge to solve the challenges facing our nation.

Children who study STEM also develop a variety of skills that are essential for success: critical thinking and problem solving, creativity and innovation, communication, collaboration, and entrepreneurship, to name a few. A number of K-12 programs currently leverage STEM pedagogies. However, a 2014 study published by the American Society for Engineering Education identified several characteristics of quality STEM programs:

1. The context is motivating, engaging, and real-world.
2. Students integrate and apply meaningful and important mathematics and science content.
3. Teaching methods are inquiry-based and student-centered.
4. Students engage in solving engineering challenges using an engineering design process.
5. Teamwork and communications are a major focus. Throughout the program, students have the freedom to think critically, creatively, and innovatively, as well as opportunities to fail and try again in safe environments.

The Schools Educational Plan is aligned with the above referenced research for the purposes of successfully enacting the Schools Mission and Vision.

Goals for the Proposed Charter School:

1. *Provide specific and measurable **goals** for the proposed school for the first 5 years of operation*

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outlining expectations for the proposed school's operations, academics, finance, and governance. Address how often, who, and when the information will be communicated to the governing board and other stakeholders.

Operations, Finance, Governance:

The Board has established a variety of goals in order to measure the success of the overarching program. The Board will meet monthly and the onsite school Principal will present the appropriate reports to the Board. Additional personnel (contracted services) may also present reports, from LINQ, Powerschool, EVAAS and other assessment reports will be shared with the Governing Board as they become available at each meeting.

There will be 5 components used to measure financial and operational goals:

1. Student enrollment verification as reported through Powerschool (monthly/ongoing) Goal: 95% target enrollment
2. Budget V. Actual Expense Reports as prepared by contracted financial services (monthly/ongoing) Goal: meet 95% budget expectations
3. Financial Audit as reported by an independent Audit firm to measure financial efficacy, responsibility and stability (yearly/every year) Goal: No Management Comments
4. Completion of formal governance training Goal: 100% Board members will complete .
5. At least 85% of the parents/guardians and staff of our enrolled students will indicate a high level of satisfaction with their child's schooling experience. This will be evidenced by positive feedback on the Stakeholder Satisfaction Survey, which will be administered in the second semester of the school year.
 - a. Student re-enrollment will be at least 90%
 - b. Staff attrition will be less than 15%

Academics:

Measurement of student growth will also be utilized to quantify how well the specific measurable objectives, identified in the charter school application, were met during the first year of operation.

Baseline data will include standardized test scores, report card grades, attendance reports, behavioral records, and IEP /EP and or ELL Plans (as applicable). This data will be compared to current data at the end of each school year. For example, EOG Scores from 2017 will be used as a baseline.

Ongoing Progress Monitoring (Interim Progress Reports and Report Cards, I-Ready, MClass, MTSS data) will be utilized as reflective and guidance tools for cohort and class placement. Specific, Measurable Goals include:

Math and Reading scores will ultimately (in 5 years) grow an average of 10% higher than the combined local average, based on the supplemental curriculum resources we will employ and the dedicated time devoted to math, reading and science throughout our standard day

Reading year 1: will be 5% higher than the composite average

Math year 1: will be 5% higher than the composite average

School will "exceed expectations" in growth and have higher growth index scores than neighboring schools.

All students will make at least 1-years worth of academic gain in each core subject measured based on initial and final benchmarking assessments which will be reported to families

* A minimum of 5% increase in the Schools SPG each year for 5 years (example table included)

Perhaps most importantly, as part of the Schools mission to provide a true

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STEM initiative, student participation and performance (demonstration of growth and mastery) in the STEM components will play a very integral role in assessing the Schools collective performance. Students will be expected to continue to grow in the standardized tests for Math and Science, but they are also expected to show increased gains and superior performance (to their peers in non-STEM programs) in the areas of engineering, technology. We expect our students to successfully participate in school wide, local, regional, state, and potential national levels of competitions. Key elements of the STEM initiative include the following:

* PLTW, Athletics, Science Olympiad, FIRST Robotics/VEX Robotics, Completion of STEM/Engineering Projects

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

Governance effectiveness is a direct correlation to the measurement and achievement of the goals articulated above. It is the Board's responsibility to provide the oversight and support that enables the School to meet all of the goals for Academics, Operations and Finances. If the School has met or exceeded its goals in those categories, the Board will have met its obligation to The School, the LEA and to the State.

The governing board is comprised of local community members and parents with a vested interest in the schools long term viability and success. The Governing Board will hold monthly, open meetings that require the onsite administration will attend and present monthly reports inclusive of enrollment, academics, compliance, fundraising efforts, community relations and other information as available.

The Governing Board review survey data collected each spring as well as academic data to measure The Schools success and to provide feedback that will be used to create a School Improvement Plan aligned to the North Carolina Continuous Improvement Model.

The School has set for itself 3 overarching goals to graduate students who are:

1. academically superior as demonstrated by their academic achievement scores

As evidenced in the School SPG, CCR, Growth Index)

2. prepared for challenging academic programs and careers as demonstrated through their engagement and mastery of STEM projects (As evidenced in competitions, performances, entrance to other criterion based programs)

3. socially engaged as demonstrated by their community awareness and commitment to the Leader In Me.(As evidenced in Service Learning Projects and hours)

At the end of each year, the Governing Board will know that the school is working towards their mission statement by reviewing the student achievement reports and comparing them with other LEA schools. The expectation is that the school's instructional program via a workshop model will help increase student performance and yearly achievement gains. The STEM program implemented by professionally trained teachers will improve students' understanding and mastery of STEM subjects. The Board will also confirm that students are participating in community events and service learning activities

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The Governing Board expects to meet all compliance indicators and measures within the NC Performance Framework.

The Governing Board will work cooperatively with its contracted service providers to ensure academic accountability, fiduciary responsibility and community engagement. The Governing Board will receive and review monthly financial statements and academic progress reports, provided by site based leadership, to ensure that expenditures and academic results are consistent with the goals of the district and the charter. The Governing Board has local control over the budget and approval of expenditures and is responsible to ensure compliance with the charters contractual obligations.

The Governing Board will contract with an independent financial services provider to ensure appropriate segregation of financial duties and reporting. Each year the Governing Board will revenue the audits, and set appropriate budgets that utilize the school's revenue and resources to meet the previously identified goals.

The Governing Board will review yearly climate surveys from Parents and Staff and will review yearly attrition rates, enrollment targets, behavior referrals and staff retention rates (including SAR)

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Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
Mission statement should include STEM in it if that is a main component of the school.	Jessica Kelly	Mission Stat
Why doesn't the mission statement mention anything about STEM? If STEM is the basis of your school, it should appear in the mission. The description does not give clarity to the STEM program at the school.	Shannon Sellers	Mission Stat
***Nothing in the mission statement informs the reader that this is a STEM school.	Kebbler Williams	Mission Stat
The mission statement seems very generic and is not tied to anything that is being offered by the school.	Steven Walker	Mission Stat
What is the rationale for having a charter school in this location? The need for this school is not addressed. How will the educational plan be different from the LEA?	Shannon Sellers	Educational
School need should be clarified. Are other schools in the area not doing STEM?	Jessica Kelly	Educational
Is your target student population 792 or 798? There are discrepancies throughout the application. Have you budgeted for the Leader in Me training and program given the high cost? Can you be more specific about how you would be differentiated from local LEA programming?	Shannon Stein	Educational
***The applicant did not include a rationale for selecting the location. ***The applicant provided information related to the importance of a STEM education, but did not demonstrate an actual or perceived need for this school in this community. ***The applicant provided a summary of its education plan, but did not tell how it will compare or differ from the LEA.	Kebbler Williams	Educational
You mention several different programs, but STEM is the main focus based on the name of your school, how will STEM be fully implemented and what will it look like?	Shannon Sellers	Purposes of
Who will be conducting the extensive training for teachers? Is this worked into the budget?	Jessica Kelly	Purposes of
Are there any other STEM schools in the area, either charter or traditional?	Amy Ruck Kagan	Purposes of
What collaboration time will be provided to teachers since they are supposed to have cross-curricular lessons?	Shannon Stein	Purposes of
What is the vision for what the STEM program will look like?		
***The goals, as written, are not SMART goals.	Kebbler Williams	Goals for th
What are the averages of the LEA?	Steven Walker	Goals for th
What is the "composite average?" Is it realistic that your school will "exceed growth" in the first year?	Shannon Sellers	Goals for th
Please clarify how goals will be measured. Clarify exceeding growth in first year; how is this a realistic goal?	Jessica Kelly	Goals for th
For reading/math goals, how do you define composite average? Is "exceeding growth" reasonable for a new school? Do you offer enough extracurriculars to have all students participate? What about your youngest students? How will the Board be trained?	Shannon Stein	Goals for th

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Reviewer	Score
Steven Walker	Pass
Cheryl Turner	Fail
Amy Ruck Kagan	Pass
Alex Quigley	Pass
Alan Hawkes	
Deanna Townsend-Smith	
Shannon Stein	Pass
Shannon Sellers	Fail
Robert McQuat	
Lynn Kroeger	
Kebbler Williams	Fail
Jessica Kelly	Fail

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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 educational focus of the School is a thoughtful and purposeful STEM program designed to provide our students with a creative and challenging student-centered learning environment. The STEM program will be implemented through a cross curricular delivery method that will encourage and enable students to become globally competitive. This fully integrated STEM program will meet the needs of all learners by engaging students through a hands-on technology infused educational environment that is meaningful and purposeful in its scope and sequence. This will be fostered with the implementation of a relevant and rigorous STEM program, where the "A" is defined in a unique way. The "Arts" in our STEM program will be defined using the Design Thinking Engineering process, which is by its very nature a nonlinear artistic process.

We believe that a STEM program is the best way to accomplish this task, based on current global educational climate. "In the 21st century, scientific and technological innovations have become increasingly important as we face the benefits and challenges of both globalization and a knowledge-based economy. To succeed in this new information-based and highly technological society, students need to develop their capabilities in STEM to levels much beyond what was considered acceptable in the past" (National Science Board, 2007). STEM education helps to bridge the ethnic and gender gaps sometimes found in math and science fields.

The School is committed to providing an environment of academic rigor and relevance that advances high standards of student achievement. At the forefront of this environment will be our administrators and teachers. Our administrators will serve as true instructional leaders and balance the needs of all stakeholders. This will be done through structured PLC groups, prescriptive professional development opportunities, supported project based instruction, purchased STEM resources, and curriculum, etc... The School will also actively pursue teaching candidates with experience or interest in promoting a STEM initiative to promote fidelity to the core academic program and purposefully designed elective offerings. High quality curriculum

materials and the latest technologies will be used towards achievement of this goal. Mastery of the NC Standards through Project-Based Learning through Project Lead the Way and the use of technology infused instruction for a STEM program will be the main focus.

Students will experience a variety of engaging learning formats such as direct instruction/lecture, collaborative groups, problem solving

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activities, technology infused videos and modules, expert guest speakers, instructional field trips, experiential education, and examination of high level and related text selections. Students will be provided with access to technology based instruction, engineering design process thinking, labs, technology, robotics, coding experience, math manipulatives, and a variety of other materials and hands-on learning opportunities. This integrated approach allows students not only to learn, but also more importantly, to apply the required benchmarks into real-world situations. Real-world application increases the relevancy of the learning experience and enhances critical-thinking and decision making.

Finally, The School will implement a focused and thoughtful, data driven (MTSS) program, in order to accelerate and maximize student academic and social-emotional outcomes through the application of data-based problem solving at all levels of the educational system. Through its implementation, the School will identify students at risk, monitor student progress, provide evidence-based interventions and adjust the intensity and nature of those interventions depending on student responsiveness. The Leader in Me program is designed to cultivate strong positive relations in the school community and increase individual and collective achievement.

Curriculum and Instructional Design:

Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure for each grade span (i.e. elementary, middle, high) the school would ultimately serve.

A STEM classroom shifts students away from traditional, content specific, pieces of information and rote procedures towards a more integrated approach that includes investigating and questioning the interrelated facets of the world. An example of how the standard curriculum might be augmented in a STEM classroom is the teacher posing a problem and then requiring students to do original research inspired by a class-wide inquiry project, where they must use technology to gather and analyze information, design and test a model solution, collect data, provide peer feedback to improve upon a proposed solution, self-reflect and then present their conclusions and finished products/projects to a wider audience comprised of peers, staff, parents and community members. Opportunities for student choice and learning extensions would be provided as appropriate.

There are a variety of ways to set up a collaborative STEM classrooms. Elementary grade and middle school students should be engaged in ongoing science projects, design and modeling courses, SIM CITY and labs. Additionally, students will have exposure to the basics of coding skills. These skills should be applied as appropriate in areas such as: computer controlled devices, robotics and automation, building basic apps, hand-held technologies (GPS, digital probes, etc), broad overview of electronics and circuitry and other relevant programming. . (<http://STEMedu.com/about-us/faqs/#faq-15>) Classes and labs will be designed to meet the needs of all students to allow for safe, structured instruction and flexible seating/movement for group activities.

STEM literacy will be used as an interdisciplinary area of study to bridge the core content areas of science, technology, engineering and mathematics. By integrating STEM lessons throughout the curriculum, students will learn and be able to apply an understanding of how the world works within and across these interrelated domains.

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The STEM initiative will provide curricular and extracurricular programs, routinely with a marine science emphasis, that will infuse science, technology, engineering, and mathematics in order to increase student engagement, academic performance, and student innovation.

Students will have the opportunity to gain skills such as, but not limited to, problem solving, collaboration, task commitment, teamwork, environmental stewardship, technology fluency, and entrepreneurial applications. The School will implement vertically aligned curricular programs that scaffold students through a STEM skills continuum through implementation of thematic projects, engaging lessons, content application opportunities, hands-on inquiry, and community partnerships.

Embedded in the framework is a system to establish well-balanced teams among educators and students based on a variety of characteristics. All classes will be taught by certified personnel and will be designed to maximize space for learning with a gathering area, collaborative work tables or pods and teacher stations. All classes will be equipped with technology to provide teachers the opportunity to embed technology into instruction and to implement the Google Education Platform in all content areas. Classrooms will be uniquely designed to serve students in a collaborative, team environment including a "gathering area" for younger students with work tables, and specialized mobile desk units for older students which can be moved around in a fluid manner to allow for individual, partner and group work in a matter of seconds. This design will promote and support a progressive, technology enhanced and project-based model of instructional delivery.

Provide a synopsis of the planned curriculum, including:

1. *One sample curriculum outline (in graph form) in the Appendices (Appendix B) for one core subject (specific to the school's purpose) for each grade span (i.e. elementary, middle, high) the school would ultimately serve.*
2. *If you are proposing a high school, as Appendix B2, provide a visual disseminating what courses (core content and electives) will be offered at the charter high school to ensure students meet the proposed charter school's graduation requirements. Please ensure the projected staff and budget aligns with the course offerings.*
3. *Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model.*

The School will use many curriculum resources that are research based and have demonstrated academic achievement and value in core content areas with unique supplemental resources aligned to NC standards. The school uses textbooks aligned with State and/or national standards to ensure our students will be successful in state mandated assessments in the accountability model. The STEM curriculum is aligned with the NC SCOS for each subject and grade level expectations. It will also be integrated throughout the instructional day in core courses and will be the primary curriculum delivered through our focused electives offerings and after school enrichment programs. These materials include challenge and intervention supplemental materials that will be incorporated to address the needs of special populations of learners, such as Gifted, EC, 504, and ELL students

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We have created a general frame for year one K-6 grade scope and sequence which covers the core content areas and a supplemental plan for STEM electives which includes Legos, Robotics, Coding and project-based modules. The faculty will follow the pacing guides built around grade level standards and write lesson plans accordingly. Teachers will be required to include interventions, accommodations, and ELL and ESE strategies to ensure each student is receiving the support needed to meet the set objectives. The lesson plans will be submitted to school leaders and returned with feedback for ongoing improvement, as needed.

The core curriculum in Reading through Reading Wonders will meet the guidelines for NC Standard Course of Study and include the six components of Reading: phonemic awareness, phonics, fluency, vocabulary, comprehension and oral language. and sequence to ensure a variety of genres are taught K - 8.

O Math! K8 offers an engaging and interactive approach to covering new state standards. Its seamless digital path and Write-in Student Edition

Legos Educational - Legos Education provides a myriad of STEM activities for students in grades K-8 that blend grade level content standards with a technology infused delivery and hands-on projects to teach mathematical, science and engineering topics, concept through execution. The Legos program is a balanced curriculum that also incorporates literacy (Reading and Writing). The adopted program for Elementary students includes: WEDO STEM projects, Story Starter, Build to Express, More to Math and Simple Machines.

Twig (<https://www.twigcarolina.com/>) has a comprehensive set of 3-minute videos, each combining rigorous research with stunning visuals to support inspirational science and math teaching in the classroom for students in grades 5-8. The more than 1,000 videos offer spectacular footage from NASA, CBS, the BBC, and other sources, and all are original and purpose-made. Twig provides teachers with several avenues to differentiate learning. ELLs benefit from having images and vocabulary that connect, and dyslexic students have the benefit of hearing and seeing notes simultaneously. Students who have attention disorders can easily be refocused with the short videos.

PLTW - The School will adopt Project Lead The Way (PLTW) in the middle school grades with potential to expand programs into elementary school over time as necessary. The School administration and selected teachers will work as a team to select electives from PLTW that best fit the needs of the School community. Available tracks of study include engineering, biomedical science, and computer science. In addition to hands-on, project-based curriculum, PLTW programs include high-quality professional development training that provides teachers with the support and resources they need to devote more time to inspiring students. Designated teachers will spend several days at training preparing for the new courses and learning from other PLTW experts.

4. *Describe the primary instructional strategies that the school will expect teachers to master and explain why these strategies will result in increased academic achievement for the targeted student population for each grade span (i.e. elementary, middle, high) the school would ultimately serve.*

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Differentiated and Standards-Based Instruction The Schools ultimate goal is to provide a learning environment that will maximize the potential for student success. Teachers will use differentiated instructional strategies in order to connect and support individual learning needs. Teachers will manage instructional time to meet the standards while providing motivating, rigorous, and meaningful experiences for students. Open-ended STEM activities will be utilized as often as appropriate, since they naturally differentiate and tailor to different learner levels.

Direct Instruction (Lecturing/Modeling) - This methodology will be used when teachers need to explain or demonstrate specific content and skills. Purposeful and systematic instruction will be based on Floridas Standards. This instruction is structured in a way to foster student content mastery. Frequent curriculum-based assessments will help to place students in ability groups for further differentiated strategies and identify students who require additional intervention.

Interdisciplinary Connections - Curricular decisions will be guided by a goal of student mastery and achievement, rather than by an effort merely to cover content. As teachers build on interdisciplinary connections, students naturally begin to merge information between and among courses, increasing the relevancy of skills and content in such courses.

Project-based Learning - Our standards-based curriculum will also flex project based learning to integrate core content areas across the curriculum. It will purposefully include the design thinking process, engineering, and thematic grade level projects. Project based learning will provide additional opportunities for students to demonstrate learning and mastery in addition to standardized assessments and the courses in technology, and robotics will provide them multiple forms of timely and relevant feedback.

Cooperative Learning Teachers will guide small-group learning, to increase communication, collaboration, and team-building skills. It is based upon a flexible small team grouping of students. Groupings may be heterogeneous or homogeneous, in relation to ability, gender, interests, etc The type of grouping will be based upon the desired lesson outcome, as dictated by best practices and the educator.

Personalized Education Plans - Students achieving below grade level will have a plan of action to remediate deficiencies. The plan will contain a students academic profile in the areas needing remediation, a timeline for remediation, and strategies that will be employed to support the students remediation. The plan allows students to prepare/set academic and personal goals for the school year and allows teachers and parents to track student progress towards their goals.

Parents will have access to academic reports through traditional means such as report cards and parent conferences,

Design Thinking Process - Design Thinking is a design methodology that provides a solution-based approach to solving problems. Its extremely useful in tackling complex problems that are ill-defined or unknown, by understanding the human needs involved, by re-framing the problem in human-centric ways, by creating many ideas in brainstorming sessions, and by adopting a hands-on approach in prototyping

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and testing. Understanding these five stages of Design Thinking will empower anyone to apply the Design Thinking methods in order to solve complex problems that occur around us in our companies, our countries, and even our planet. (Rikke Dam and Teo Siang)

Scaffolding - Teachers will identify the current developmental skills of individual students based on assessments and provide support structures to help students move to the next level. As the year goes on, the student becomes more adept at skills and at directing their learning, and learning becomes more autonomous.

Additional Supports - Full MTSS implementation

5. *Explain how the proposed instructional plan and graduation requirements will ensure student readiness to transition from grade to grade and to the next grade span upon program completion.*

Students are required to meet promotion standards in grades K-8 that include demonstrated grade

level proficiency on local assessments, standardized tests, report cards, and student work. In

determining the best educational interests of a student, appropriate grade placement decisions

shall be based upon the mastery of critical knowledge and skills including reading and

mathematics. The educational program shall provide for the continuous progress of students.

