

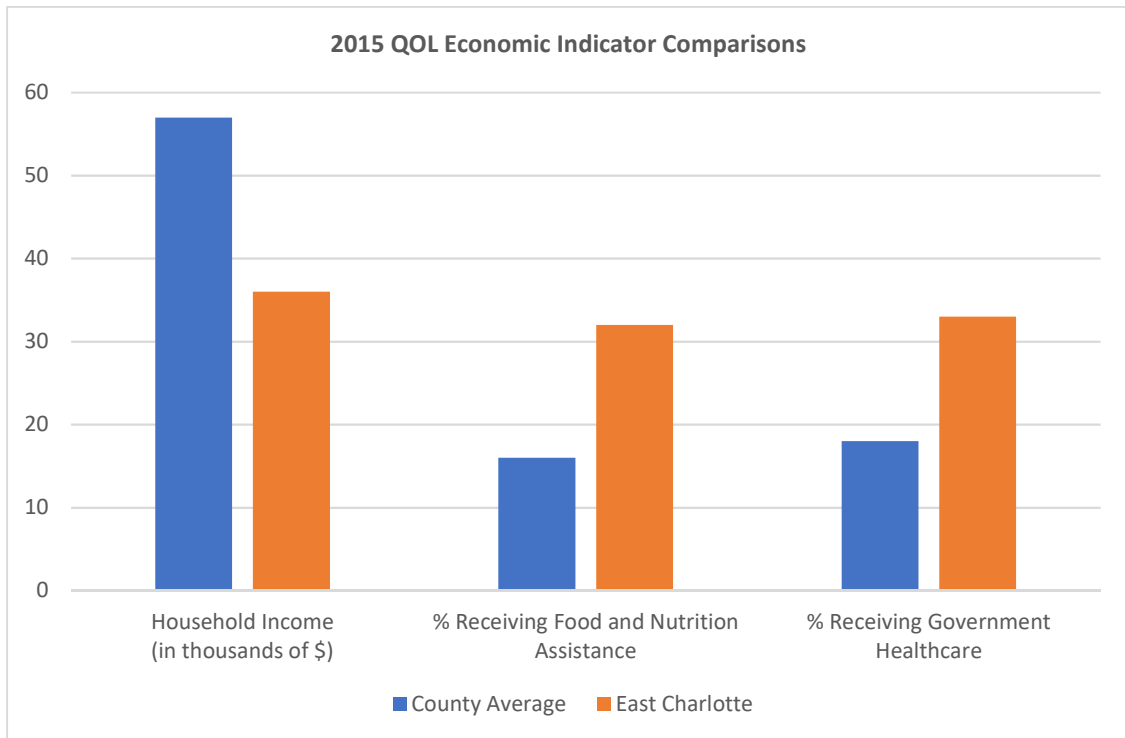
A. Evidence of Educational Need (No more than a total of five pages)*

Movement School East will be located in one of Charlotte’s most diverse and rapidly growing areas, comprised of families from a myriad of different economic, racial and national backgrounds. This area is also home to a large and rapidly growing refugee population. While this area is made up of extraordinary families and communities, children in this area face many health and economic challenges. Numerous studies have found that the quality of education a child receives is directly related to his or her health and economic outcomes in life. Research also indicates that a high-quality education is one of the most powerful enablers of economic mobility. Movement School East will contribute to the health and vitality of children in east Charlotte by providing families with a much needed educational option, tailor-made for this unique area of the city.

Data from the 2015 Charlotte-Mecklenburg Quality of Life Explorer ([http:// mcmmap.org/qol/](http://mcmmap.org/qol/)) provide insight into the neighborhoods surrounding the intended location of the school.

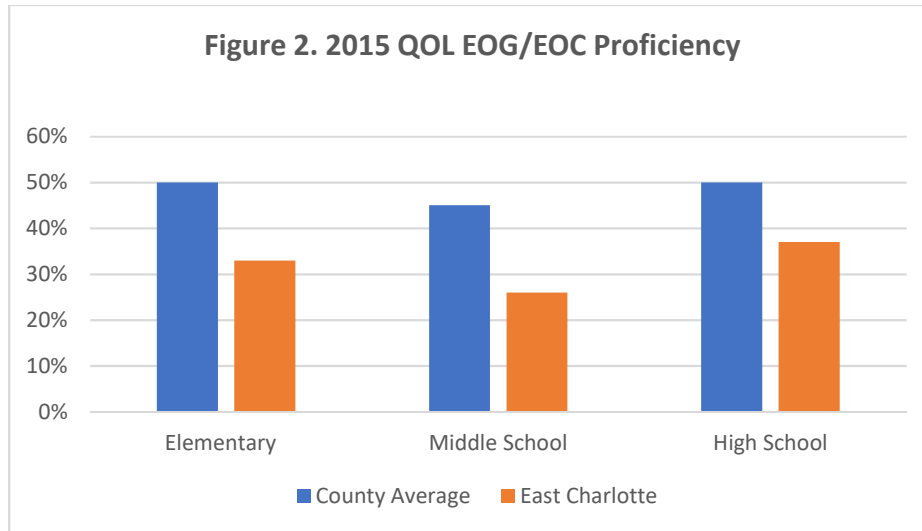
Economic Need

Movement School East’s target area is comprised of seventy-one unique neighborhood service areas. These neighborhoods have an average annual household income of \$36,000, only 63% of the county-wide average income of \$57,000. In addition, the rate of families requiring food and nutrition assistance is double the county-wide average as is the number of families requiring government healthcare. These figures significantly under-represent the need of the refugee community in this area. As illustrated in the chart below, this area is home to many families with limited economic and healthcare resources, operating with little safety-net or margin for error.



Educational Disparity

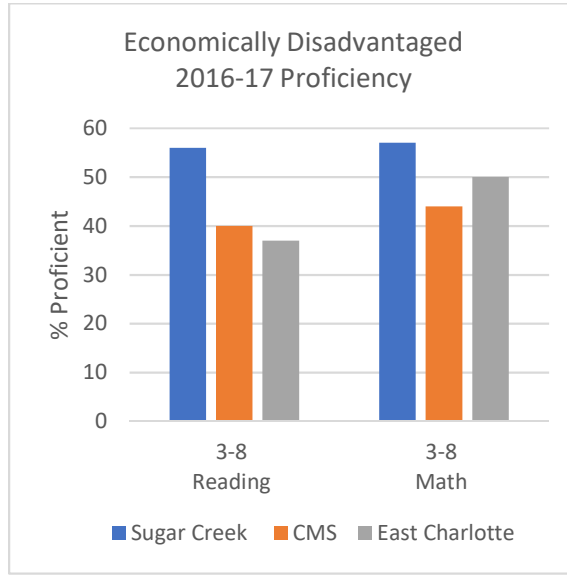
The 2015 Quality of Life Survey also analyzed EOG proficiency rates for students in elementary (3-5) and middle school and EOC proficiency for high school