In order to be promoted to the next grade levels, students in all grades should be proficient in

reading and mathematics, which may be demonstrated through North Carolina End-of-Grade

tests, school assessments, student portfolio of work, and report card grades. A promotion

decision should not be made solely on the basis of a state assessment.

If a student appears likely to be retained, then the parent/guardian of the student shall receive at

least two (2) notices. The first notice may be a conference; the second notice must be in writing

and must be provided by the end of the third quarter. The principals office must provide in

writing an official notice of retention to the parent/guardian by the last day of school.

Students with Disabilities and Limited English Proficiency Students

Students with disabilities who do not have the ability to participate in the Common Core State

Standards and North Carolina Essential Standards may be exempt from the promotion standard;

however, exempt students must be enrolled in a functional curriculum and demonstrate evidence

of progress on alternate assessments.

All recommendations regarding special needs students will be made in conjunction with the IEP

Committee or the Section 504 Committee.

Students of Limited English Proficiency (LEP) as identified by state and federal standards shall

meet the same standards as all students; however, in accordance with federal

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law, English

language proficiency cannot be the factor that determines whether a student has not met

performance standards. All retention recommendations regarding Limited English Proficient

students should be made in consultation with the English as a Second Language teacher. Student learning will be demonstrated through the ongoing assessments in Reading, Science and Math as well as student projects and portfolios and builds in Project Lead The Way and competitive Robotics. Rubrics designed for the STEM projects will assess if the student has met the grade level and project standards. Through peer critiques, students will assess projects. Students will learn how to be reflective and give meaningful feedback to each other. Students must be designated as meeting grade level expectations and show proficiency towards mastery on report cards. Third grade students will participate in Read to Achieve and will have opportunities to meet the 3rd grade reading standards either through passing the NC BOG or EOG, mClass read assessments, the reading portfolio passages/assessments, or the RTA alternative assessment, when appropriate. 3rd grade students will attend summer camp if they have not met the Read to Achieve guidelines/standards. The inter-disciplinary curriculum model means that students are asked to transfer and build upon what is taught in one curriculum area while working in another area, and we believe this has enormous power to accelerate student learning. The interdisciplinary curriculum is all about application, transference, and assessment-based learning. The school will follow the NC grade level expectations for all subject areas to ensure that all students are prepared for each subsequent grade level. Although we intend to provide a very unique delivery model for instruction through the workshop model, the standards remain the same. All students will be required to meet the grade level expectations and will be measured on the NC Standards based report cards as published.

6. *If you are proposing a high school, describe how the proposed charter school will meet the Future-Ready Core requirements. Provide details on how the students will earn credit hours and how grade-point averages will be calculated?*
7. *Provide a school academic calendar in Appendix C (minimum of 185 instructional days or 1,025 hours).*
8. *Describe in a brief narrative below on how the calendar coincides with the tenets of the proposed mission and education plan.*

We will follow a calendar similar to the draft included. CSA will follow the posted holiday calendar for students and staff and have a slightly modified calendar for student attendance. Students will attend our school for 179 instructional days. Each school day will run approximately 7 hours with approximately 380 instructional minutes per day. In addition, we will offer an Extended Learning Program (ELP) for students identified as struggling or at-risk for failing to master their grade level expectations based upon benchmark data and formal assessments. ELP will offer enrichments for the AIG students who elect to participate in local competitions, including Odyssey of the Mind, Science Olympiad, and other clubs. Certified teachers and trained staff will assist with scaffolding instruction and providing tutoring services as needed through a protected MTSS block within the school day and during the extended learning program (ELP). Most field excursions

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will occur during the regular school day both on and off site at our local community partners who support our STEM focus. We will be offering an extension of the science program by hosting a summer program called "Camp Invention". Our proposed calendar also includes quarterly data chats for parents so the families can be well informed of their students' progress and either support or challenge them at home. All students will host quarterly data chats with their teacher serving as facilitator, thus taking ownership of their learning and progress. Finally, the calendar includes quarterly "presentation" dates for students to experience presentations from local experts in science, technology, engineering and math as well as to share their finished projects with their families and our community partners.

The operational calendar will include up to 21 days for Professional Development and conferences to ensure that the staff has the proper training to implement our selected curricular resources, utilize the best instructional practices defined above and the interpret student data to refine and reform instructional pedagogy. Professional Development is the key to improving student learning. Therefore, we will focus on appropriate and sustained professional development from 3 primary sources:

1. Trained experts in Project Lead The Way
2. Certified trained experts in Leader In Me
3. Instructional Leadership and data-driven instruction and implementation of NC MTSS.

Instructional personnel will report year 1 for 200 days. This yearly calendar is included in Appendix C.

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.*

All students will participate in district and state assessments, including; mClass Reading Assessments, Case 21, End of Grade Tests in Reading, Math, and Science, End of Course Tests. The School expects all students to work towards a higher level of proficiency on the end of year assessments, maintain within the expected achievement levels at or above grade levels of 3, 4, or 5; and/or Demonstrate more than one years growth within achievement levels as indicated by the developmental scale scores of assessments. The School will have an MTSS team to identify at-risk students through the NC Child Find program and a focused MTSS model with 3 Tiers for academics, attendance, and behavioral support for all students demonstrating need. At-risk students may include those below grade level expectations, those with frequent tardies or absences, those with exorbitant behavior referrals or those who demonstrate other symptoms of concerns. The goal of the school is to implement the MTSS model to assess and address their needs and to provide ongoing support as deemed appropriate. This Multi-Tiered Student System of Support model (MTSS) is a data-based framework for delivery that uses a multi-tiered approach to provide high-quality instruction and intervention matched to student needs and utilizes learning rates across time to inform important instructional decisions. The workshop model approach to instruction lends itself to differentiated instruction since reading, writing, and math instruction is conducted for whole group, as well as small group instruction at the students individual instructional level.

Tier 1: Core, Universal Instruction & Supports - General academic and

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behavior instruction and support provided to all students in all settings.

Tier 2: Targeted, Supplemental Interventions & Supports -More targeted instruction/intervention and supplemental support in addition to and aligned with the core academic and behavior curriculum.

Tier 3: Intensive, Individualized Interventions & Supports This is the most intense (increased time, narrowed focus, reduced group size) instruction and intervention based upon individual student need provided in addition to and aligned with Tier 1 & 2 academic and behavior instruction and supports.

All academically "at-risk" students will be placed on a Personalized Education Plan. The PEP will be maintained by the MTSS Team of teachers, parents, instructional leaders, and counselors, that convene to address the students need for additional support for students below level or failing to make gains. The PEP (appendix) will document all current levels of performance on assessments and will serve as a tool for ongoing progress monitoring. The master schedule is designed to provide protected instructional time in each core subject, with a minimum of uninterrupted 90 minutes for Reading/Language Arts and a secured time in the schedule for interventions and support. Teachers will incorporate the areas of deficiency stated in the PEP into their MTSS block. Teachers will be trained in MTSS in order to understand their responsibility to provide alternative forms of instruction, curriculum and assessment in order to remediate students and help them progress towards grade level proficiency. Teachers will have access to research based intervention materials and activities to provide interventions for content areas and social/behavioral needs. Behavioral interventions will be implemented for at-risk students whose behavior is negatively impacting their learning. Point cards, task cards, and behavior contracts will be used, as needed. The goal is to meet the needs of each student where they are and to support their development. Teachers will offer alternative forms of instruction and materials. Students who fail to make adequate progress will be recommended for further evaluation. (PEP to IEP recommendation form included in appendices).

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.*

All students who complete a registration package in the school must complete a home language survey per NC-GCS-K-000 (16 NCAC 6D.0106). If the student's primary language is not English, the school will administer the WIDA-ACCESS Placement Test. Eligibility assessment on the Kindergarten W-APT for entering Kindergarteners and ACCESS for ELLs 2.0 Summative Assessment is used for 1st 12th grade and is based on results of the Home Language Survey (HLS) process. The HLS process, identification, and subsequent placement of limited English proficient students in English as a Second Language (ELL/ESL) services are guided at the state level by the NCDPI Curriculum and Instruction Division. A committee meeting will be held to enter the student into an approved ELL program which will be comprised of the parents, ELL liaison, and assigned homeroom teacher of record.

The school will employ specific instructional programs, such as Houghton Mifflin Harcourts On Our Way to English curriculum and ACCESS English resources, practices, and strategies to ensure academic success and

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equitable access to the core academic program for our ELL students. An ELL endorsed staff member will provide instructional staff with strategies for meeting the additional needs of the student. Some of these approved methods for supporting instruction supported through LEARN NC are:

- *Provide alternative instruction whenever the class lessons are extremely difficult for the ELL student

- *Arrange small discussion and talking activities that permit students to practice verbal skills

- *Utilize additional techniques, such as cueing, modeling elicitation and chunking

- *Utilize graphic organizers such as webbing and semantic maps

- *Modify your lesson objectives according to the language level of the ELL student

- *Use manipulatives to help students visualize the math concepts

- *Allow students to use computational aids such as number lines, counters, and computation charts

We will provide equitable access to services needed, and ensure provisions and accommodations are made for the student. The workshop model approach to instruction with STEM learning and technology driven academics will naturally assist these students in any grade level (as outlined above when describing the MTSS model). Literacy support will be offered for these students and the core program will be inclusive of ELL appropriate tests that offer students a chance to demonstrate appropriate progress and growth as they move towards mastery of expectations. Plans for monitoring and evaluating the progress and success of ELL students (Kindergarten W-APT and ACCESS for ELLs 2.0 Summative Assessment) including exiting students from ELL service: The MTSS meetings as described for students failing to make academic progress will be used to monitor the progress of the ELL students. An ELL liaison will provide teachers with instructional strategies needed in the classroom to support the ELL and internal benchmark data will be disaggregated to determine learning gains and academic progress for these students. A PEP will be used to show the areas of success and growth that the student maintains. It further identifies the type of help needed to equip the student with the ability achieve high standards of proficiency and to comprehensively communicate in English. The ELL strategies will be documented in the teachers lesson plans and in the students Personalized Education Plan and ELL folder. The effectiveness of these ELL strategies will be determined by the teacher observations, student achievement and progress on EOG/EOC assessments, administrative walk-throughs, and fidelity checks from ELL resource teacher. ELL students who continue to make academic gains and show a minimum of "basic" performance levels on NC EOGs shall meet the criteria to begin exiting the student from the ELL program. The ELL Team shall convene with the parents to discuss exit plans and future support strategies for the student.

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.*

Academically or intellectually gifted (AIG) students perform or show the potential to perform at substantially high levels of accomplishment when

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compared with others of their age, experiences or environment. Academically or intellectually gifted students exhibit high performance capability in intellectual areas, specific academic fields, or in both the intellectual areas and specific academic fields. Academically or intellectually gifted students require differentiated educational services beyond those ordinarily provided by the regular educational program. Outstanding abilities are present in students from all cultural groups, across all economic strata, and in all areas of human endeavor.

Identification:

Initial criteria include superior academic achievement as demonstrated on EOG, EOC, mClass Reading Assessments, Case 21 scores. Teachers and parents of students identified as gifted candidates may also complete Renzulli checklists that identify academic and behavioral indicators for AIG students. The candidates who meet the criteria, will receive a gifted screening with parental consent (OLSAT). A certified, trained specialist will administer the test and the AIG Team composed of AIG certified teachers will analyze the results. Students who meet criteria will be recommended to our AIG program after having an initial "placement for services" meeting with our AIG Team and Differentiated Education Plan (DEP) will be developed to address that students individual needs. Our workshop model naturally lends itself to enrichment and differentiation at all of the highest levels of Bloom's Taxonomy. Students will have access to higher levels of fiction and non-fiction texts, technology infused instruction, small group instruction at their level in reading, writing, and math, and challenging STEM projects.

In a review of research on gifted students in the regular classroom, Johnson and Ryser (1996) describe five overall areas for differentiation: modifying content, allowing for student preferences, altering the pace of instruction, creating a flexible classroom environment, and using specific instructional strategies. The Workshop model and STEM components are natural supports for an AIG student. They each allow students to "go deeper" into their instructional level. The following have been established as effective strategies:

- * Posing open-ended questions that require higher-level thinking
- * Modeling thinking strategies, such as decision-making and evaluation
- * Accepting ideas and suggestions from students and expanding on them
- * Facilitating original and independent problems and solutions
- * Helping students identify rules, principles, and relationships
- * Taking time to explain the nature of errors

The AIG Team will meet with the Gifted services provider, the parents and the students to set appropriate goals which may be academic, social or emotional at its core. All gifted students will have measurable goals to meet and demonstrate higherlevel/critical thinking skills, the opportunity for presentations of culminating projects and benchmark assessments of specific goals set for each individual child. Norm referenced and criterion referenced test data will be used to measure grade level performance progression and portfolios and authentic projects will be incorporated into their daily instruction to ensure that all gifted students stay engaged and on task. We will provide opportunities for AIG students to compete in local, state, and national competitions including, but not limited to: Science Olympiad, The National Geographic Geo Bee, Mathletics competition, Robotics competitions, and Odyssey of the Mind. They will have field excursions to high schools and local STEM centers as part of their enrichment opportunities. A fully developed AIG plan will be board approved and submitted for final approval to NCDPI. This will be posted and shared to

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articulate the process and plan to all families.

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)*

We will provide a Free and Appropriate Public Education (FAPE), including special education and related services, to all children with disabilities pursuant to the North Carolina Public Schools Policies Governing Services for Children with Disabilities and federal special education guidelines and regulations. The school will also act in accordance with the Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act (Section 504) and the Americans with Disabilities Act (ADA) with respect to students with disabilities. The school A transferring EC student is a student who was previously enrolled in another district or out-of-state public/charter school with an active individualized Education Program (IEP) and who is enrolling in the charter school. Upon notification that a transferring student is one with an active IEP, the school will review the existing IEP and implement the supports identified. Yearly meetings with the IEP Team will determine student progress and additional services required if indicated. The school is aware that exceptional children must be evaluated in accordance with NC 1503-3 through NC 1503-5. A student may not be given special instruction or services as an exceptional child until after he or she has been properly evaluated, identified, and placed in the manner prescribed by rules of the State Board of Education. The IEP Team for each child must include the parent, a regular education teacher, a special education teacher, a qualified representative of the LEA, and an individual that can interpret the instructional implications of evaluation results. Request for initial evaluation or determination of eligibility. Consistent with the consent requirements in NC 1503-1, either a parent of a child, or an LEA may initiate a request for an initial evaluation to determine if the child is a child with a disability. Upon an oral request for an initial evaluation from a parent, the LEA shall provide assistance, as needed, in completing a written referral. Timeline for initial referral: (1) Evaluations must be conducted, eligibility determined, and for an eligible child, the IEP developed, and placement completed within 90 days of receipt

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of a written referral; and (2) The IEP Team must determine (i) If the child is a child with a disability under NC 1500-2.4; and (ii) The educational needs of the child. The school will display posters and brochures throughout the school pertaining to Child Find as well as a link to child find on our school website. In additional, this will also help to satisfy the monitoring visit requirements. When a public agency, as defined at NC 1500-2.27, or parent suspects that a child may be a child with a disability, he/she shall provide in writing the reason for referral, addressing the specific presenting concerns and the childs current strengths and needs. Parents may request an evaluation in writing, with copies to the principal and the schools director or coordinator of special education. The School will communicate to parents their right to request an evaluation during parent information sessions, back to school nights and individual parent conferences. The EC Coordinator is required to maintain locked files and to monitor access. All files must be requested from the EC Coordinator and returned to her. On each individual E.C folder there is an Access to Records form that must be completed each time the identified personnel go into the file. Thus, keeping a running record of who views the files, why and when. EC Coordinator will share the IEP/504 at a Glance with teachers and recommendations for classroom modifications and accommodations for students who qualify. If files are removed from the filing cabinet for any reason (audit, review of files with parent, meeting, etc.), documentation will be kept and monitored. Specific language regarding Records requests (and forms), Record confidentiality and Compliance are in our policy handbooks.

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.*

The educational program of CSA is designed to meet the needs of all students and improve academic achievement. Yearly goals include growth and proficiency for our EC students sub-group. To that end, we will implement a continuum of services to meet the needs of our students in the Least Restrictive Environment whenever possible.

Our EC team includes the EC facilitator, EC teachers, admin, general education staff and contracted service vendors as needed. The EC team will:

*Review and evaluate cumulative and exceptional childrens folders of all students coming from another state to determine their eligibility status for exceptional student educational services. Services will be provided through contracts with an appropriate agency if necessary or a school staff member will be employed having the appropriate certificate in that exceptionality. The school will provide services to students whose needs can be met in the traditional classroom setting and with additional levels of support offered by certified EC staff. Speech and Language and OT/PT services would also be included for students in this category. These services will be contracted with outside agencies by the school. In providing for the educational needs of the exceptional student, the Principal, Exceptional Children teacher and

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the general education teacher will utilize the regular school facilities, which are physically designed and adapted to meet the needs of exceptional students as required by the Americans with Disabilities Act (ADA) and IDEA. The IEP Team will determine the least restrictive environment and proper placement within the full continuum of services offered for students with special needs. Appropriately licensed teachers will serve students meeting the eligibility criteria for special education in our educational program. The EC Team will determine a students eligibility for services based on the results of the evaluation/re-evaluation data. Placement of the student with disabilities services will be in the least restrictive environment. The EC Team will:

- *Make placement decisions and ensure that the individual instructional needs of the exceptional student are reflected in the students IEP

- *Review placement decisions annually at the IEP review meeting

- *Ensure accurate placement occurs for the student based on that students IEP and Free and Appropriate Public Education guidelines

We will provide students with the services and support they require based upon their IEP and ongoing progress monitoring. Teachers will be provided with additional support materials and training that is specialized and scaffolds the learning, such as Wilson Reading and Touch Math. We will support unique social/emotional needs of our students. The EC teachers will utilize various social stories and curriculum, such as Superflex. Furthermore, the general education and EC teachers will be trained in Responsive Classroom so that they can utilize Responsive Classroom techniques and strategies to support our EC students. Contracted personnel will provide the continuum of services and materials needed for Speech/Language, PT and OT as written in the IEP and appropriate. We will develop and oversee annual strategic plan for exceptional children services that includes (1) how students will be identified and evaluated for exceptionalities,

(2) the procedures for developing and implementing IEPs,

(3) How students with exceptionalities will be integrated in the school's instruction and culture, and (4) specific procedures and expectations for including parents and other stakeholders in the process of delivering special services.

Based on the enrollment of exceptional children, the school will hire and train the appropriate number of teachers/para-professionals, to ensure adherence to the Federal and state guidelines for class size and caseload, to ensure all necessary IEP services are being implemented.

Opportunities for in-service education regarding Least Restrictive Environment and working with mainstreamed/integrated exceptional students will be provided for school administrators, teachers, school staff, parents/guardians, students, and the community. These in-service workshops will be designed to promote a better understanding of the special education process and exceptional students. Teachers will be provided with appropriate accommodations and strategies for working with EC students. The school shall utilize this supplemental EC funding to provide for each exceptional students education needs. We will use a variety of assessments to determine the effectiveness of the program including district and state assessments, formal and in-formal assessments, and classroom performance. The IEP team considers the following factors in the development, review, and revision of the IEP:

- a) Strengths of the student and concerns of the parents for enhancing the education of their child
- b) Results of the initial or most recent

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evaluation or reevaluation c) As appropriate, results of the student's performance on state or district-wide assessments d) Academic, developmental, and functional needs of the student Quarterly updates will monitor the students progress towards meeting the measurable annual goals as stated on the IEP. The goals include academic and functional goals designed to meet the student's needs that result from the student's disability to enable the student to be involved in and make progress in the general curriculum. As appropriate, the goals enable the student to participate in appropriate activities and meet each of the student's other educational needs that result from the student's disability. The school will develop procedures for updating, at least annually, the effectiveness of the individualized education programs in meeting the educational needs of special education students, including parent/family involvement in the evaluation process. Students eligible for special education and related services will be re-evaluated every three years or sooner if deemed necessary by the IEP team, in accordance with state and federal requirements. For accountability purposes, all students will participate in assessment procedures for students with disabilities. Appropriate accommodations will be in place based on the individual needs of each student to afford an accurate assessment. Accountability for the learning of all students is the cornerstone of the School. The North Carolina End-of-Grade (EOG) Test and Alternate Assessments are used to measure the achievement of individual student on the NCSCS. EC students are required to participate in state and district assessments for accountability purposes. The ESEA and the IDEA requires that students with disabilities participate in accountability measures and are provided access to the instructional support and resources their IEP requires. The selected curricular program includes materials and support for EC students who need alternative materials and assessments. All EC students will be measured for progress based on their IEP and under the auspices of the entire EC team. ALL students, including EC students will be exposed to grade level functional curriculum every year. Students will have the opportunity to work on grade level appropriate curriculum, but they will also be offered additional resources and supports at their individual functional levels. EC students will have additional supplemental curriculum available to help meet their needs and their current level of performance (below level texts, remedial math materials, intervention programs, manipulatives, etc.). When the need arises, students will be entitled to extended content standards. Students with those modified standards would be exempt from gen ed promotion standards.

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*

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include plans for the "At-Risk" population.

Clemmons STEM Academy will comply with the North Carolina Accountability Model including all BOG EOG, EOC and Read to Achieve tests. We will implement an educational and assessment program that combines successful, standards-based instructional practices with ongoing bench marking assessments. The School expects to enroll students from 5 or 6 neighboring schools with average School Performance Grades (SPG) ranging from 40-65 and therefore understands that laser-like focus will be needed to meet each child where they are and set appropriate growth goals. These are included in a table format in the appendices and below. SCSA will strive to become a B graded school within 3 years by examining student performance data and addressing areas of deficiencies in each content area and grade level. Teachers will work together in vertical planning sessions to review student performance data and level set expectations and improvement plans.

In addition to using the standardized NC exams, the School will use additional bench marking assessments such as MClass, Case 21 and IReady as appropriate to measure student progress and mastery. The School's priority is to push student growth individually and collectively through focused, data driven instruction, differentiation and careful attention paid to individual student needs.

CSA will also administer classroom assessments that include: spelling inventories, DRA, running records, explicit writing rubrics, and assessments for STEM learning provided by PLTW modules, Go Math, STC Science and Engineering is Elementary. The assessment tools are used to analyze student performance on state and district assessments and to create school-based interim reports that are aligned to benchmarks within the Standard Course of Study. The result is a balanced approach to assessment that combines the benefits of state, district and school-wide assessments with the instructional value of day-to-day classroom assessments and assignments.

By identifying the state-specific standards that students must master in order to move to the next grade level teachers will determine what students should know and be able to do to demonstrate proficiency on high-stakes assessments, as well as, in the foundational skills and understanding necessary for success in future grade levels. CSA will implement a continuous model to measure academic progress and to measure instructional effectiveness and teacher capacity. The data-driven cycle of assessment, analysis, and action, based on , is part of the school's culture and is the top priority for school-wide improvement. Leadership and teachers will begin to identify/implement additional strategies to use for closing the gaps and promoting growth by utilizing the benchmark data from TE 21 or MClass as well as other formal assessments to identify the following:

- *What is the present level of proficiency (each student)
- *What should the present level of proficiency be
- *What can teachers do to close the gap? Implementation of NC model of MTSS
- *Identify students who need additional instructional support and increase the 1:1 and small group instructional time for those students.
- *Use varied, effective strategies to instruct diverse learners and to assess content understanding and mastery levels
- *Use test and other information on students' performance in instructional planning

Remedial students and students with special learning needs will have access to Tier 2 and Tier 3 interventions and supports, supervised study time and tutoring after school to accelerate their progress. In addition, students

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performing at or above grade level will be offered opportunities to maximize potential and advance progress through acceleration and enrichments. Teachers will use the Progress Monitoring Plan document to record time spent with individual and small groups of students for interventions based upon deficiencies identified through data driven metrics.

Promotion Requirements

Students are required to meet promotion standards in grades K-8 that include demonstrated grade

level proficiency on local assessments, standardized tests, report cards, and student work. In

determining the best educational interests of a student, appropriate grade placement decisions

shall be based upon the mastery of critical knowledge and skills including reading and

mathematics. The educational program shall provide for the continuous progress of students.

In order to be promoted to the next grade levels, students in all grades should be proficient in

reading and mathematics, which may be demonstrated through North Carolina End-of-Grade

tests, school assessments, student portfolio of work, and report card grades. A promotion

decision should not be made solely on the basis of a state assessment. Third grade students who do not pass the EOG under Read to Achieve requirements

will attend summer reading camps and have the opportunity for promotion through a variety of approved alternative assessments.

If a student appears likely to be retained, then the parent/guardian of the student shall receive at

least two (2) notices. The first notice may be a conference; the second notice must be in writing

and must be provided by the end of the third quarter. The principals office must provide in

writing an official notice of retention to the parent/guardian by the last day of school.

Students with Disabilities and Limited English Proficiency Students

Students with disabilities who do not have the ability to participate in the Common Core State

Standards and North Carolina Essential Standards may be exempt from the promotion standard;

however, exempt students must be enrolled in a functional curriculum and demonstrate evidence

of progress on alternate assessments.

All recommendations regarding special needs students will be made in conjunction with the IEP

Committee or the Section 504 Committee.

Students of Limited English Proficiency (LEP) as identified by state and federal standards shall

meet the same standards as all students; however, in accordance with federal law, English

language proficiency cannot be the factor that determines whether a student has not met

performance standards. All retention recommendations regarding Limited English Proficient

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students should be made in consultation with the English as a Second Language teacher.

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.*

The academic and personal success of students is at the forefront of all processes and procedures. The School recognizes that without a safe and orderly environment for students and teachers, these extraordinary curricular achievements cannot be made. The School will adopt and follow the discipline and grievance policies contained in the handbooks included in the appendix identifying specific offenses/consequences and expectations of student behavior and our behavior plan.

The School will implement The 7 habits of Highly Effective Students through The Leader In Me program to demonstrate a leadership and service based community. The School will be provided formal training in and will create a school based leadership team (Lighthouse Team) designed to support and promote positive behavior throughout the school. Teachers will strive to use informal classroom management techniques that are proactive and diffuse issues before they escalate. Teachers will guide students toward responding appropriately to difficult situations. The 7 Habits of Highly Effective Students will be used as a resource tool and will complement the student code of conduct. The School believes that if it can instill in students these seven habits then behavioral or disciplinary issues will be reduced. The behavioral/social issues we believe can be mitigated through character education and the 7 habits are:

Bullying Students will value each other and treat each other with respect. Through learning the value of listening to others, they will be able to value multiple points of view and communicate effectively.

Conflict resolution Students learn to build relationships effectively and turn conflict into "win-win" situations.

Obedience to teachers and attention to coursework Students will value goal-setting and prioritizing to achieve these goals. Students learn the connection between their coursework and their future goals. This promotes respect and collaboration between teachers and students.

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Maintaining healthy habits Drug and alcohol prevention as well as prevention of self-harm (cutting, choking, etc.) will be highlighted through building healthy habits of body, heart, mind, and soul. Students learn the connection between decisions made now, whether healthy or not, and future goals and quality of life.

Grievance:

1) Raise the grievance with the lowest-level interested member of the faculty or staff and seek to resolve the issue. The faculty or staff member may involve other, higher-level members of the school staff. CSA will endeavor to resolve issues at this level within 3 school days of initiation of this grievance reporting level.

2) If the problem persists and cannot be solved at the CSA staff level, the Aggrieved Party can appeal to the appropriate administrative head - such as the Principal - in writing. CSA will endeavor to resolve issues at this level within 3 school days of initiation of this grievance reporting level.

3) If the grievance is not satisfactorily resolved by the Principal, the grievance may be submitted to the Board Chair in writing for mediation. The Board will review and their decision will be final. Resolution at this level will occur by the next regularly scheduled Board meeting, unless that Board meeting is less than 3 school days after reporting at this level.

The only student disciplinary matters that may be appealed to the Board are those taken under N.C. Gen. Stat. 115C-390.7, 115C-390.10, or 115C-390.11. Administrative recommendations to exclude a student from the School can also be heard by the Board.

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Section III: Education Plan Concerns and Additional Questions		
If this is a STEM school, why is STEAM being addressed in the description? How will STEM, Project based learning and Project Lead the Way increase student performance?	Shannon Sellers	Instructiona
***Is the applicant proposing a STEM school or a STEAM school? The description is not clear. ***What are the assessment strategies associated with the selected instructional model? ***How does this instructional model meet the needs of the targeted student population and lead to improved student performance?	Kebbler Williams	Instructiona
Is there confusion as to whether this is a STEM or STEAM school? (i.e. 1st paragraph of the instructional section)	Shannon Stein	Instructiona
Better description needed on how this will meet the needs of the targeted population. Now stating STEAM in lieu of STEM.	Jessica Kelly	Instructiona
I like the way that STEM is being implemented in this plan.	Steven Walker	Curriculum a
Does the school have guidelines or goals regarding classroom size or teacher/student ratio?	Amy Ruck Kagan	Curriculum a
What will be the main instructional delivery method? (i.e. there are so many listed that it seems a bit of a "shotgun" approach to what they may use) Why would a strong school not take advantage of more instructional time? (i.e. # of days of instruction listed at 179) Is 21 days of PD reasonable for regular teacher pay?	Shannon Stein	Curriculum a
***What is the projected class size at each grade level? ***If this is to be a STEM school, why is there a separate block of time for STEM? Why is it not interwoven throughout the school day? ***The calendar narrative and the calendar included in the appendix do not match.	Kebbler Williams	Curriculum a
Calendar days inaccurate. There seems to be an excessive number of programs/instructional methods being listed. With so many programs in year one will this be confusing to students and staff?	Jessica Kelly	Curriculum a
What will be the average class size, student-teacher ratio? Which method will be the main method for instructional delivery? How will teachers learn each of the methods and be experts with so many methods? The calendar provided in the appendix shows 178 student days and the narrative says 179. Which is correct?	Shannon Sellers	Curriculum a
Students are not exited from ELL based on classroom performance. Students that are identified ELL through the WIDA-ACCESS take the ACCESS test each year that determines eligibility. Are you not planning to offer this state test? Are the ELL Liaison, ELL Resource teacher and the ELL Endorsed staff member the same person? Who is on the AIG team? AIG doesn't mean more work, what do you mean by presentations of culminating project? Is this an addition to the project that others will be completing or is this an extra project because the student is AIG? The project should be differentiated to challenge the AIG student but not an additional project per say.	Shannon Sellers	Special Prog
Clarification needed on ELL positions. Who is included on the AIG team?	Jessica Kelly	Special Prog
Who sits on the AIG team?	Shannon Stein	Special Prog
The school lists ELP (extended learning program) for at-risk students, yet are they taking advantage of maximum amount of direct instruction time?		
***What is the difference between the ELL Liaison, the ELL Resource Teacher, and the ELL-endorsed Staff Member?	Kebbler Williams	Special Prog
***How will the school identify students who are enrolled that have previously been	Kebbler Williams	Exceptional

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protected under Section 504 of the Rehabilitation Act? ***How will student evaluations and assessments be completed for students who may be eligible for special education services? ***How will the records of students with disabilities and 504 Accommodation Plans be requested from students' previous schools? ***How will the records of students with disabilities and 504 Accommodation Plans remain confidential?		
Clarification needed on 504 plans and processes.	Jessica Kelly	Exceptional
There is no information regarding 504 plans and the implementation and requirements. How will these students be identified? How will 504 Plans be requested from previous schools?	Shannon Sellers	Exceptional
s there a missing or extra word in this sentence? (The school A transferring EC student is a student ...). What is the meaning f this sentence fragment? (Request for initial evaluation or determination of eligibility.).	Robert McOuat	Exceptional
***What is the plan to provide services for students with severe needs who require a separate setting? ***What is the source of the supplemental EC funding mentioned? ***How will the implementation of the IEP be reported to the students and parents? ***How does the educational plan for serving Exceptional Children align with the overall proposed curriculum, instructional methods, and the school's mission? ***Students are to be served in the Least Restrictive environment - period - not "whenever possible." Further the school is responsible for providing a full continuum of services at all times - not "whenever possible."	Kebbler Williams	Exceptional
Concerns over serving of EC students. "whenever possible" is concerning - what will occur if there are students with more severe needs.	Jessica Kelly	Exceptional
Students are given the right to a Free and Appropriate Education at all times not "whenever possible." How will your provide this at all times? You state, "The school will provide services to students whose needs can be met in the traditional classroom setting and with additional levels of support offered by certified EC staff" how will you handle students that require a separate setting? Where does the supplemental EC funding come from?	Shannon Sellers	Exceptional
***What are the student performance standards for the school as a whole? ***What are the school's exit standards for the last grade served? ***Why are there no promotion standards or exit standards related to STEM?	Kebbler Williams	Student Perf
What is going to be considered proficiency for promotion? What steps will occur prior to recommending a student for retention?	Jessica Kelly	Student Perf
What is considered proficient for promotion? what will be considered mastery on the bench marks?What are your STEM goals for student performance? Other than becoming a B School, what are your specific goals for student performance? With all the bench mark assessments you provide, how will this drive instruction?	Shannon Sellers	Student Perf
***The discipline plan included in the appendix is not for this school. It includes high school students and this school will ultimately only serve grades K-8. ***What are the due process rights for students with disabilities when a suspension or expulsion is recommended by the principal?	Kebbler Williams	Student Cond
Is there a process in place for Due process for students with disabilities? What criteria leads to suspension? The Discipline Plan in Appendix O references high school and middle school. Is this your plan? If so, why include high school when you are applying to be a K-8 school?	Shannon Sellers	Student Cond
How will students with disabilities be handled in terms of conduct? Discipline plan is not indicated for this school; showing high school when this is a K-8 application.	Jessica Kelly	Student Cond
Is the list of preliminary offenses that could lead to suspension/expulsion listed? Is there a clear process of how students with disabilities will be addressed as it relates to student conduct violations?	Shannon Stein	Student Cond
Does the school have policies to address students that do not follow the leadership plan or demonstrate behaviors contrary to those accepted?	Amy Ruck Kagan	Student Cond

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Reviewer	Score
Alan Hawkes	
Alex Quigley	
Amy Ruck Kagan	Pass
Cheryl Turner	Fail
Steven Walker	Pass
Shannon Stein	Fail
Robert McOuat	
Lynn Kroeger	
Kebbler Williams	Fail
Jessica Kelly	Fail
Deanna Townsend-Smith	
Shannon Sellers	Fail

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IV. GOVERNANCE 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 upon application submission.

Name of Private Nonprofit: Clemmons STEM Academy, Inc.

Mailing Address: 2132 Greenbrook PKWY Weddington NC

City/State/Zip: Weddington NC 28104

Street Address: 2132 Greenbrook PKWY

Phone: 336-287-6405

Fax:

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

FEDERAL TAX ID: 82-2698449

Tax-Exempt Status 501 (c)(3)

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

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

NOTE: If the non-profit organization has yet to obtain the 501(c)(3) status, the tax-exempt status must be obtained from the Internal Revenue Service within twenty-four (24) months of the date the Charter Application is given final approval.

Governance and Organizational Structure of Private Non-Profit Organization:

The private nonprofit corporation is the legal entity that has responsibility for all aspects of the proposed charter school. Its members should reflect the ability to operate a charter school from both business and education perspectives.

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

Board Member Name	Board Title	County/State of Residence	Current Occupation	Past or Present Professional Licenses(s) Held	Has any disciplinary action been taken against any of these professional licenses?
Linda	Board	FORSYTH	Retired		

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Petrou	Chair				
Courtney Ageon	Board Vice Chair	GUILFORD	CPA		
Scott Cumbie	Treasurer	FORSYTH	Systems Architect		
Charlie Mellies	Secretary	FORSYTH	Criminal Defense Attorney		
April Broadway	Board Member	FORSYTH	Internal Controls Officer		

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.*

A North Carolina Not-for-Profit Corporation has been established for sole and exclusive purpose to establish and operate a Charter School under the Charter School Act of 1996, as codified in North Carolina Statutes 115C-238.29A et seq. All business and affairs shall be managed by a volunteer Board of Directors, or by such committees as the Board of Directors may establish to accomplish the goals of the school and its programs. Directors will be required to demonstrate commitment to the mission and purpose of Clemmons STEM Academy, and will be required to attend regular meetings and accept committee memberships. Such committees shall have such responsibilities as the Board of Directors shall specify. Committees may include, but are not limited to: Finance, Personnel, Facility, Curriculum, Exclusion or others as needed. The Board will bear final responsibility for the schools academic success, organizational viability, and faithfulness to the terms of the charter by developing and approving the annual budget in addition to school policies. It will set goals and review strategy to continually guide the school towards the fulfillment of its mission. The board shall perform a national search utilizing a wide array of established educational leadership job posting sites, and will hire the founding principal with the following characteristics at a minimum:

- Masters Degree in Educational Leadership or equivalent
 - Professional Educators Certificate in Educational Leadership or Equivalent
 - Minimum three years prior experience as a principal of a charter school
 - Verifiable and quantifiable evidence of ensuring student academic success
 - Prior experience as a start-up school leader
- The Board of Directors will supervise the school principal via a continuous improvement and reflective leadership process consisting of data review of the following:
- Academic benchmark and end of course/grade data
 - Financial data including monthly budget versus actual, cash flow, enrollment and financial audits
 - Stakeholder data including annual parent, staff, student surveys, staff and student attrition data
 - Strategic planning toward achievement of the schools short term and long term goals.

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*

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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.

The Board of Directors currently consists of five and may include up to a maximum of nine members. Directors shall serve for terms of three years, or until their successors assume office. The powers of the Board are comprehensive in scope, designed to effectively operate the charter school, and are detailed in the bylaws. Duties of the board are to attend scheduled meetings, contribute through expertise and service, and vote on matters related to school, in the best interest of the school and in support of the schools mission and purpose. The Boards officers minimally consist of a Chairperson, Vice Chairperson, Secretary, Treasurer and such other offices as deemed appropriate by the Board of Directors. Designated officers shall have such authority to perform duties as sanctioned by the Board of Directors, in addition to specific responsibilities outlined in the bylaws. These officers shall be elected by majority vote of the Board of Directors. The current skills and expertise represented by the Board are purposefully requisite to the needs of Clemmons STEM Academy: expertise in education, specifically both regular public and charter school, local and national business expertise, financial expertise, and construction expertise. Additionally, professional educators serve as a preponderance of the Board, a majority of the Board are parents of school age children, and all Board members are local residents with a deep and pervasive connection to the local community. The structure and composition of the Board will ensure success of the school by combining a well-established governance model evidenced by the highly successful charter school they govern, utilizing talented local stakeholders with not only a vested interest in local educational choice, but verifiable experience in opening and operating highly successful charter schools. The success of the school will be evaluated through systematic review of the schools goals through an annualized school improvement process, state academic data collected via the READY accountability model, compliance checks from the state and successful financial audits. The principal will be evaluated utilizing the evaluation process for school leaders found within the NC Educator Evaluation System (NCEES).

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 initial founding board in 2017 was recruited by a grassroots effort targeted toward attracting an active group of community members which together provide the necessary balance of educational background, parent support, business acumen and local experience necessary to open and operate a highly successful heterogeneously populated charter school. Interested candidates attended an informational meeting hosted by the original founding board member, and chose to serve in support of the schools mission and purpose. Board seats have staggered terms such that 1/3 of the positions expire each year, to allow for consistency in board operations while at the same time allowing for the composition of the board to thoughtfully evolve in parallel to the school. New board members shall be elected by a majority vote of the current Board of Directors members, or by such committees as the Board of Directors may establish pursuant to the bylaws. Vacancies occurring due to events outside of the natural term expiration will be filled as quickly as possible with qualified candidates as identified and approved

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pursuant to the bylaws, and any replacement member will continue the term of the previous board member as to preserve imposed staggered term limits.

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

The board shall meet no fewer than ten times per year, and shall conventionally meet once per month: including the annual meeting in June, a school readiness meeting in August, and mandatory monthly meetings during the school year. The board will schedule additional meetings as needed.

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.

The staggered term limits imposed via the bylaws ensure that there remains a consistent number of inveterate Board members who can provide guidance and leadership to new members of the Board. Each new member shall receive a Board Book which will include: a copy of the charter application, charter contract, North Carolina School Board Association Governance Standards, bylaws, school policies and procedures, budget, prior year financial audit, conflict of interest policy and prior year board minutes. At the first meeting following a new member joining the board, new member orientation training will be conducted by the Board Chair. This training will explain all items within the Board Book, and articulate how the documents are used in the discharge of duties as a member of the Board. In addition to new member orientation, the Board will undergo at least six hours of professional development, in one hour modules at each board meeting, in the following areas: Charter School Legal and Legislative Updates, Financial Policy and Oversight, Data Driven Decision Making, School Improvement Planning, Instructional Leadership, and Effective Governance. All board members are required to attend the trainings, or otherwise acquire the information after the board meeting, and pass an assessment after each module which demonstrates understanding of the curriculum.

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.

The Board of Directors will accept only the highest standards of ethical and moral conduct from its Members and the school staff. Due to the important role played by the Board, all Directors undergo the same background check procedures as employees of the school, and will conduct themselves in accordance with the North Carolina School Boards Association(NCSBA)standards. A Director may be removed with or without cause only by a simple majority vote of the Board of Directors at any meeting. Directors will be considered for dismissal for any one the following breaches of integrity, including violation of confidentiality, undermining the directives of the Board, being indicted or convicted of a felony, failing to oversee and abide by terms and conditions stated in the bylaws, or by acts that would constitute a general breach of integrity in the views of the members of the Board of Directors. Matters that come before the Board of Directors which places a Director in a perceived conflict of interest between the interests of the Corporation of the Board member, his/her family, and/or business, the Director with the conflict shall be prohibited from participating in the discussion and recuse his/herself from voting on the particular matter in the event the Board upon review of the potential conflict of interest deems that a conflict in fact has or will occur. The

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Board of Directors shall comply with the voting and disclosure provisions of Director Conflict of Interest Section of the Non-Profit Corporation Law NCGS 55A-8-31. Article XII of the bylaws details specific and comprehensive measures the Board adopts to proactively avoid actual conflicts, including the requirement that all Board of Directors sign an annual statement that he/she:

1 has received a copy of the conflicts of interest policy

2 has read and understands the policy,

3 has agreed to comply with the policy, and

4 understand that the Corporation is a charitable organization and that in order to maintain its federal tax exemption, it must engage primarily in activities which accomplish one or more of its tax-exempt purposes. The bylaws also include a due process by which a perceived conflict may be investigated fully in order to decide if a legitimate conflict exists, and empowers the Board to act in a decisive manner to correct the conflict should one exist. As of the submission of the charter application, the Board of Directors has signed the annual statement so that no perceived or real conflicts exist, or will arise should the Clemmons STEM charter application be approved.

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

Guided by the schools mission, the board will set policies regarding finances, enrollment, program evaluation, and other operational aspects. The boards policies will have two purposes: to provide direction to the school staff in implementing the schools goals, and to ensure the school meets legal requirements and obligations of the charter contract. The board may also adopt policies throughout the year to address situations and crises. To adopt proven practices and avoid adopting unsound or illegal policies, the board may research policies established at other charter schools in the county and state. Guided by existing research and established best practice, the board may also seek legal consultation when developing policy. Both the board and school leadership will adopt the "School Improvement Life Cycle" as published by AdvancED/SACS, to guide all decision-making processes and particularly those that involve school policy. The cycle begins and ends with the gathering and thoughtful analysis of relevant school data. Goals will be established for school policies that match a SMART format (Specific, Measurable, Achievable, Relevant and Time-Bound). The board will implement the policies in furtherance of the schools mission, and will evaluate the impact and relative effectiveness of the policies, thus renewing the cycle of continuous improvement. Furthermore, the school will undergo AdvancED accreditation in its third year of operation to provide external review and feedback to the schools programs and decision-making process.

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.

There are two main advisory groups who serve critical roles within the organizational structure of Clemmons STEM Academy: the School Advisory Council (SAC) and the Parent-Teacher Organization (PTO). The School Advisory Council is responsible for the development and review of the School Improvement Plan, in addition to other roles and duties assigned to it by the Clemmons Board of Directors. Given the importance of the School Improvement Plan as the document which will both guide and evaluate the school's programs, both the Principal and the Board Chair will serve as adhoc members of the SAC. The remaining composition of the SAC will consist of parents, staff, community members and, when appropriate, students. To

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ensure that parents and the local community have the largest voice in the school improvement process, at least 51% of the SAC will be comprised of non-school staff. The Parent-Teacher Organizations role in the school is responsive in nature, therefore the PTO will evolve to meet different needs as the school grows and becomes more established. In the initial years, the PTO will help to establish a positive school culture, broaden the base of volunteers, and increase school-to-home and home-to-school communication. As the school becomes established, the PTO will transition toward increasing vibrancy to the school programs through development of social and community service opportunities for the school. The membership of the PTO will be free of charge to any and all school community members in the first two years of the school. An executive committee will be established in the first year of the school to provide leadership and direction to the PTO. The Principal as well as an active Governing Board member will serve on the PTO executive committee in order to ensure continuity of the schools mission and purpose as realized in the decisions, actions and events that arise from the PTO.

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

Parents or Staff who have a grievance at Clemmons STEM Academy will use the following procedure in order to solve issues with other interested parties. Grievances will be resolved promptly, equitably and in the educational best interests of children. This policy is not intended to replace other professional, informal discussion and resolution of issues as they may arise. The Aggrieved Party will raise the grievance with the lowest-level appropriate member of the faculty or staff via written note or email, and the staff member will then seek to resolve the issue. The faculty or staff member may involve other, higher-level members of the school staff. Staff will endeavor to resolve issues at this level within 3 school days of initiation of this grievance. If the problem persists and cannot be solved at the staff level, the Aggrieved Party can appeal to the appropriate school leadership team member. School leadership will endeavor to resolve issues at this level within 3 school days of initiation of this next step. If the grievance is not satisfactorily resolved by School Leadership, the grievance may be submitted to the Board Chair in writing for mediation. The Board will review and their decision will be final. Resolution at this level will occur by the next regularly scheduled Board meeting, unless that Board meeting is less than 3 school days after reporting at this level. The only student disciplinary matters that may be appealed to the Board are those taken under N.C. Gen. Stat. 115C-390.7, 115C-390.10, or 115C-390.11. Recommendations from the Principal to exclude a student from the School can also be heard by the Board.

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

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4. A copy of the articles of incorporation from the NC Department of the Secretary of State.
(Appendix H)

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:

Outline below, 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.

Teachers-Elementary 24.00

Teachers-Middle 3.00

Teachers Arts/STEM/Music 3.00

Teachers PE 2.00

Teacher Assistant 4.00

EC Teacher 3.00

EC Teacher Assistant 1.00

Salary STEM elective 1.00

Salary - Principal 1.00

Assistant Principal 1.00

Office 2.00

Business Manager 1.00

Salary - Registrar 1.00

Salary - Technology 1.00 Maintenance/Cafeteria 2.00

Nurse/Health Officer 1.00

Guidance 1.00

After School Coord 1.00

P/T teachers (aftercare)3.00 Bus Drivers 2.00

Substitutes as needed

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

The Board and leadership will active advertisements on targeted social media, word of mouth recruitment and partnerships with local universities to

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assign interns to the school who will be considered for possible openings that may arise based on their performance. The School will work through the network of teachers who are connected to Educational programs and Professional Development and will conduct two job fairs a year to organize efforts that will recruit instructional experts to serve as teachers at the school and increase the rigor and relevance of the teaching and learning; create a competitive salary schedule that includes performance incentives to attract high performing teachers; and utilize local media venues to advertise openings. CSA will create and advertise a job description to attract instructional leaders committed to STEM and willing to work in an innovative, collaborative environment. The Board is committed to ensuring that its leaders have strong interpersonal skills to promote professional growth among the instructional staff. This school culture of excellence results in high retention rates and high academic performance. In addition, the school will have a clear human resource process that demonstrates its commitment to employees by addressing their concerns. Implementation of fair personnel policies, feedback and support for staff including annual raises and stipends for superior work will ensure teacher retention. The Leader in Me program is also designed to cultivate an embedded culture of excellence, leadership and commitment to the school community.

2. Provide a description of the relationship that will exist between the charter school employees and the nonprofit board.

The School will be a not-for-profit, at-will, private employer and will not participate in the NC Retirement System. The employees will be employed by the school under the purview of the Governing Board. The School will provide a competitive compensation plan to attract and retain good, loyal and committed employees. The Board will promote a healthy, productive work environment that rewards creativity and performance. * The Board is committed to ensuring that its leaders have strong interpersonal skills to promote professional growth among the instructional staff. This school culture of excellence results in high retention rates and high academic performance. In addition, the school will have a clear

human resource process that demonstrates its commitment to employees by addressing their concerns.

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

* School is an equal opportunity employer and will not discriminate against any applicant, contractor or employee on the basis of age, race, color, religion, sex, national origin, veteran status, disability, genetic information or other legally protected status, except where it is an occupational qualification. This policy extends to all terms, conditions and privileges of employment as well as the use of the schools facilities and participation in all activities sponsored by the school. It is also Schools policy to ensure that all employees are treated equally on the basis of merit and performance competence with regard to any and all terms of conditions of employment, including recruitment, hiring, compensation, promotions, demotions, assignments, trainings, layoffs, and terminations.

According to NC Charter School law GS_115C-238.29F (e) (1), all NC Charter Schools shall adopt a background check policy mirroring the local board of education policy that requires an applicant for employment to be checked for a criminal history, as defined in G.S. 115C-332. School is required to apply

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its policy uniformly in requiring applicants for employment to be checked for a criminal history before the applicant is given an unconditional job offer. According to NC charter School law, a charter School may employ an applicant conditionally while the board is checking the person's criminal history and making a decision based on the results of the check.

Employment with the School is based on mutual consent; both the employee and the School have the right to terminate employment at any time, with or without notice, for any lawful reason, or for no reason at all. The most common circumstances under which employment is terminated include resignation, discharge, reduction-in-force, or retirement. The full hiring policy/procedure is included in board approved policy handbooks.

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

* The board recognizes that in order to attract and retain qualified, effective school staff members, that both the salary and benefits offered to staff must be competitive with the existing market. As evidenced in the schools budget, the average salary for all instructional staff is \$42,000 per year. The School expects to hire a range of instructional staff with a wide range of experience, and will adjust the budget accordingly. School Leadership salaries also reflect local market rates as well. Non-instructional staff has been budgeted to include a range of \$14-15 dollars per hour for front office and custodial staff, which is the competitive market rate. For other specialized non- instructional 12 month staff such as the Business Manager, the board will be seeking Bachelors Degree or higher candidates for these 12 month positions, and have created salary schedules as proposed in the budget to confer salaries within the current market that are competitive. The school will offer health insurance through the North Carolina State Health Plan and to all employees who work an average of 30 hours per week or more. Additionally, dental, vision insurance, disability, and life insurance will be offered to employees at market rates and to those who qualify according to applicable state and federal law. A 403(b) tax-advantaged retirement plan with an employer match of 100% of up to 3% of the employees contribution will be offered to all employees through a licensed, reputable vendor. Paid Time Off (PTO) will also be offered to full time employees, up to 10 equivalent work days per year. Vacation time will be offered to 12 month full time employees, and will be negotiated individually per position.

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

* Employment with the School is based on mutual consent; both the employee and the School have the right to terminate employment at any time, with or without notice, for any lawful reason, or for no reason at all. The most common circumstances under which employment is terminated include resignation, discharge, reduction-in-force, or retirement. No provision in this handbook or any other personnel policy or procedure document shall be construed to the contrary or construed to limit this right in any way.

The grievance process is as follows:

* Step 1: To file a grievance, an employee must submit a letter in writing to the Principal of the School. If the Principal of the School is implicated in the grievance, the grievance should be submitted to the Chair or Vice Chair of the Board.

* Step 2: The Principal of the School shall have up to five business days from the time they receive the formal grievance to respond to the grievance

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in writing. The employee shall submit their satisfaction to the Principal in written form.

* Step 3: If the employee is not satisfied with the response the employee may file an appeal by submitting a letter in writing to the Board. This must be done within 5 business days of the initial response from the Principal .

* Step 4: The appeal shall be considered by the Board at its next regularly scheduled monthly meeting, provided such meeting is more than seven days after the filing, or the Chair of the Board of Principals may call a special meeting of the Board to consider the appeal in accordance with the Schools bylaws. The Board will consider and discuss the grievance at the meeting in accordance with Open Meetings laws. Any decision of the Board will be communicated to the individual who filed the grievance within five school days. The Boards decision concerning the grievance is final.

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

Some instructional support personnel may have dual responsibilities such as early/aftercare and cafe or custodial. Dual function staff will be paid out of the general operating budget.

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.

* CSA will have at least one staff person certified in EC, ELL, and AIG in anticipation of serving these students prior to the school opening. The Principal and Registrar will review completed enrollment packages with SCSA leadership to identify all supplemental staffing needs based upon student population enrollment data. As the school opens, data collected from cum files, home language surveys and Student Search measures will help the school quantify the number of additional certified staff needed to provide the appropriate support services and materials for these student populations. The school will continue to hire appropriate numbers of certified staff as students who enroll and are entered into EC, AIG or ELL programs. This will be an ongoing process to ensure the needs of all students are met and provided a continuum of services required by their IEP, EP and ELL status. The School will contract for additional services such as Speech, PT and OT etc reflected in budget tool.

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).

* Below is a list of primary roles, responsibilities and qualifications for integral staff positions. Complete job descriptions are available in the Policies and Handbooks. School is required by the state of North Carolina to conduct criminal background checks for all staff including full-time, part-time and substitutes, which will be done upon the acceptance of a conditional employment offer. A criminal records check may also be conducted on a selective, random or rotating basis for any current employees, annually rehired employees, and employees whose contracts are scheduled to be renewed.

*

* Principal: Ed Leadership, Certification, MS Educational Leadership, 3-5 years classroom experience required

* * Establishes and maintains a safe and effective learning environment in the school.

* * Initiates, designs, and implements programs to meet specific needs of the school.

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- * * Assists in the management of the school budget.
- * * Enforces district and corporate policies and procedures.
- * * Maintains active relationships with parents and students.
- * * Budgets school time to provide for efficient conduct of school instruction and business.
- * * Schedules classes within established guidelines to meet student needs.
- * * Meets and instructs assigned classes in the locations and at the times designated.
- * * Plans a program of study that, as much as possible, meets the individual needs, interests and abilities of the students.
- * * Creates a classroom environment that is conducive to learning and appropriate to the maturity of the students.
- * * Prepares classes for the classes assigned and shows written evidence of preparation upon request.
- * * Encourages students to set and maintain standards of classroom behavior.
- * * Guides the learning process toward the achievement of curriculum goals and in harmony with the goals, establishes clear objectives for all lessons, units and projects to communicate these objectives to students.
- * * Employs a variety of instructional techniques and instructional media, consistent with physical limitations of the location provided and the needs and capabilities of the students involved.
- * * Strives to implement by instruction and action the schools philosophy of education and instructional goals and objectives.

*
* Assistant Principal: Bachelors in Education, Certificate/Licensure and a minimum of 3 years classroom instruction required

- * * Act as Administrator in charge in absence of Principal
- * * Serve as LEA as needed in EC/ELL/AIG/MTSS meetings
- * * Share with the principal the responsibility for protecting the health and welfare of students.
- * * Oversees all matters of student attendance and compliance
- * * Resolves all discipline problems in a fair and just manner and maintains records of any discipline action taken.
- * * Assists in administering practices dealing with campus control and security.
- * * Serves on the MTSS team; Assists with grade level data chats and updates data walls/boards and identifies areas of need
- * * Has a general supervisory responsibility for student activities, athletic events, programs of student orientation, and similar activities during school hours.
- * * Assists in assigning faculty to supervision of co-curricular activities.
- * * Meets with department heads and/or leadership team to insure compliance with standards
- * * Works with the test coordinator in the administration of achievement tests
- * * Works closely with Principal/Guidance Counselor and Testing Coordinator on master schedule

*
EC (AIG/ELL) Facilitator: MS in Exceptional Student Education, ELL/AIG endorsement, Staffing/IEP experience required

- * * Supervise EC teachers, Classroom Teachers of EC students, contracted vendors and EC students
- * * Coordinate Testing and Evaluations
- * * Maintain compliance in all IEP cum folders and online platform

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- * *Ensure compliance with all IEP accommodations
- * * Attend and facilitate all EC/Staffing/Evaluations/MTSS meetings
- * * Submission/ maintenance of EC Grant

Teachers: Bachelor of Arts/Science in Education or field of instruction, Certification/license)

- * Meets and instructs assigned classes in the locations and at the times designated.
- * Plans a program of study that, as much as possible, meets the individual needs, interests and abilities of the students.
- * Creates a classroom environment that is conducive to learning and appropriate to the maturity of the students.
- * Prepares classes for the classes assigned and shows written evidence of preparation upon request.
- * Encourages students to set and maintain standards of classroom behavior.
- * Guides the learning process toward the achievement of curriculum goals and in harmony with the goals, establishes clear objectives for all lessons, units and projects to communicates these objectives to students.
- * Employs a variety of instructional techniques and instructional media, consistent with physical limitations of the location provided and the needs and capabilities of the students involved.
- * Strives to implement by instruction and action the schools philosophy of education and instructional goals and objectives.
- * Makes provisions for being available to students and parents for education related purposes outside the instructional day when required or requested to do so under reasonable terms
- * Plans and supervises purposeful assignments for paraprofessionals and volunteers.
- * Strives to maintain and improve professional competence.
- * Attends meetings and serves on staff committees as required.

Staff Evaluation and Professional Development

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

The Principal will work directly with Licensure Director to ensure that all staff are appropriately licensed, have documented professional development opportunities and maintain active NC certification.

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 No Child Left Behind Act of 2001 simplifies the process of identifying and hiring "highly qualified" teachers. Clemmons STEM STEM Academy provides procedural guidelines and support that enhances the likelihood of recruiting highly effective staff. CSA is designed to improve student learning and academic achievement of all students enrolled in the school. The Board understands that in order to promote superior academic achievement, they must build instructional capacity of the staff. The School will implement the NCEES tool for staff evaluations, observations and feedback. The School has developed a Licensure Plan and BT Plan that outlines and meets the required formal and informal evaluation expectations.

* CSA will implement a purposeful BT mentor program for new teachers and provide ongoing support for all staff as they learn a new instructional

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model for delivery and become comfortable with STEM instruction. Initial professional development will be uniform for all staff in the workshop model and STEM integration. Ongoing training and professional development will be individualized, tailored to the specific needs of each teacher based upon student growth data, leadership feedback, and personal reflections in their personal development plans. The professional development provided by The Leader in Me, Project Lead the Way and vendor based training will provide teachers will the CEU's necessary to qualify teachers for NC licenses and re-certification. The School will implement Board approved BT and licensure plans.

*

* All staff will be evaluated through a variety of measures. The school will use the NCEE's and EVAAS program to document mentor programs, PD participation and formal observations as well as to measure student academic growth. The School will also utilize the research based evaluation tools aligned to the educational program of CSA to measure teachers' effectiveness in perspective of the unique educational program.

* At the end of school year, staff will have comprehensive evaluation meetings with leadership to review their performance, student growth, and a value-added component that measures their value to their team, grade level and the school at large. Teachers will have the opportunity for salary raises and bonuses in a merit pay system. All returning staff will participate in some amount of yearly increases which may be tied to state/local allotments, but the highest performing teachers may qualify to receive higher salary increases or bonuses. Stipends will also be paid to teachers who offer their expertise in the extended learning program (ELP) and serve as team leaders, coaches, committee chairs etc.

* The goal for the School Leader to is to recruit, train and retain a premier staff of highly qualified instructors dedicated to the mission of CSA to improve academic performance.

The staffing model represents core, electives and special teachers needed to serve the students and meet the mission of the school

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.

Professional Development is critical to ensure success of the school mission. The Board will provide a variety of professional development opportunities for the instructional staff through our business partnerships, vendors and staff experts. Professional development will be conducted both internally and externally in effort to support the educational program. The school based principal will be responsible for overseeing professional development activities. A professional development calendar will be created every year, prior to the student start date, to provide teachers/staff with initial, ongoing, and follow up trainings pertinent to their jobs. The core components of professional development include the STEM initiative, vendor curriculum materials, reading strategies and pedagogy, content area instructional strategies, assessment and data interpretation.

Differentiated professional development will be offered. For example, whole staff, grade-level, and individual as determined by the School leadership and staff surveys to identify needs and interests in specific areas. Content specific training will be provided as needed with an instructional coach

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and/or instructional leadership as appropriate based on survey feedback, leadership observation, and/or teacher requests.

Training in relation to purchased curriculum materials from vendors: For example, Reading Wonders series, Project Lead the Way, STC science, Go Math!, etc. with concentrated PD for PLTW and LIM.

Internal professional development will take place during pre- planning, scheduled staff meetings, scheduled grade level meetings, content area/vertical team meetings, individual teacher meetings, and stand-alone trainings as needed. The schedule for this professional development will be determined by the School leadership as needed. Internal trainings will typically consist of an initial training with follow-up teacher support to ensure the fidelity of implementation.

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.*

In the first year, teachers will report 2 weeks prior to school opening. Each year thereafter, teachers will report 5 days prior to school opening. Additional days for team professional development are built into the calendar. Appropriate and relevant school-wide training will occur during preplanning, designated staff meetings, and teacher planning days. All staff will participate in school-initiated and other relevant and necessary workshops for professional development, and a member of the administrative team will coordinate, assist and monitor the staff development process. Each week, different leadership and team meetings will occur which may include prescribed or specific professional development or PLC meetings. Grade level common planning is also built into the master schedule to allow our teachers to work and plan together in a cross- curricular manner each week.

This induction period includes training in the following areas: School safety protocols, policies, procedures, and ethics. This training will be led by School administration.

Days 1-3 internal PD will be provided by School Leadership with regards to expectations for:

- * School mission/vision and culture; expectations;
- * Staff Handbook, BT Plan, Communication, Calendar, Committees, Support, Master Schedule etc
- * MTSS framework and Benchmark Assessments implementation and interpretation

*

* Days 4-7 are designed to provide vendor based PD for the core and supplemental curriculum and protected time for grade level and vertical planning of lessons and units.

*

* The central role of curriculum development and planning including The components of balanced literacy; Comprehension strategies; Assessing and planning for work with individuals and small groups; Read aloud and accountable talk; Writing about reading, project -based learning modules, incorporating design and modeling into STEM education, legos/robotics and engineering. Teachers who attended the Project Lead the Way trainings at

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University in the summer will present to staff and share how the modules and units can be supported in core classes.

* Days 8-10 will be used for intensive Leader in Me Training. Certified trainers will teach the staff about the 7 habits and how to incorporate them into the daily learning as well as how to effectively use them to model and shape behavior. If this program is implemented with fidelity it will cultivate a very positive school climate which in turn positively impacts student achievement.

Ongoing PD will be held on the dates indicated in the School Calendar to support and promote instructional best practices and will be focused on areas of need based upon feedback from Leadership, Teachers and student performance data. Teachers will be encouraged to attend individual PD workshops presented by DPI, the Region/LEA that are aligned to their unique area of need, interest or growth. Teachers will be formally observed utilizing the NCEES/EVAAS program and their PDP will be determined according to those

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.

The Schools operating and instructional calendar are designed to meet the mission of the School. The yearly calendar is drafted at 179 student days which allows for more staff PD and conference days during the year. Staff are expected to work 200 days, (in year 1 only) thus allowing 21 days for PD, conferences and make up dates if needed. The operating calendar is also based on extended days so we have included 1075 hours of instruction into the regular schedule. An ELP (extended learning program) is available for those at-risk students who need assistance with homework/tutoring etc. This is a separate program from the tuition based Aftercare. After year one, teachers will report to work 1 week prior to School for 195 days per year.

Our K-8 model includes a seven-hour day to ensure protected time for intensive ELA to include balanced literacy and ELA, a STEM block, and 30 minutes for MTSS/remediation/acceleration. The calendar also allows for two functions:

Grade level common planning time during specials throughout the year and; Professional Development and Conference days during pre-planning and throughout the year that allow for external PD to provide full day training and planning/implementation. Conference days are included to meet the mission of the School related to parent and student engagement and careful implementation of the standards-based report cards to share student growth and achievement.

The staffing structure we believe to be very effective is securing an experienced, master teacher in each grade level to serve as Team Leader and balancing the staff rosters with experienced and novice teachers to help maintain experience, effective teaching strategies and enthusiasm for an innovative model. Onsite leadership will have experience in STEM instruction and successful leaders from within the PLTW and LIM network will help support new staff in Clemmons.

Both PLTW and LIM have specific training requirements, instructional

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coaching, and certification procedures for staff. Selected staff will attend PLTW training events at selected sites and serve as facilitators on site. Only these specialized teachers can deliver PLTW STEM modules for students. Each year, the School will send additional and new staff to trainings for certification so that we can offer students more options in PLTW curriculum and modules.

LIM will provide onsite and additional training workshops during pre-planning, during the year, and summer institutes to embed the 7 habits, and ensure that we implement the program with fidelity. The LIM will send licensed trainers to provide on site support, coaching and team building events to encourage full school implementation.

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.218.45(a-i) carefully.

Marketing Plan

Marketing to potential students and parents is vital to the survival of a charter school. Provide a plan indicating how the school will market to potential students and parents in order to reasonably reflects the racial/ethnic and demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-218.45(e)).

The Schools Board and staff will make extensive efforts to address people where they meet, work, pray and play in order to communicate the opportunities available at the new school. Special effort will be taken to ensure that marketing, application and registration materials are available in multiple languages. All marketing materials and the Schools website will include the following statement: "Tuition-free public charter school". A large-scale postcard drop will be created and sent out inviting parents to attend parent informational sessions. The postcards will be largely distributed to the 5-8 mile radius in which the School intends to serve in the Southwest corridor of Charlotte-Meck as described with targeted maps included. This area was selected due the fact that this growing population is not currently served by a STEM based charter school in the immediate surrounding areas, and this particular area the only other charter schools comparable to ours in grade span or size are 5-8 miles away. The Steele Creek communities are expected to continue to grow at an escalated pace, and members of the board are tied to this community. The areas targeted for postcards and intensive marketing and recruiting efforts are included in the appendices as target maps. The Board and local community supporters will engage the community through public presentations and partnerships with other local agencies and non-competitive schools. These postcards described have proven to be highly successful in the past. Local Board members, school leadership and invested parents will also work in a grass-roots effort to share printed materials with families and invite them to the open sessions. The promotional plan to publicize the school will be designed to reach the entire community and, accordingly, all racial/ethnic groups within it. The school will implement a community awareness plan that will target all area elementary schools, area communities and homeowner associations. Presentations will include information about charter schools in general and

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specifically about the Schools curriculum focus and the application procedure. Flyers will be developed in multiple languages for distribution at area businesses, community centers, churches, and child care facilities. The School will ensure that there are no "built in" barriers for applications or attendance in the school.

Finally, the School will create and share a variety of social media to inform the community about the new School. Facebook, Twitter, Youtube and Instagram will be utilized in a safe and professional manner to help share invitations to parent information sessions, and provide multiple forms of applications for enrollment. Parents will have the ability and opportunity to apply for a seat online through our application database system, or in person via hard copy. We will publicize the open enrollment periods and the lottery dates and ensure that there is equal opportunity for acceptance. Students will be considered for admission without regard to ethnicity, national origin, gender, or achievement level. Although students will most likely come from the neighboring communities, the promotional plan to be followed in publicizing the school will be designed to reach the entire community and accordingly, all racial/ethnic groups within it. The School will embrace all students, regardless of their racial, cultural, ethnic or religious orientation.

Marketing will begin upon the recommendation for approval and will continue through the application window and lottery. Ongoing presentations and parent sessions as well as a grass roots effort to engage the community will be the most effective means of developing interest and commitments from families.

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 school will implement a community awareness plan that will target all area elementary schools, area communities and homeowner associations. The Steele Creek communities are expected to continue to grow at an escalated pace, and members of the board are tied to this community. The areas targeted for postcards and intensive marketing and recruiting efforts are included in the appendices as target maps. The Board and local community supporters will engage the community through public presentations and partnerships with other local agencies and non-competitive schools. Board members and staff will lead the efforts to cultivate business partnerships and community relations. We will seek to secure sponsorships and support from local business to work with students and support the STEM education. We intend to create strong partnerships with high schools and universities that offer similarly aligned programs and enrich student exposure to College and Career Readiness.

Research suggests that when both school and home share the responsibility for students educational success, social and economic stressors are less apparent. Parental involvement in a child's education process is vital to ensuring that the students are not only being encouraged at school to be successful but that they are also being encouraged at home as well (Bowen, 1999). The School will provide parents with information in a timely manner and will provide resources to stimulate parental participation in their

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children's education. Parents will be encouraged to attend quarterly data chats and student led conferences, as well as student project exhibitions. Parents will also be strongly encouraged to volunteer in STEM based academic projects and activities to support the academic achievement and growth of each student. Parental involvement is critically important in fostering the success of students, so the school will make steadfast efforts to motivate parental participation. Student performance will be reported through quarterly report cards and interim/progress reports both of which will require a parent signature. Students who are failing courses, or failing to make adequate progress will have additional letters of notification for parents to read and sign that acknowledge students identified for Tiers 2 and 3 of MTSS and those who are at-risk for retention. Finally, parents will be invited to attend a number of formal events at the school including curriculum nights which will define and address promotion criteria and grade level expectations as well as data conferences in which student data on district, state and internal benchmarking assessments will be shared by the teachers and the students. Students will play an integral role in their progress by receiving feedback from teachers on tests, quizzes, projects and participation. Individual meetings and conferences will be held to review student performance and assessment data as a part of a holistic approach to using student performance and assessment data to improve instruction and learning. Students in grades 3-8 will be responsible to lead parent conferences to share their data and progress. In the first quarter, teachers will work with students to show them how to read data and to set goals. This information will then be shared with their parents to help facilitate a sense of ownership for their learning, as well as foster open and improved communication skills.

The expectation for students to participate in a variety of academic competitions such as FIRST Robotics teams, VEX Robotics teams, Drone clubs, Coding and other design builds will encourage business partnerships and parent engagement. These events are well attended especially as students place higher and we will share live streaming of the events in regional state and national tournaments.

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.*

Enrollment Timeline:

August 2018 -February 2019: Initial student application period begins.

March 1, 2019: First official lottery. If the number of applicants exceeds capacity, admission lottery will be conducted and Parents will be notified of children's acceptance to the school. Parents will be required to complete a

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letter of acceptance and will be enrolled into the School. If there is greater subscription than there are available seats a waitlist will be generated.

April 1- June 30, 2019: Second registration period begins. If number of applicants exceeds capacity, lottery will be conducted. Parents of students enrolled during second registration period will be notified of their child's acceptance to the school.

Year two (2) and subsequent years:

Recruitment activities will commence at the end of the calendar year. The earlier enrollment period will enhance the effectiveness of the schools marketing and communications efforts and allow students and parents to more carefully weigh their options. Applications period will begin each November.

Lottery Process:

The School will have an open admissions policy as required by statute, unless the number of applicants exceeds capacity. During the initial open enrollment period, all applicants will be added to our database until the First Lottery. On the day of the First Lottery, the database will randomly select students for enrollment based on the number of seats available at each grade level. If the number of applicants is greater than the number of seats available, the remaining students will be placed on a waiting list for the Second or following lotteries. In such case, all applicants shall have an equal chance of being admitted through a random selection process conducted by the Schools accounting firm in conformity with North Carolina's Charter School Legislation. All students in the lottery will be assigned a waiting list number should student seats become available or capacity increases. Any premature vacancies will be filled in the same way described above. If the number of applications falls short of the established capacity, supplemental registration periods may be held for the purpose of reaching student capacity. If the parents' response is negative or if there is no response then the School shall move to the next applicant selected in the lottery until all student vacancies have been filled. If for some reason, student spaces should become available after all names in the applicant pool have been exhausted, then the School will move to accept applicants into a new lottery pool and students on the wait list will participate in future lotteries for seats as available dependent upon grade level etc.

SCHOOL will follow all rules and regulations regarding enrollment priority as specified required by applicable North Carolina law

The following groups will have enrollment priority at School for subsequent school years in the order that follows as space permits in each grade:

1. Children of full time employees and board members (may not exceed 15% of total school population)
2. Siblings of current students (as determined by Charter School law G.S. 115C-238.29F(g)(5a))

Any students applying after the open enrollment period will be placed in their respective grade if there is still space available. Otherwise, they will be placed directly after any wait-listed students from the lottery in the order the application was received.

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Any student may withdraw from our charter school anytime and transfer to another school. The School will be responsible to withdraw child from Powerschool and update the PMR reports. The School will be responsible for forwarding cum files and records as requested by the parent and enrolling school.

Weighted Lottery

Does your school plan to use a weighted lottery?

Yes:

No:

The State Board of Education may approve an applicant's request to utilize a special weighted, or otherwise limited lottery in certain circumstances. If the charter applicant wishes to deviate in any way from the open lottery normally utilized by charter schools, the following requirements must be met:

- 1. In no event may a lottery process illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.*
- 2. A lottery process may not be based upon geographic boundaries, such as zip code or current public school attendance zones.*
- 3. A lottery process that deviates from the standard lottery must be based upon the school's unique mission and must be based upon educationally, psychometrically and legally sound practices, protocol and research.*

If the applicant is requesting to use a weighted, or otherwise limited, lottery, please provide the following:

- 1. A thorough explanation of how the specific mission of the school, as set forth in the application, requires the utilization of the weighted or limited lottery.*
- 2. A thorough description of the processes and procedures the applicant intends to use to effectuate the lottery.*
- 3. The underlying research, pedagogical, educational, psychometric and legal, that supports the request and the procedures the applicant is requesting.*

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PROJECTED ENROLLMENT

2018-19 through 2022-2023

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Winston Salem/Forsyth County Schools

LEA #2 Guilford County Schools

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.

	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	LEA 340	LEA 410	LEA 000	LEA 340	LEA 410	LEA 000	LEA 340	LEA 410	LEA 000	LEA 340	LEA 410	LEA 000	LEA 340	LEA 410	LEA 000
Kindergarten	40	40	0	40	40	0	40	40	0	40	40	0	40	40	0
Grade 01	42	42	0	42	42	0	42	42	0	42	42	0	42	42	0
Grade 02	42	42	0	42	42	0	42	42	0	42	42	0	42	42	0
Grade 03	42	42	0	42	42	0	42	42	0	42	42	0	42	42	0
Grade 04	44	44	0	44	44	0	45	45	0	45	45	0	45	45	0
Grade 05	44	44	0	44	44	0	45	45	0	45	45	0	45	45	0
Grade 06	23	23	0	44	44	0	48	48	0	48	48	0	48	48	0
Grade 07	0	0	0	35	34	0	48	48	0	48	48	0	48	48	0
Grade 08	0	0	0	0	0	0	47	47	0	47	47	0	47	47	0
	277	277		333	332		399	399		399	399		399	399	

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Section IV: Governance and Capacity Concerns and Additional Questions	Reviewer	Page Reference
***A fax number was not provided.	Kebbler Williams	Private Non-
NA	Jessica Kelly	Tax-Exempt S
Please clarify how the board will be evaluated.	Jessica Kelly	Governance a
What are the proposed term limits and turn-over procedures for Board members?	Shannon Stein	Governance a
***What is the reporting structure of the School Advisory Council and the Parent Teacher Organization as it relates to the governing board and school leadership? ***How will the governing board and individual board members be evaluated?	Kebbler Williams	Governance a
The background of the board is very strong. My only concern is the lack of K-8 education experience on the board but this could easily be remedied by the hiring of the strong and experienced head of school.	Steven Walker	Governance a
How will the board be evaluated?	Shannon Sellers	Governance a
NA	Jessica Kelly	Proposed Man
Do you not plan to have an ELL teacher? Are you planning to find a person that is certified in EC, ELL and AIG instead of one person for each area? It will be difficult to find one person that is certified in each of these areas? Your anticipated positions only list EC teacher and your statement at the bottom suggest one person to serve in all 3 roles.	Shannon Sellers	Staffing Pla
The plan states that the school will recruit "instructional experts with competitive pay", but isn't the budgeted amount for teachers in-line with inexperienced local teacher pay?	Shannon Stein	Staffing Pla
What issues can staff grieve?		
No ELL teacher listed; who will provide services to these students?	Jessica Kelly	Staffing Pla
***The projected staff does not include an ELL resource teacher or a Gifted Services Provider as noted earlier in the application. ***What are the board's procedures for hiring and dismissing staff? ***If the grievance is with the principal, and the letter of grievance is submitted to the chair or vice chair of the board as indicated in the policy, how do the steps change? ***What qualifications must teacher assistants have to be hired? What are their expected roles and responsibilities? ***What qualifications must the office staff and business manager have to be hired? What are their expected roles and responsibilities? ***What qualifications must the registrar, maintenance/cafeteria staff, technology staff, nurse/health officer, guidance staff, after school coordinator, and bus drivers have to be hired? What are their expected roles and responsibilities? ***Is the board expecting to find one person certified to work with EC, ELL, and AIG students or is the board planning to hire one individual certified to work with EC, one individual certified to work with ELL, and one individual certified to work with AIG?	Kebbler Williams	Staffing Pla
There is an impressive list of PD opportunities that will be offered in year #1, however does the budget adequately account for the cost of vendor training?	Shannon Stein	Staff Evalua
Have you allotted enough money in your budget to cover the rigorous professional development?	Shannon Sellers	Staff Evalua
***Who will serve as the Licensure Director? ***Provide more details about the Extended Learning Program. ***How will professional development be delivered after the school year begins? How many days/hours will be dedicated to professional development for teachers?	Kebbler Williams	Staff Evalua
Is the extensive list of professional development incorporated into the budget? What continuous professional development will need to occur?	Jessica Kelly	Staff Evalua
***This marketing plan is not for this school; it is for a school in Charlotte.	Kebbler Williams	Marketing Pl
What is the timeframe for when the marketing plan will be implemented? Are there contingency plans to accelerate or shift resources if initial success is not as anticipated?	Amy Ruck Kagan	Marketing Pl
***This parent and community involvement plan is not for this school; it is for a school in Charlotte.	Kebbler Williams	Parent and C
Is this plan taken from another school?	Jessica Kelly	Parent and C
Why not just keep enrollment open if the spots are not filled (i.e vs. a second registration period)?	Shannon Stein	Admissions P

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Why are you conducting 2 registration periods? If you have open slots after the first registration period, why not continue to have open enrollment?	Shannon Sellers	Admissions P
***What are the actual dates for the first tentative open enrollment period? ***Why is there a second registration period? How will the school treat the students who are on the wait list from the first lottery/registration period when the second registration period opens?	Kebbler Williams	Admissions P
The applicant is projecting that half of its students will come from Guilford County. Is this a reasonable estimate?	Kebbler Williams	Projected St
Clarification needed on two registration periods.	Jessica Kelly	Weighted Lot

Reviewer	Score
Alan Hawkes	
Alex Quigley	
Amy Ruck Kagan	Pass
Cheryl Turner	Pass
Steven Walker	Pass
Deanna Townsend-Smith	
Jessica Kelly	Pass
Kebbler Williams	Fail
Lynn Kroeger	
Robert McOuat	
Shannon Sellers	Pass
Shannon Stein	Pass

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V. OPERATIONS

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.

Buses will be provided as needed for students who live a reasonable distance from the school, which would be considered as a 1-5 mile radius from the geographic center of the physical location of the school. Transportation costs are reflected in the school budget. Bus routes will consist of depot stops strategically placed at safe locations where students enrolled at the school are concentrated. Admission to the school, however, is not predicated upon residence. Therefore, any child eligible to enroll in a public North Carolina School may enroll at the charter school. For families who enroll into the school who do not qualify for bus transportation, parents may provide transportation to the school on a daily basis. Carpooling will be facilitated via online signups accessible through the schools website. The school will also contract with approved vendors for field trips, local competitions and athletic events as needed and also as articulated in the school budget. Bus Transportation is a major unknown variable with new charter school operations due to the lack of conventional zoning or districting. The budget includes a substantial contingency fund which will account for the costs of providing bus transportation as described in the application. The budget contains a separate line item for gasoline to account for other aspects of school transportation, such as field trips and athletics. The stop locations will be within an approximate 1-4 mile radius to allow for depot type stops to be utilized by the school and students, while also allowing for reasonable transit times for students to be on the bus itself. Bus seats are offered on a first come, first served basis, and carpooling will also be encouraged through a student directory and bulletin board system. Several successful charter schools in the state employ these practices successfully within their programs. If eligible, the school will apply for a grant under NCGS 115C-218.106.

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.

The program is designed to outsource a fully functional NSLP compliant program to a vendor at a cost neutral basis to the school. The program will undergo a state-approved RFP process and meet all criteria to operate under DPI/NSLP guidelines in order to serve reimbursable meals. The school will contract with a food service vendor for breakfast and lunch. The vendor will provide equipment including warming ovens, hand wash sinks, triple sinks(for equipment & utensil washing), and refrigeration to store food once it has been delivered to the school. All food handlers will be required to complete Food Handling Training as mandated by the Department of Health. Student meal counts and records of student participation in the National School Lunch Program will be maintained at the school. The Governing Board will require the vendor to supply a monthly menu meeting the requirements of

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the National School Lunch Program. These menus will be published monthly and presented to parents and students. The meal provider will be required to submit evidence of proper meal balance and portion size for the students served. The vendor will ensure that the point of sale system accurately provides a count of reimbursable meals by category (free, reduced price, full pay) served to students. These counts will be taken at point of meal service and only meals that meet pattern requirements will be claimed for reimbursement. The School will adopt the sanitation and reporting requirements prescribed by the health dept. The health dept will be notified of the schools intent to provide food service to students. The School will obtain an application for an operating permit, maintain that licensure and the School will post the results of health and food inspections on its website. The school will follow all required procedures when distributing and processing F/R Meal Applications. This is the process that several charter schools follow to deliver breakfast and lunch programs under NSLP.

Civil Liability and Insurance (GS 115C-218.20):

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	\$3,000,000		\$2,800.00
Officers and Directors/Errors and Omissions	\$2,000,000		\$2,100.00
Property Insurance	\$4,000,000		\$4,000.00
Motor Vehicle Liability	\$1,000,000		\$350.00
Bonding Minimum/Maximum Amount	\$1	\$250,000	\$450.00
Other	\$5,000,000		\$10,650.00
Total Cost			\$20,350.00

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

Health and Safety Requirements:

All public charter schools are required to follow the regulations regarding health and safety as stated in § 115C218.75.

We, the Board members at (Charter School Name) will develop a written safety plan and policies to be shared with staff, parents and students and be available upon inspection from the Department of Public Instruction and local Health Departments.

Facility:

Note that the SBE may approve a charter school prior to the school's obtaining a facility; however, students may not attend school and no funds will be allocated until the school has obtained a valid Certificate of Occupancy for Educational use to the Office of Charter Schools.

What is your plan to obtain a building? Identify the steps that the board will take to acquire a facility and obtain the Educational Certificate of Occupancy.

The Board is already in final negotiations with a private real estate developer who will secure the land, construct the school facility, and will then lease the facility to Clemmons STEM Academy. Before the school begins operations, DPI will be provided with documentation of ownership or lease of the facility and certification that the building satisfies all occupancy requirements. The facility layout will be decided upon through a collaborative effort of the Board and the developer, and will include a design based on current research on safe schools, adequate classroom and office space, appropriate outdoor recreational areas, designated pick-up and drop-off zones, and parking for staff and visitors. The Board will work closely with the developer to ensure a timely completion of the facility. In the event the charter application is approved, the school will issue an RFP for construction. Once the charter is awarded, the school will vigorously pursue a permanent facility as described above. Funding for a permanent facility has already been secured and is referenced in Appendix M.

What is the breakdown of cost per square foot for the proposed facility? Outline how this cost is comparable to the commercial and educational spaces for the proposed school location.

The budget provided includes a projected \$500k+ lease payment for the facility to demonstrate the viability of the school, which targets a current commercial lease market rate of approximately 14 dollars per sqft, or approx \$125 per sqft to construct

Facility Contingency Plan: *Describe the method of finding a facility if the one the board has identified will not be ready by the time the public charter school will be opening. Include information regarding the immediate spatial needs of the school and identify any programs that will not be immediately offered because a permanent facility has yet to open.*

The Board will carefully monitor the construction progress schedule and will receive weekly updates from the developer as to the progress of the facility. However, should the construction progress not be sufficient to guarantee delivery of the school facility by the beginning of the school year, a contingency plan has been established and will activate approximately six months prior to the initial opening of school. The school has received offers from both Mobile Modular and ModSpace to construct a school facility in the event that the primary facility is not ready for school opening. The focus of the Board will shift to the development of a site which will suit the schools needs for a 1-3 year span, utilizing modular classroom space. Approximately five modular units of eight

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classrooms each would be required to open the school according to the initial years K-6 plan. Additional units may be added should the school choose to remain at the alternate site for the following school year. Local churches and other similar organizations have been contacted to open dialogue in the event a contingent location is needed. It is expected that no programs will be delayed should an alternate facility be used, and the school will encumber no lease payments or otherwise incur any debts for the primary facility until such time as the primary facility is ready for school use. The Board at that time will negotiate a transition plan in the academic and financial best interests of the school.

Section V: Operations Concerns and Additional Questions	Reviewer	Page Reference
What will you do if a student needs to ride a bus, but the bus is full based on your "first come first serve" policy for buses? This could be a potential issue for students.	Shannon Sellers	Transportati
***How does this plan support the applicant's goal to mirror the enrollment of Winston-Salem/Forsyth County Schools at 40.2 percent White, 28.5 percent African-American, 24.5 percent Hispanic, 4.0 percent Multiracial, 2.5 percent Asian, and less than 1 percent American Indian or Native Hawaiian/Pacific Islander? ***In one place, the applicant says that it will provide transportation for students living in a 1-5 mile radius of the school. In another place, the applicant says that bus depot stops will be offered within a 1-4 mile radius. Which is correct? What if students who desire to attend the school need bus transportation and live outside the 5-mile radius?	Kebbler Williams	Transportati
Will the school own the buses or outsource the operation?	Shannon Stein	Transportati
How will students that live outside the radius have transportation? What constitutes if a student qualifies for bus transportation?	Jessica Kelly	Transportati
Bus transportation will be used.	Steven Walker	Transportati
Outsourcing and using NSLP.	Steven Walker	School Lunch
Where would the modular units go if needed as a contingency?	Shannon Stein	Facility and
What are the timeframes that the school will monitor to determine progress and viability of the real estate transaction? Closing date, lease date, TCO date, CO date, etc?	Amy Ruck Kagan	Facility and
***How does the cost per square foot compare to other educational spaces in Forsyth County? ***What is the expected square footage of the facility?	Kebbler Williams	Facility and
If the plans do not go through is there alternate plans being seeked out for a location for the school?	Jessica Kelly	Facility and

Reviewer	Score
Alan Hawkes	
Alex Quigley	
Shannon Stein	Pass
Shannon Sellers	Pass
Robert McQuat	
Lynn Kroeger	
Kebbler Williams	Pass
Jessica Kelly	Pass
Deanna Townsend-Smith	
Steven Walker	Pass
Cheryl Turner	Pass
Amy Ruck Kagan	Pass

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VI. 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 2018-19

<p>SHOW CALCULATIONS FOR FIGURING STATE AND LOCAL DOLLARS FOR THE PROPOSED CHARTER SCHOOL</p> <p><i>Refer to the <u>Resource Manual Finance Section</u> for guidance on estimated funding amounts</i></p>	<p>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.</p> <ul style="list-style-type: none"> In year 1 – Base state allotments are determined by the LEA in which <u>the student</u> resides In year 2 and beyond- Base State allotments are determined by the LEA in which <u>the school</u> is located. <p>Local Funds: Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.</p> <p>Federal Funds: Charter schools must qualify and apply for the individual federal grants based on their population of students.</p> <p>REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS</p>																							
	<p>LEA #1 340 - Winston Salem/Forsyth County Schools</p>																							
	<table border="1"> <thead> <tr> <th>Revenue</th> <th>2016-2017 Per Pupil Funding</th> <th>Projected LEA ADM</th> <th>Approximate funding for 2018-2019</th> </tr> </thead> <tbody> <tr> <td>State Funds</td> <td>\$5,161.82</td> <td>277</td> <td>\$1,429,824.14</td> </tr> <tr> <td>Local Funds</td> <td>\$2,025.00</td> <td>277</td> <td>\$560,925.00</td> </tr> <tr> <td>Federal EC Funds</td> <td>\$4,253.55</td> <td>28</td> <td>\$119,099.40</td> </tr> <tr> <td>Totals</td> <td></td> <td></td> <td>\$2,109,848.54</td> </tr> </tbody> </table>	Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019	State Funds	\$5,161.82	277	\$1,429,824.14	Local Funds	\$2,025.00	277	\$560,925.00	Federal EC Funds	\$4,253.55	28	\$119,099.40	Totals			\$2,109,848.54			
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	<p>LEA #2 410 - Guilford County Schools</p>																							
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Total Budget: Revenue Projections 2018-19 through 2022-2023

INCOME: REVENUE PROJECTIONS	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
-State ADM Funds	\$2,848,992	\$3,432,610	\$4,119,132	\$4,119,132	\$4,119,132
-Local Per Pupil Funds	\$1,232,650	\$1,535,500	\$1,845,375	\$1,845,375	\$1,845,375
-Exceptional Children Federal Funds	\$231,722	\$282,861	\$339,433	\$339,433	\$339,433
-Other Funds*	\$177,885	\$202,716	\$222,759	\$222,759	\$222,759
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$4,491,249	\$5,453,687	\$6,526,699	\$6,526,699	\$6,526,699

***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 J.

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Personnel Budget: Expenditure Projections 2018-19 through 2022-2023

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.

BUDGET EXPENDITURE PROJECTIONS Personnel	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	<i>Num Staff</i>	<i>Avg Salary</i>	<i>Total salary</i>	<i>FTE</i>	<i>Avg Salary</i>	<i>Total salary</i>	<i>FTE</i>	<i>Avg Salary</i>	<i>Total salary</i>	<i>FTE</i>	<i>Avg Salary</i>	<i>Total salary</i>	<i>FTE</i>	<i>Avg Salary</i>	<i>Total salary</i>
Administrative & Support Personnel:															
Lead Administrator	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000
Assistant Administrator	1	\$54,000	\$54,000	2	\$54,000	\$108,000	2	\$54,000	\$108,000	2	\$54,000	\$108,000	2	\$54,000	\$108,000
Finance Officer	1	\$40,800	\$40,800	1	\$40,800	\$40,800	1	\$40,800	\$40,800	1	\$40,800	\$40,800	1	\$40,800	\$40,800
Clerical	3	\$32,000	\$96,000	3	\$32,000	\$96,000	3	\$32,000	\$96,000	3	\$32,000	\$96,000	3	\$32,000	\$96,000
Food Service Staff	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Custodians	2	\$30,600	\$61,200	2	\$30,600	\$61,200	3	\$30,600	\$91,800	3	\$30,600	\$91,800	3	\$30,600	\$91,800
Transportation Staff	3	\$13,000	\$39,000	3	\$13,000	\$39,000	4	\$13,000	\$52,000	4	\$13,000	\$52,000	4	\$13,000	\$52,000
A - Total Admin and Support:	11		\$371,000	12		\$425,000	14		\$468,600	14		\$468,600	14		\$468,600
Instructional Personnel:															
Core Content Teacher(s)	27	\$40,000	\$1,080,000	31	\$40,000	\$1,240,000	36	\$40,000	\$1,440,000	36	\$40,000	\$1,440,000	36	\$40,000	\$1,440,000
Electives/Specialty Teacher(s)	6	\$40,000	\$240,000	8	\$40,000	\$320,000	9	\$40,000	\$360,000	9	\$40,000	\$360,000	9	\$40,000	\$360,000
Exceptional Children Teacher(s)	3	\$44,000	\$132,000	4	\$44,000	\$176,000	5	\$44,000	\$220,000	5	\$44,000	\$220,000	5	\$44,000	\$220,000
Instructional Support	2	\$43,000	\$86,000	2	\$43,000	\$86,000	3	\$43,000	\$129,000	3	\$43,000	\$129,000	3	\$43,000	\$129,000
Teacher Assistants	6	\$20,000	\$120,000	7	\$20,000	\$140,000	9	\$20,000	\$180,000	9	\$20,000	\$180,000	9	\$20,000	\$180,000
B - Total Instructional	44		\$1,658,000	52		\$1,962,000	62		\$2,329,000	62		\$2,329,000	62		\$2,329,000

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Personnel:															
A+B = C - Total Admin, Support and Instructional Personnel:	55		\$2,029,000	64		\$2,387,000	76		\$2,797,600	76		\$2,797,600	76		\$2,797,600
Administrative & Support Benefits															
Health Insurance	8	\$5,000	\$40,000	9	\$5,000	\$45,000	10	\$5,000	\$50,000	10	\$5,000	\$50,000	10	\$5,000	\$50,000
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Retirement Plan--Other	4	\$1,105	\$4,420	4.5	\$1,105	\$4,973	5	\$1,105	\$5,525	5	\$1,105	\$5,525	5	\$1,105	\$5,525
Life Insurance	8	\$15	\$120	9	\$15	\$135	10	\$15	\$150	10	\$15	\$150	10	\$15	\$150
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	11	\$600	\$6,600	12	\$600	\$7,200	14	\$600	\$8,400	14	\$600	\$8,400	14	\$600	\$8,400
Social Security	11	\$2,500	\$27,500	12	\$2,500	\$30,000	14	\$2,500	\$35,000	14	\$2,500	\$35,000	14	\$2,500	\$35,000
Unemployment	11	\$225	\$2,475	12	\$225	\$2,700	14	\$225	\$3,150	14	\$225	\$3,150	14	\$225	\$3,150
D - Total Admin and Support Benefits:	53		\$81,115	58.5		\$90,008	67		\$102,225	67		\$102,225	67		\$102,225
Instructional Personnel Benefits:															
Health Insurance	44	\$5,000	\$220,000	52	\$5,000	\$260,000	62	\$5,000	\$310,000	62	\$5,000	\$310,000	62	\$5,000	\$310,000
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Retirement Plan--Other	22	\$1,105	\$24,310	26	\$1,105	\$28,730	31	\$1,105	\$34,255	31	\$1,105	\$34,255	31	\$1,105	\$34,255
Social Security	44	\$2,500	\$110,000	52	\$2,500	\$130,000	62	\$2,500	\$155,000	62	\$2,500	\$155,000	62	\$2,500	\$155,000
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	44	\$600	\$26,400	52	\$600	\$31,200	62	\$600	\$37,200	62	\$600	\$37,200	62	\$600	\$37,200
Life Insurance	44	\$15	\$660	52	\$15	\$780	62	\$15	\$930	62	\$15	\$930	62	\$15	\$930
Unemployment	44	\$225	\$9,900	52	\$225	\$11,700	62	\$225	\$13,950	62	\$225	\$13,950	62	\$225	\$13,950
E - Total Instructional Personnel Benefits:	242		\$391,270	286		\$462,410	341		\$551,335	341		\$551,335	341		\$551,335
D+E = F - Total Personnel Benefits	295		\$472,385	344.5		\$552,418	408		\$653,560	408		\$653,560	408		\$653,560

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A+D = G - Total Admin and Support Personnel (Salary & Benefits)	64		\$452,115	70.5		\$515,008	81		\$570,825	81		\$570,825	81		\$570,825
B+E = H - Total Instructional Personnel (Salary & Benefits)	286		\$2,049,270	338		\$2,424,410	403		\$2,880,335	403		\$2,880,335	403		\$2,880,335
G+H = J - TOTAL PERSONNEL	350		\$2,501,385	408.5		\$2,939,418	484		\$3,451,160	484		\$3,451,160	484		\$3,451,160

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Operations Budget: Expenditure Projections
2018-19 through 2022-2023

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
	Administrative & Support:					
Office:	Office Supplies	\$18,000	\$20,000	\$22,000	\$22,000	\$22,000
	Communications & Telephone	\$10,000	\$12,000	\$13,000	\$13,000	\$13,000
	Copier leases	\$20,000	\$25,000	\$35,000	\$35,000	\$35,000
Professional Contract	Legal Counsel	\$10,000	\$12,000	\$14,000	\$14,000	\$14,000
	Financial	\$34,902	\$40,466	\$47,376	\$47,376	\$47,376
Facilities	Facility Lease/Mortgage	\$500,000	\$700,000	\$950,000	\$1,050,000	\$1,150,000
	Maintenance	\$6,050	\$6,900	\$7,000	\$7,000	\$7,000
	Custodial Supplies	\$10,000	\$11,500	\$11,500	\$11,500	\$11,500
	Custodial Contract	\$38,000	\$46,000	\$46,000	\$46,000	\$46,000
	Insurance (pg19)	\$20,350	\$28,950	\$34,250	\$34,250	\$34,250
Utilities	Electric	\$45,000	\$52,000	\$54,000	\$54,000	\$54,000
	Water/Sewer	\$30,000	\$38,000	\$45,000	\$45,000	\$45,000
	Trash	\$6,500	\$7,500	\$7,500	\$7,500	\$7,500
Transportation	Buses	\$30,500	\$30,500	\$45,600	\$45,600	\$45,600
	Gas	\$12,000	\$12,000	\$18,000	\$18,000	\$18,000
	Oil/Tires & Maintenance	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000
Other	Marketing	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000
	Travel	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Facilities	Debt Service	\$35,000	\$35,000	\$35,000	\$35,000	\$35,000
	Athletic/Event Rent	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	Building Supplies And Materials	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	General Contracts	\$60,000	\$80,000	\$100,000	\$100,000	\$100,000
	Misc. Contracts	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	Security Monitoring	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
Office:	Non-Cap Office Hardware	\$2,000	\$3,000	\$3,000	\$3,000	\$3,000
Other	Equipment And Furniture	\$10,000	\$12,000	\$15,000	\$15,000	\$15,000
Professional Contract	Audit Fees	\$10,500	\$10,500	\$10,750	\$10,750	\$10,750
	Bank Fees	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000
	General Administration	\$3,000	\$5,000	\$5,000	\$5,000	\$5,000
	Sis Services	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Technology Support Services	\$5,000	\$6,500	\$7,000	\$7,000	\$7,000
	Hr Support Services	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000

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Office:	Misc. Expenses	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	K - TOTAL Administrative & Support Operations	\$996,802	\$1,274,816	\$1,605,976	\$1,705,976	\$1,805,976
	Instructional:					
Classroom Technology	Computers	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
	Software	\$22,000	\$24,000	\$26,000	\$26,000	\$26,000
Instructional Contract	Staff Development	\$14,000	\$16,000	\$16,000	\$16,000	\$16,000
Books and Supplies	Instructional Materials	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
	Curriculum/Texts	\$75,000	\$75,000	\$20,000	\$20,000	\$20,000
Books And Supplies	Library Books	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
	Ec Supplies	\$8,000	\$8,000	\$5,000	\$5,000	\$5,000
	Health Supplies	\$750	\$750	\$1,000	\$1,000	\$1,000
	Safety Supplies	\$3,500	\$1,000	\$1,000	\$1,000	\$1,000
	Athletic Supplies	\$13,000	\$15,000	\$15,000	\$15,000	\$15,000
	Postage	\$2,000	\$2,000	\$3,000	\$3,000	\$3,000
	Memberships	\$4,000	\$4,600	\$4,600	\$4,600	\$4,600
Classroom Technology	Internet Services	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Non-Cap Hardware	\$10,000	\$14,000	\$14,000	\$14,000	\$14,000
	Technology Supplies	\$4,000	\$7,000	\$7,000	\$7,000	\$7,000
Office:	Capital Instructional Equipment And Furniture	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000
Classroom Technology	Instructional Technology And Equipment Lease	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Instructional Contract	Instructional Services	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Ec Services (Psych, Speech, Ot)	\$60,000	\$65,000	\$80,000	\$80,000	\$80,000
	Athletic Services	\$10,000	\$10,000	\$12,000	\$12,000	\$12,000
Professional Contract	Tuition And Fees	\$1,000	\$5,000	\$7,000	\$7,000	\$7,000
Instructional Contract	Substitute Teachers	\$16,000	\$21,000	\$38,000	\$38,000	\$38,000
	L - TOTAL Instructional Operations	\$673,250	\$698,350	\$679,600	\$679,600	\$679,600
	K+L = M - TOTAL OPERATIONS	\$1,670,052	\$1,973,166	\$2,285,576	\$2,385,576	\$2,485,576

Clemmons STEM Academy - CSA will provide a safe and nurturing learning environment for student development and growth. The Schools students will be prepared to be responsible, caring and productive members of an ever changing, global society.

Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
J - TOTAL PERSONNEL	\$2,501,385	\$2,939,418	\$3,451,160	\$3,451,160	\$3,451,160
M - TOTAL OPERATIONS	\$1,670,052	\$1,973,166	\$2,285,576	\$2,385,576	\$2,485,576
J+ M =N TOTAL EXPENDITURES	\$4,171,437	\$4,912,584	\$5,736,736	\$5,836,736	\$5,936,736
Z - TOTAL REVENUE	\$4,491,249	\$5,453,687	\$6,526,699	\$6,526,699	\$6,526,699
Z - N = SURPLUS / (DEFICIT)	\$319,812	\$541,104	\$789,963	\$689,963	\$589,963

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.

Enrollment of the school is based on a customary matriculation pattern of four classes per grade level K-6. The school will add grade levels and welcome new kindergarten classes in successive years until the school is at its full capacity of 796 students. The NC state average enrollment in elementary schools is 500. Almost all of the elementary schools in Clemmons have well over 800 students enrolled. The NC state average for middle school enrollment is 668. The student to teacher ratio in Charlotte for public schools is 16:1, which is 8.3% greater than the North Carolina state student to teacher ratio. According to the demographics posted on the district websites, the school districts has grown about three to five percent each year. This equates to about 3000 students per year. It is anticipated that growth will continue for at least the next ten years. There are hundreds of students currently in overcrowded classrooms and schools that would consider membership in our charter school for the facility alone and charter school membership (assignment) is not impacted by zoning issues. Furthermore, the proposed Clemmons STEM Academy will offer a unique STEM program for all students K-8 that is specifically designed to offer students the opportunity to become proficient in the areas of STEM.

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

The Board has pre-identified approximately three hundred thousand dollars in salary and benefits for non core instructional and related staff (or 17% of projected staffing costs), and three hundred thousand dollars in non-staffing related expenses (or 20% of projected non-staff related school expenses) that can be immediately reduced should enrollment not meet expectations, for a total of reduction to 70% of the original projected budget, or 431 student equivalent revenue. This enrollment would further reduce the core instructional teacher requirement by eight, reducing the actual revenue needed to break even by an additional three hundred twenty thousand dollars, for an overall composite reduction to 60% of anticipated projected revenue, or the equivalent of approximately 360 students needed to break even. Break Even continued below.

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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

Not Applicable. The schools budget is built to sustain itself solely on the accumulated per-pupil funding from federal, state and county sources. Any fundraising, grants or donation that the school receives will serve to enrich the existing program and assist the school in achieving its programmatic and financial goals sooner than forecast. The budget as submitted in the appendix also includes a customary aftercare component that provides slight net revenue to the school. The budget includes a total of \$400k+ annually for any and all FFET(Furniture, Fixtures, Equipment and Technology) and instructional materials needed to operate the school, spread across various expense GLs to simulate the probability that the school will combine leases and outright purchases of furniture, IT, textbooks, and other materials for instructional use (such as copy paper). Amortized lease rates allow for the school to develop a year 1 implementation of approximately \$1.25MM in purchasing power, and service this debt without compromising other aspects of the budget. This is customarily how year 1 successful charter schools open, where the various instructional and related items are available for students and staff on day one, and amortized over a 3-5 year span.

The five year budget proforma is purposefully built to provide an accurate, yet fundamentally conservative financial basis, ensuing that the school is sustainable over the long term. Three important aspects of the budget which protect the school against unforeseen negative revenue scenarios are: the 5-7% positive fund balance projection built into the 5 year proforma, all source revenue projections are flat (no annual percentage increase) in the first five years of the school, and the budget does not rely on any outside sources of funds such as grants, fundraising or donations to operate. Additionally, large capital purchases initially budgeted in years one through three could be amortized via long term leases which would free up operating cash during the schools initial opening phase.

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

K-3 20:1, 4-5 21:1, 6-8 22:1 average per classroom

- 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.*

The board intends to contract with LBAH for comprehensive financial and relates services support, including: preparation of financial reports each month, preparation of vendor payments , reconciliation of bank accounts, preparation of payroll (including payroll deductions and withholdings), preparation and submission of state and federal payroll taxes and associated reports, preparation and transmission of state and federal reporting in accordance with the Uniform Education Reporting System, provide financial, budget and other reports and data independent auditor to plan and conduct annual audit, and confer with staff and board as necessary at reasonable intervals and provide consulting relating to accounting and financial matters. The board may elect to contract with other independent entities or

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vendors should the school staff require additional assistance in areas necessary to operate the school, or otherwise not be able to provide a specific service through in house staff. Examples of this would include contracting with a licensed vendor for speech and occupational therapy services, should the school not be able to hire qualified candidates, or should the EC service requirement be such that contracting with an outside vendor at an hourly rate would be in the best financial interests of the school versus hiring employees directly. In instances where the board will contract for services with an outside vendor, there will be strict criteria and a robust selection process to ensure that the contracted services are performed appropriately and school funds are expended in the best interest of students. Minimally, potential vendors will be licensed in their respective fields, insured or otherwise bonded, and undergo background checks which mirror the school and the local LEA. The Board or a school leadership designee will research available vendors and independently obtain data (such as a client list for reference checks) to gauge the quality of potential vendors. The Board will vote to contract with specific vendors based on this criteria, and such contracts will be subject to periodic review for efficacy. When appropriate, the board will enact a full Request for Proposal (RFP) process and adjust to fit the individual need as articulated by the board and allowable under state law.

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

The budget as presented, including salaries for administrators, teachers and other school staff reflected in the charter application are averages that were calculated directly from published financial audits from similarly sized charter schools currently operating in North Carolina counties with similar per-pupil county funding amounts, since 2010. The substantial contingency and positive fund balance were thoughtfully constructed to account for those unforeseen or unknowable variables that naturally accompany a new charter school start up, and to guarantee that the school has the fiscal capacity and agility to address those needs. Primary spending priorities are on expenses directly related to student instruction and a conducive learning environment. This would include: salaries and benefits of instructional and support staff, instructional materials and supplies, contracted services for educational support, insurance, facility costs and related costs necessary to provide a safe and healthy learning environment for students. Secondary spending priorities are for those non-essential but beneficial expenses to improve student learning. These costs are usually incurred as the School reaches its targeted student capacity. This would include: additional enrichment, auxiliary supplemental instructional materials, intramural uniforms, etc. The school will contract with an outside food service vendor who is pre-approved to process Free and Reduced Lunch applications and serve within the guidelines of the National School Lunch Program. It is anticipated that the costs associated with this program will be cost neutral. School staff is sufficient in number to assist and otherwise facilitate the breakfast and lunch service if necessary. The school will allocate funds as necessary to comply with state law regarding charter school students and transportation to and from school. The acquisition and operation of additional school buses to transport students to and from school, within a reasonable radius of the school will be the first use of surplus funds beyond the anticipated fund balance.

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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 Board has set an anticipated goal of approximately 2-8% percent of annual expenditures to develop the schools unrestricted fund balance. After year one, at no point will the fund balance decrease below 2% of the schools annual approved budget, or one full months worth of operating expenses, whichever is the greater amount. Cash flow will be monitored to ensure that the school's cash balance remains at or above 2% until such time within the first year of operation that the board can accurately predict all financial obligations will be met through the end of the fiscal year. Developing and maintain a healthy fund balance will be a primary component of the schools budgeting process. The systematic budgetary review process conducted by the Board and school leadership consists of four main budgeting periods: Early Bird (June of preceding fiscal year), Post ADM (September), Spring(February) and Final (July of following fiscal year). This schedule of compulsory budget review will ensure a balance between revenue and expenses, and empowers the Board and school leadership with the agility needed to quickly adjust the budget. This practice when combined with monthly review of financial Budget versus Actual statements prepared by the schools financial accountant, local comptroller and school principal will allow the school to thoughtfully and methodically develop an appropriate unrestricted fund balance.

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

Based upon current discussions with real estate developers, the estimate that the per square foot lease cost of the completed facility will be approximately \$14 per square foot, which will result in an annual lease estimate in the half-million dollar range and escalating after year 1. The rate variation is due variation to the actual size of the facility and whether the school leases an existing facility (\$10-\$12/square foot per year) or builds a new facility (\$12-\$14/square foot per year). These costs are consistent with leases that have recently been executed in the area. These costs are also consistent with our information on current land costs and construction costs. From our research and discussions with commercial real estate brokers, general contractors and real estate developers, we estimate the total cost of a new facility would be between \$8 million and \$10 million depending on the location and size of the facility. This would translate into posted estimated annual lease costs assuming a typical lease CAP rate of 7% to 9%. The Board has already received a funding commitment from a nationally recognized and reputable investor who specializes in commercial real estate to construct and lease back the facility to the school as described above. The Board has already received a funding commitment for all furniture, fixtures and equipment necessary to open and operate the school from an internationally reputable company who specializes in equipping new schools and specifically charter schools. The funding commitment is for approximately \$1,300,000, and is evenly split into monthly payments beginning September after the school opens and spans over 42 months at an 8% annual interest rate. School bus financing will be facilitated by the Carolina Thomas Bus company via their Daimler-Chrysler/Mercedes financing arm. Current finance rates are 5.6% for a 7 year term on 72 passenger-rated school buses, and payments are reflected in the budget. As

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the school may discharge funds in support of the school opening, the Board has opened negotiations with Charter School Capital, who has offered to advance operating capital in exchange for acquiring a portion of the schools accounts receivable. This continues to be an ongoing discussion and there is a proactive debt service payment placed in the budget in the event the Board chooses to move in this direction.

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*

Not Applicable. The school will not rely on assets from any external sources. As described in the budget and financing narrative, the Board has arranged for a long term lease for all necessary furniture, fixtures and equipment (FFET) to open and operate the school. Additional asset needs are provided for in the annual operating budget and increase as the school grows in enrollment.

Break even point Continued: This enrollment would further reduce the core instructional teacher requirement by eight, reducing the actual revenue needed to break even by an additional three hundred twenty thousand dollars, for an overall composite reduction to 60% of anticipated projected revenue, or the equivalent of approximately 360 students needed to break even. Contingency Plan continued: Should these proactive measures not fully ameliorate a deteriorating revenue situation, the Board and school leadership team through its established budget review process will identify potential expenses that can be reduced and act in the combined best interest of students and the financial longevity of the school. Should the revenue reduction be a result of lower than expected enrollment, the budget review will also include a reconciliation of current staffing needs and appropriate reductions in force (RIF) will occur within the first six weeks of school.

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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?

The board will work in conjunction with the financial accountant, auditor and school leadership to develop policies that comply with Generally Accepted Accounting Principals (GAAP), and all federal, state and local law and policy related to monitoring and use of public school funds and those funds received and discharged by a North Carolina Non-Profit Corporation. The internal control system will be documented and evaluated regularly by the board, school leadership, and financial accountant, and will be reviewed as part of the annual financial audit. An accounting policy and procedures manual will be developed that includes the following: an organizational chart which sets forth the actual lines of responsibility and that shows individual names and titles, accounts payable and accounts receivable listings, listing of all bank accounts and authorized signatories, payroll calendar and processing information, vendor files, lease and contract documents, segregation of duties chart, cash handling procedures, credit card policy, travel and expense policy, master copies of school-based forms (time sheets, expense reports, etc.) School staff will receive training about the internal control system and their individual responsibilities within the system. The organizational chart, accounting procedures, record retention policy, vendor list, and chart of accounts will be maintained on a timely basis to eliminate outdated information and include current information. Procedures will be followed by the schools office and leadership team that mirror widely established segregation of duties habits, such as the person making bank deposits is not the same person as who is reconciling those deposits. The school will inventory and track items purchased with school funds, especially those items with an initial value of 700 dollars or more, and also items purchased as a set with a combined initial value of \$700 or more, such as a textbook adoption. Items in these categories may be considered capital purchases and depreciated over time to accurately reflect the schools real asset position. Items in this category that break or no longer serve a useful function may be disposed of by the school. A disposal form which includes a record of the reason for the disposal as well as relevant tracking information on the item will be used, and noted in the inventory.

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

Not Applicable. There are no known or possible related party transactions the board is aware of at this time.

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.

Jay E. S Sharpe, CPA

702 Oberlin Road, Suite 410 Raleigh, North Carolina 27605 (919) 832-6848

Email: jsharpe@rivescpa.com

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Section VI: Financial Plan Concerns and Additional Questions	Reviewer	Page Reference
***Is it a realistic revenue projection to expect that half of the students will come from Guilford County?	Kebbler Williams	Budget Reven
***Is it a realistic revenue projection to expect that half of the students will come from Guilford County? ***The letter from Building Hope tells what services the organization can provide for the school, but does not specify what the organization will do for the school. It also does not specify how much the organization will provide for the school. The applicant has indicated "other funds" as part of its revenue projections, but did not supply any documentation of who is expected to provide the "other funds."	Kebbler Williams	Total Budget
Is the retirement contribution reasonable?	Shannon Stein	Total Budget
If teacher salary is budgeted for \$40,000 are you looking for teachers with less years of experience?	Jessica Kelly	Personnel Bu
How are you determining who receives benefits from the 55 employees?	Shannon Sellers	Personnel Bu
***A school nurse/health officer, guidance counselor, and technology staffer are not directly reflected in this budget as indicated earlier in the application. Two positions have been allotted in the budget for instructional support. What are these two positions? ***The applicant intends to contract with a vendor to participate in the National School Lunch Program, however, the budget reflects no school staff working in food service. What is the exact plan? ***This budget does not completely align with the staffing plan presented earlier in the application. For example, the staffing plan calls for 5 teacher assistants and 2 bus drivers. The budgets allows for 6 teacher assistants and 3 bus drivers. Which is correct? ***After School Care positions are not reflected in the budget (coordinator and 3 part-time teachers).	Kebbler Williams	Personnel Bu
Will \$30,000 be enough to cover transportation? Are you planning to buy buses or lease? Will \$12,000 cover gas for all activities you mention in other sections? What are miscellaneous expenses? Have you allotted enough money for Professional Development? What line item shows Professional Development?	Shannon Sellers	Operations B
Is the money set aside for transportation reasonable to lease/own, pay driver, etc.?	Shannon Stein	Operations B
Would like to hear more about the lease. Also what are the costs that make up the financial portion given that there is a full time finance officer? Also, audit fees, bank fees are listed separately. What is provided in the HR Support services? What is the debt service on the leased facility? What are general contracts?	Steven Walker	Operations B
Does the budget provide sufficient funds for contracts with related service providers?	Robert McOuat	Operations B
***The budget does not reflect a contract with a vendor for lunch. ***The budget reflects the purchase of computers for \$75,000 per year and software for \$22,000-\$26,000 per year. What is included in the instructional technology and equipment lease for \$200,000 per year? ***What is the professional contract - tuition and fees line item?	Kebbler Williams	Operations B
***While the applicant is projecting a surplus each year, previous questions raised impact the ability of the evaluator to assess the school's prprojected financial viability.	Kebbler Williams	Total Expend
Years 1 and 2 have operational expenses, net of facility payment, near or in excess of 80% of revenue. Will this allow the school to operate according to its desires or will that cause financial strain?	Amy Ruck Kagan	Total Expend
Why were Charlotte numbers used here, and this school has a higher student to teacher ratio than Charlotte? No breakeven point was provided for the budget as stated, but rather after reductions are made.	Steven Walker	Budget Narra
Is the accounting company listed a reputable company?	Shannon Stein	Budget Narra

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<p>***The applicant's explanation for why it will meet its enrollment projection includes information about schools in Charlotte. The applicant did not provide a clear and thoughtful explanation about why it believes there is demand for this school.</p> <p>***Earlier in the application, the board indicated that it would be receiving "other funds" as revenue - \$177,885 in year one to \$222,759 in year 5. In this part of the application, the applicant stated that it is not relying on other sources of funds. Which is correct?</p> <p>***The Operations budget includes a custodial contract, yet that contract is not mentioned in this part of the application. What is the plan for custodial services at the school?</p> <p>***What are the criteria and procedures for making large purchases?</p> <p>***Has the board considered purchasing used buses instead of new?</p> <p>***How will the board ensure that the school still meets its mission and identity as a STEM school if it has to enact its financial contingency plan?</p> <p>***The explanation of how the budget aligns with the mission and curricular offerings is vague and does not provide specific information for this school.</p>	Kebbler Williams	Budget Narra
Has the school identified the firm that will provide the financial audit?	Amy Ruck Kagan	Financial Au
I am marking the financial section as a fail for the time being but after getting some clarification on the budget, I may change it to a pass.	Steven Walker	Financial Au

Reviewer	Score
Alan Hawkes	
Shannon Sellers	Pass
Robert McOuat	
Lynn Kroeger	
Kebbler Williams	Fail
Shannon Stein	Pass
Deanna Townsend-Smith	
Steven Walker	Fail
Cheryl Turner	Pass
Amy Ruck Kagan	Pass
Alex Quigley	
Jessica Kelly	Pass

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VII AGREEMENT PAGE

Application Fee:

Pursuant to § 115C-218.1(c) the charter school applicant must submit a \$1000 application fee to the Office of Charter Schools. The applicant must submit their application fee by the September 19, 2016 5:00 pm EST deadline. Payments will be accepted in the form of a check or credit card. The Credit card Form is found on the Office of Charter Schools website. Cash is not accepted.

**Application Note: The applicant must mail the check or credit card form along with a letter indicating the name of the proposed charter school, contact information, and the enclosed payment amount to be received before or on the due date of September 19, 2016 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-218.1(c).

clemmonsforsyth

Date: 09/22/2017

Applicant Signature:

The foregoing application is submitted on behalf of Clemmons STEM Academy (*name of non-profit corporation or individuals submitting application*). The undersigned has read the application and hereby declares that the information contained in it is true and accurate to the best of his/her information and belief. The undersigned further represents that the applicant has read the Charter School Law and agrees to be governed by it, other applicable laws, and SBE regulations. Additionally, we understand the final approval of the charter is contingent upon successful completion of a mandatory planning year. Per SBE policy TCS-U-013 All new nonprofit boards receiving a charter must participate in a year-long planning program prior to the charter school's opening for students. The planning year provides an applicant time to prepare for the implementation of the school's curricular, financial, marketing, and facility plans. During this planning year, regular meetings are held with the Board of Directors and consultants from the Office of Charter Schools to provide information on the following topics: school opening plans, staff development, finance, governance, board training, marketing, policies and procedures, securing a school site, and hiring a school administrator. Final approval of the charter will be contingent upon successfully completing all of the planning program requirements.

Print/Type Name: clemmonsforsyth

Board Position: Board Chairperson

Signature: _____

Date: 09/22/2017

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

Notary Public

Official Seal

Clemmons STEM Academy - CSA will provide a safe and nurturing learning environment for student development and growth. The Schools students will be prepared to be responsible, caring and productive members of an ever changing, global society.

My commission expires: _____, 20_____.

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OVERALL ASSESSMENT

Would you, as an external evaluator, recommend an interview for this application? Remember that an external evaluator has no authority to bind the Advisory Board to a particular recommendation. This rubric, and the following recommendation, is simply a starting point for subcommittee and Advisory Board deliberations regarding which applicants to invite back for an interview.

<u>Total External Evaluator Votes</u>	
No	Yes

Would you, as a subcommittee, recommend an interview for this application? Remember that a subcommittee is not a quorum of the whole Advisory Board and has no authority to bind the Advisory Board to a particular recommendation. This rubric, and the following recommendation, is simply a starting point for Advisory Board deliberations regarding which applicants to invite back for an interview.

<u>Total Subcommittee Votes</u>	
No	Yes

Would you, as an Advisory Board, recommend this nonprofit group to the SBE to start the Planning year? The State Board of Education gives the final approval to start the Planning Year.

<u>CSAB Votes</u>	
No	Yes

Summary comments are to be provided in the appropriate section detailing the findings and/or concerns of the Public Charter School Advisory Council subcommittee.

<u>Initial Screening</u>

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Mission, Purposes, and Goals	- dtsmith840
Education Plan	- dtsmith840
Governance and Capacity	- dtsmith840
Operations	- dtsmith840
Financial Plan	- dtsmith840
OVERALL	- dtsmith840 - dtsmith840 - dtsmith840

External Evaluator

Mission, Purposes, and Goals	<p><u>Mission Statement</u> ***Nothing in the mission statement informs the reader that this is a STEM school. - kwilliams75</p> <p><u>Mission Statement</u> Why doesn't the mission statement mention anything about STEM? If STEM is the basis of your school, it should appear in the mission. The description does not give clarity to the STEM program at the school. - shannon1974</p> <p><u>Mission Statement</u> Mission statement should include STEM in it if that is a main component of the school. - jessica.kelly</p> <p><u>Mission Statement</u> The mission statement seems very generic and is not tied to anything that is being offered by the school. - dswalker</p> <p><u>Educational Need and Targeted Student Population</u> Is your target student population 792 or 798? There are discrepancies throughout the application. Have you budgeted for the Leader in Me training and program given the high cost? Can you be more specific about how you would be differentiated from local LEA programming? - shannon_stein</p> <p><u>Educational Need and Targeted Student Population</u> ***The applicant did not include a rationale for selecting the location. ***The applicant provided information related to the importance of a STEM education,</p>
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but did not demonstrate an actual or perceived need for this school in this community.
***The applicant provided a summary of its education plan, but did not tell how it will compare or differ from the LEA.
- kwilliams75

Educational Need and Targeted Student Population

What is the rationale for having a charter school in this location? The need for this school is not addressed.

How will the educational plan be different from the LEA? - shannon1974

Educational Need and Targeted Student Population

School need should be clarified. Are other schools in the area not doing STEM? - jessica.kelly

Purposes of Proposed Charter School

What collaboration time will be provided to teachers since they are supposed to have cross-curricular lessons?

What is the vision for what the STEM program will look like? - shannon_stein

Purposes of Proposed Charter School

You mention several different programs, but STEM is the main focus based on the name of your school, how will STEM be fully implemented and what will it look like? - shannon1974

Purposes of Proposed Charter School

Are there any other STEM schools in the area, either charter or traditional? - arkagan

Purposes of Proposed Charter School

Who will be conducting the extensive training for teachers? Is this worked into the budget? - jessica.kelly

Goals for the Proposed Charter School

For reading/math goals, how do you define composite average?

Is "exceeding growth" reasonable for a new school?

Do you offer enough extracurriculars to have all students participate? What about your youngest students?

How will the Board be trained? - shannon_stein

Goals for the Proposed Charter School

***The goals, as written, are not SMART goals. - kwilliams75

Goals for the Proposed Charter School

What is the "composite average?"

Is it realistic that your school will "exceed growth" in the first year? - shannon1974

Goals for the Proposed Charter School

Please clarify how goals will be measured.

Clarify exceeding growth in first year; how is this a realistic goal? - jessica.kelly

Goals for the Proposed Charter School

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	<p>What are the averages of the LEA? - dswalker</p>
<p>Education Plan</p>	<p><u>Instructional Program</u> Is there confusion as to whether this is a STEM or STEAM school? (i.e. 1st paragraph of the instructional section) - shannon_stein</p> <p><u>Instructional Program</u> ***Is the applicant proposing a STEM school or a STEAM school? The description is not clear. ***What are the assessment strategies associated with the selected instructional model? ***How does this instructional model meet the needs of the targeted student population and lead to improved student performance? - kwilliams75</p> <p><u>Instructional Program</u> If this is a STEM school, why is STEAM being addressed in the description? How will STEM, Project based learning and Project Lead the Way increase student performance? - shannon1974</p> <p><u>Instructional Program</u> Better description needed on how this will meet the needs of the targeted population. Now stating STEAM in lieu of STEM. - jessica.kelly</p> <p><u>Curriculum and Instructional Design</u> What will be the main instructional delivery method? (i.e. there are so many listed that it seems a bit of a "shotgun" approach to what they may use) Why would a strong school not take advantage of more instructional time? (i.e. # of days of instruction listed at 179) Is 21 days of PD reasonable for regular teacher pay? - shannon_stein</p> <p><u>Curriculum and Instructional Design</u> ***What is the projected class size at each grade level? ***If this is to be a STEM school, why is there a separate block of time for STEM? Why is it not interwoven throughout the school day? ***The calendar narrative and the calendar included in the appendix do not match. - kwilliams75</p> <p><u>Curriculum and Instructional Design</u> What will be the average class size, student-teacher ratio? Which method will be the main method for instructional delivery? How will teachers learn each of the methods and be experts with so many methods? The calendar provided in the appendix shows 178 student days and the narrative says 179. Which is correct? - shannon1974</p> <p><u>Curriculum and Instructional Design</u> Does the school have guidelines or goals regarding classroom size or teacher/student ratio? - arkagan</p>

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<p><u>Curriculum and Instructional Design</u> Calendar days inaccurate.</p> <p>There seems to be an excessive number of programs/instructional methods being listed. With so many programs in year one will this be confusing to students and staff? - jessica.kelly</p> <p><u>Curriculum and Instructional Design</u> I like the way that STEM is being implemented in this plan. - dswalker</p> <p><u>Special Programs and "At-Risk" Students</u> Who sits on the AIG team?</p> <p>The school lists ELP (extended learning program) for at-risk students, yet are they taking advantage of maximum amount of direct instruction time? - shannon_stein</p> <p><u>Special Programs and "At-Risk" Students</u> ***What is the difference between the ELL Liaison, the ELL Resource Teacher, and the ELL-endorsed Staff Member? - kwilliams75</p> <p><u>Special Programs and "At-Risk" Students</u> Students are not exited from ELL based on classroom performance. Students that are identified ELL through the WIDA-ACCESS take the ACCESS test each year that determines eligibility. Are you not planning to offer this state test? Are the ELL Liaison, ELL Resource teacher and the ELL Endorsed staff member the same person? Who is on the AIG team? AIG doesn't mean more work, what do you mean by presentations of culminating project? Is this an addition to the project that others will be completing or is this an extra project because the student is AIG? The project should be differentiated to challenge the AIG student but not an additional project per say. - shannon1974</p> <p><u>Special Programs and "At-Risk" Students</u> Clarification needed on ELL positions. Who is included on the AIG team? - jessica.kelly</p> <p><u>Exceptional Children – Identification and Records</u> ***How will the school identify students who are enrolled that have previously been protected under Section 504 of the Rehabilitation Act? ***How will student evaluations and assessments be completed for students who may be eligible for special education services? ***How will the records of students with disabilities and 504 Accommodation Plans be requested from students' previous schools? ***How will the records of students with disabilities and 504 Accommodation Plans remain confidential? - kwilliams75</p> <p><u>Exceptional Children – Identification and Records</u> There is no information regarding 504 plans and the implementation and requirements. How will these students be identified? How will 504 Plans be requested from previous schools? - shannon1974</p> <p><u>Exceptional Children – Identification and Records</u> s there a missing or extra word in this sentence? (The school A transferring EC student is a</p>
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	<p>student ...). What is the meaning f this sentence fragment? (Request for initial evaluation or determination of eligibility.). - robert_mcouat1</p> <p><u>Exceptional Children – Identification and Records</u> Clarification needed on 504 plans and processes. - jessica.kelly</p> <p><u>Exceptional Children – Education Programming</u> ***What is the plan to provide services for students with severe needs who require a separate setting? ***What is the source of the supplemental EC funding mentioned? ***How will the implementation of the IEP be reported to the students and parents? ***How does the educational plan for serving Exceptional Children align with the overall proposed curriculum, instructional methods, and the school's mission? ***Students are to be served in the Least Restrictive environment - period - not "whenever possible." Further the school is responsible for providing a full continuum of services at all times - not "whenever possible." - kwilliams75</p> <p><u>Exceptional Children – Education Programming</u> Students are given the right to a Free and Appropriate Education at all times not "whenever possible." How will your provide this at all times? You state, "The school will provide services to students whose needs can be met in the traditional classroom setting and with additional levels of support offered by certified EC staff" how will you handle students that require a separate setting? Where does the supplemental EC funding come from? - shannon1974</p> <p><u>Exceptional Children – Education Programming</u> Concerns over serving of EC students. "whenever possible" is concerning - what will occur if there are students with more severe needs. - jessica.kelly</p> <p><u>Student Performance Standards</u> ***What are the student performance standards for the school as a whole? ***What are the school's exit standards for the last grade served? ***Why are there no promotion standards or exit standards related to STEM? - kwilliams75</p> <p><u>Student Performance Standards</u> What is considered proficient for promotion? what will be considered mastery on the bench marks?What are your STEM goals for student performance? Other than becoming a B School, what are your specific goals for student performance? With all the bench mark assessments you provide, how will this drive instruction? - shannon1974</p> <p><u>Student Performance Standards</u> What is going to be considered proficiency for promotion? What steps will occur prior to recommending a student for retention? - jessica.kelly</p> <p><u>Student Conduct and Discipline</u> Is the list of preliminary offenses that could lead to suspension/expulsion listed?</p> <p>Is there a clear process of how students with disabilities will be addressed as it relates to student conduct violations? - shannon_stein</p>
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	<p><u>Student Conduct and Discipline</u> ***The discipline plan included in the appendix is not for this school. It includes high school students and this school will ultimately only serve grades K-8. ***What are the due process rights for students with disabilities when a suspension or expulsion is recommended by the principal? - kwilliams75</p> <p><u>Student Conduct and Discipline</u> Is there a process in place for Due process for students with disabilities? What criteria leads to suspension? The Discipline Plan in Appendix O references high school and middle school. Is this your plan? If so, why include high school when you are applying to be a K-8 school? - shannon1974</p> <p><u>Student Conduct and Discipline</u> Does the school have policies to address students that do not follow the leadership plan or demonstrate behaviors contrary to those accepted? - arkagan</p> <p><u>Student Conduct and Discipline</u> How will students with disabilities be handled in terms of conduct? Discipline plan is not indicated for this school; showing high school when this is a K-8 application. - jessica.kelly</p>
<p>Governance and Capacity</p>	<p><u>Private Non-Profit Corporation</u> ***A fax number was not provided. - kwilliams75</p> <p><u>Tax-Exempt Status 501 (c)(3)</u> NA - jessica.kelly</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> What are the proposed term limits and turn-over procedures for Board members? - shannon_stein</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> How will the board be evaluated? - shannon1974</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> ***What is the reporting structure of the School Advisory Council and the Parent Teacher Organization as it relates to the governing board and school leadership? ***How will the governing board and individual board members be evaluated? - kwilliams75</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Please clarify how the board will be evaluated. - jessica.kelly</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> The background of the board is very strong. My only concern is the lack of K-8 education experience on the board but this could easily be remedied by the hiring of the strong and experienced head of school. - dswalker</p> <p><u>Proposed Management Organization (EMO/CMO)</u> NA - jessica.kelly</p> <p><u>Staffing Plans, Hiring, and Management</u></p>

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	<p>The plan states that the school will recruit "instructional experts with competitive pay", but isn't the budgeted amount for teachers in-line with inexperienced local teacher pay?</p> <p>What issues can staff grieve? - shannon_stein</p> <p><u>Staffing Plans, Hiring, and Management</u> Do you not plan to have an ELL teacher? Are you planning to find a person that is certified in EC, ELL and AIG instead of one person for each area? It will be difficult to find one person that is certified in each of these areas? Your anticipated positions only list EC teacher and your statement at the bottom suggest one person to serve in all 3 roles. - shannon1974</p> <p><u>Staffing Plans, Hiring, and Management</u> ***The projected staff does not include an ELL resource teacher or a Gifted Services Provider as noted earlier in the application. ***What are the board's procedures for hiring and dismissing staff? ***If the grievance is with the principal, and the letter of grievance is submitted to the chair or vice chair of the board as indicated in the policy, how do the steps change? ***What qualifications must teacher assistants have to be hired? What are their expected roles and responsibilities? ***What qualifications must the office staff and business manager have to be hired? What are their expected roles and responsibilities? ***What qualifications must the registrar, maintenance/cafeteria staff, technology staff, nurse/health officer, guidance staff, after school coordinator, and bus drivers have to be hired? What are their expected roles and responsibilities? ***Is the board expecting to find one person certified to work with EC, ELL, and AIG students or is the board planning to hire one individual certified to work with EC, one individual certified to work with ELL, and one individual certified to work with AIG? - kwilliams75</p> <p><u>Staffing Plans, Hiring, and Management</u> No ELL teacher listed; who will provide services to these students? - jessica.kelly</p> <p><u>Staff Evaluation and Professional Development</u> There is an impressive list of PD opportunities that will be offered in year #1, however does the budget adequately account for the cost of vendor training? - shannon_stein</p> <p><u>Staff Evaluation and Professional Development</u> Have you alloted enough money in your budget to cover the rigorous professional development? - shannon1974</p> <p><u>Staff Evaluation and Professional Development</u> ***Who will serve as the Licensure Director? ***Provide more details about the Extended Learning Program. ***How will professional development be delivered after the school year begins? How many days/hours will be dedicated to professional development for teachers? - kwilliams75</p> <p><u>Staff Evaluation and Professional Development</u> Is the extensive list of professional development incorporated into the budget? What continuous professional development will need to occur? - jessica.kelly</p> <p><u>Marketing Plan</u> ***This marketing plan is not for this school; it is for a school in Charlotte. - kwilliams75</p>
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	<p><u>Marketing Plan</u> What is the timeframe for when the marketing plan will be implemented? Are there contingency plans to accelerate or shift resources if initial success is not as anticipated? - arkagan</p> <p><u>Parent and Community Involvement</u> ***This parent and community involvement plan is not for this school; it is for a school in Charlotte. - kwilliams75</p> <p><u>Parent and Community Involvement</u> Is this plan taken from another school? - jessica.kelly</p> <p><u>Admissions Policy</u> Why not just keep enrollment open if the spots are not filled (i.e vs. a second registration period)? - shannon_stein</p> <p><u>Admissions Policy</u> Why are you conducting 2 registration periods? If you have open slots after the first registration period, why not continue to have open enrollment? - shannon1974</p> <p><u>Admissions Policy</u> ***What are the actual dates for the first tentative open enrollment period? ***Why is there a second registration period? How will the school treat the students who are on the wait list from the first lottery/registration period when the second registration period opens? - kwilliams75</p> <p><u>Projected Student Enrollment (Table)</u> The applicant is projecting that half of its students will come from Guilford County. Is this a reasonable estimate? - kwilliams75</p> <p><u>Weighted Lottery</u> Clarification needed on two registration periods. - jessica.kelly</p>
<p>Operations</p>	<p><u>Transportation Plan</u> Will the school own the buses or outsource the operation? - shannon_stein</p> <p><u>Transportation Plan</u> What will you do if a student needs to ride a bus, but the bus is full based on your "first come first serve" policy for buses? This could be a potential issue for students. - shannon1974</p> <p><u>Transportation Plan</u> ***How does this plan support the applicant's goal to mirror the enrollment of Winston-Salem/Forsyth County Schools at 40.2 percent White, 28.5 percent African-American, 24.5 percent Hispanic, 4.0 percent Multiracial, 2.5 percent Asian, and less than 1 percent American Indian or Native Hawaiian/Pacific Islander? ***In one place, the applicant says that it will provide transportation for students living in a 1-5 mile radius of the school. In another place, the applicant says that bus depot stops will be offered within a 1-4 mile radius. Which is correct? What if students who desire to attend the school need bus transportation and live outside the 5-mile radius? - kwilliams75</p> <p><u>Transportation Plan</u> How will students that live outside the radius have transportation? What constitutes if a student qualifies for bus transportation? - jessica.kelly</p> <p><u>Transportation Plan</u></p>

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	<p>Bus transportation will be used. - dswalker</p> <p><u>School Lunch Plan</u> Outsourcing and using NSLP. - dswalker</p> <p><u>Facility and Facility Contingency Plan</u> Where would the modular units go if needed as a contingency? - shannon_stein</p> <p><u>Facility and Facility Contingency Plan</u> ***How does the cost per square foot compare to other educational spaces in Forsyth County? ***What is the expected square footage of the facility? - kwilliams75</p> <p><u>Facility and Facility Contingency Plan</u> What are the timeframes that the school will monitor to determine progress and viability of the real estate transaction? Closing date, lease date, TCO date, CO date, etc? - arkagan</p> <p><u>Facility and Facility Contingency Plan</u> If the plans do not go through is there alternate plans being seeked out for a location for the school? - jessica.kelly</p>
<p>Financial Plan</p>	<p><u>Budget Revenue Projections from Each LEA (Table)</u> ***Is it a realistic revenue projection to expect that half of the students will come from Guilford County? - kwilliams75</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Is the retirement contribution reasonable? - shannon_stein</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> ***Is it a realistic revenue projection to expect that half of the students will come from Guilford County? ***The letter from Building Hope tells what services the organization can provide for the school, but does not specify what the organization will do for the school. It also does not specify how much the organization will provide for the school. The applicant has indicated "other funds" as part of its revenue projections, but did not supply any documentation of who is expected to provide the "other funds." - kwilliams75</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> How are you determining who receives benefits from the 55 employees? - shannon1974</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> ***A school nurse/health officer, guidance counselor, and technology staffer are not directly reflected in this budget as indicated earlier in the application. Two positions have been allotted in the budget for instructional support. What are these two positions? ***The applicant intends to contract with a vendor to participate in the National School Lunch Program, however, the budget reflects no school staff working in food service. What is the exact plan? ***This budget does not completely align with the staffing plan presented earlier in the application. For example, the staffing plan calls for 5 teacher assistants and 2 bus drivers. The budgets allows for 6 teacher assistants and 3 bus drivers. Which is correct? ***After School Care positions are not reflected in the budget (coordinator and 3 part-time teachers). - kwilliams75</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u></p>

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	<p>If teacher salary is budgeted for \$40,000 are you looking for teachers with less years of experience? - jessica.kelly</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Is the money set aside for transportation reasonable to lease/own, pay driver, etc.? - shannon_stein</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Will \$30,000 be enough to cover transportation? Are you planning to buy buses or lease? Will \$12,000 cover gas for all activities you mention in other sections? What are miscellaneous expenses? Have you allotted enough money for Professional Development? What line item shows Professional Development? - shannon1974</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Does the budget provide sufficient funds for contracts with related service providers? - robert_mcouat1</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> ***The budget does not reflect a contract with a vendor for lunch. ***The budget reflects the purchase of computers for \$75,000 per year and software for \$22,000-\$26,000 per year. What is included in the instructional technology and equipment lease for \$200,000 per year? ***What is the professional contract - tuition and fees line item? - kwilliams75</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Would like to hear more about the lease. Also what are the costs that make up the financial portion given that there is a full time finance officer? Also, audit fees, bank fees are listed separately. What is provided in the HR Support services? What is the debt service on the leased facility? What are general contracts? - dswalker</p> <p><u>Total Expenditure Projections (Table)</u> ***While the applicant is projecting a surplus each year, previous questions raised impact the ability of the evaluator to assess the school's prpojected financial viability. - kwilliams75</p> <p><u>Total Expenditure Projections (Table)</u> Years 1 and 2 have operational expenses, net of facility payment, near or in excess of 80% of revenue. Will this allow the school to operate according to its desires or will that cause financial strain? - arkagan</p> <p><u>Budget Narrative</u> Is the accounting company listed a reputable company? - shannon_stein</p> <p><u>Budget Narrative</u> ***The applicant's explanation for why it will meet its enrollment projection includes information about schools in Charlotte. The applicant did not provide a clear and thoughtful explanation about why it believes there is demand for this school. ***Earlier in the application, the board indicated that it would be receiving "other funds" as revenue - \$177,885 in year one to \$222,759 in year 5. In this part of the application, the applicant stated that it is not relying on other sources of funds. Which is correct? ***The Operations budget includes a custodial contract, yet that contract is not mentioned in this part of the application. What is the plan for custodial services at the school? ***What are the criteria and procedures for making large purchases?</p>
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	<p>***Has the board considered purchasing used buses instead of new?</p> <p>***How will the board ensure that the school still meets its mission and identity as a STEM school if it has to enact its financial contingency plan?</p> <p>***The explanation of how the budget aligns with the mission and curricular offerings is vague and does not provide specific information for this school. - kwilliams75</p> <p><u>Budget Narrative</u> Why were Charlotte numbers used here, and this school has a higher student to teacher ratio than Charlotte? No breakeven point was provided for the budget as stated, but rather after reductions are made. - dswalker</p> <p><u>Financial Audits</u> Has the school identified the firm that will provide the financial audit? - arkagan</p> <p><u>Financial Audits</u> I am marking the financial section as a fail for the time being but after getting some clarification on the budget, I may change it to a pass. - dswalker</p>
OVERALL	<p><u>Cover Page</u> Will Alliance Education Services ever be paid a fee for their assistance in writing the application? If so, what is the agreed upon arrangement? - arkagan</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Starting off K-6 may be difficult. - dswalker</p>

Charter School Advisory Board Subcommittee

Mission, Purposes, and Goals	
Education Plan	
Governance and Capacity	
Operations	
Financial Plan	
OVERALL	

Overall Summary

Initial Screening 09/27/2017	The Office of Charter Schools deemed this application complete on September 27, 2017. No further information is needed for the application evaluation.
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<p>Application Review</p>	<p>OCS provided a brief overview of the proposed application including proposed county, proposed enrollment for the first five (5) years, and if the application had an LEA impact statement and/or due diligence. Additionally, the pass/fail ratings from the application rubric were shared. Applicant was assisted by Alliance Education Services and Goodall Consulting and did not make a note regarding payment of any fees.</p> <p>Mr. Walker led the Policy Committee on discussion of the application. Mr. Walker commented that starting off as a K-6 school was difficult. He also noted that testing would occur in four grades right off the bat, and this makes it a little more difficult there. Ms. Turner commented about the application and mentioned that since it was written by other individuals the board had an obligation to at least read the final submission. One example cited by Ms. Turner includes that there are parts of the application that talk about meeting the goals of Charlotte and other parts indicated that they would meet the goals of Florida. Mr. Walker felt the mission statement was generic and was not quite unique to the school. Ms. Turner identified that the mission statement does not mention STEM, though they are a STEM school, but in the explanation portion the applicants reference STEM but make no mention of anything included in the original mission statement.</p> <p>Mr. Walker referenced the goals section of the application, specifically that they noted a goal of being comparable to the LEA but did not include the actual scores of the proposed LEA. Additionally, he commented that out of all the individuals that reviewed the application, he passed the education plan. Mr. Walker stated that the external evaluators brought up a good point on whether it is a STEAM school or a STEM school.</p> <p>Ms. Turner identified that the applicant mentioned a myriad of things in the education plan, for example programs and strategies, and she commented that it could all be integrated but that it would not be easy and asked the board how they plan to accomplish all the programs mentioned in the application. Mrs. Kroeger noted that she did not see evidence that the programs they plan to offer had the support as evidenced in the budget. Mr. Walker thought the board composition was strong, but suggested the school could add more individuals with experience in K-8 education.</p> <p>Mr. Walker posed a clarification question to the board asking whether anyone on the board had K-12 education experience. The Board responded that April Broadway was an academic advisor, co-director of guidance and counseling, the COO of a community resource solution.</p> <p>Mrs. Kroeger asked the board to clarify the busing of students within five miles of the school. The Board responded that transportation for traditional public schools usually happens in a 1 to 5-mile radius of a school, but the board has discussed that they may benefit from a 4 to 8-mile radius. Additionally, they shared that there is nothing that disqualifies a child from riding the bus, that transportation will be first come first serve, and the routes would be created based on student enrollment. The Board identified that Davie County and Forsyth County are where the school will be pulling from, but that most students will be coming from Forsyth County.</p> <p>Ms. Turner sought clarification around the enrollment numbers projecting that half of the students will come from Davie County and asked a question around where most students were expected to reside. The Board responded that at least half of the students will come from Forsyth County with the remaining coming from Davie, Davidson, and Guilford County.</p>
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<p>Application Interview</p>	
<p>OVERALL</p>	<p>Mr. Walker identified that there are two facilities budget lines and noted that it is odd to have a debt service line along with a lease/mortgage line. Ms. Turner asked if the board has a lease why they would also have a debt service line. Mr. Walker noted that the budget included a financial services professional contracting around \$35,000 and a full-time finance office for \$40,000 and commented on how these two overlapped, not including the audit. The Board responded that the lease is the facility rent payment while the debt service line would include the debt for a low interest loan to purchase fixtures, furniture, and items for up-fit for the facility.</p> <p>Mr. Walker pointed out that the HR services for \$15,000 stuck out. Mrs. Kroeger commented that it appears that the applicant may be overstating or inflating revenues and expressed concerns with the low expenses budgeted around health insurance, retirement, and technology. Mr. Walker commented that classroom technology, including an equipment lease that amounts to \$1,000,000 over five years, seemed high.</p> <p>Mr. Walker expressed that the application needed some work, including the fact that Ms. Turner pointed out that the application mentioned both Florida and Charlotte, and he commented that he would like to see the board more involved in the application.</p> <p>Ms. Turner made a motion for the Policy Committee to recommend to the full board not to move the school forward to full interview. Seconded by Mrs. Kroeger. The motion passed unanimously in the Policy Committee.</p> <p>Mr. Walker made a motion to full board to not move the school forward for full interview. Mr. Maimone seconded. Motion carried unanimously.</p>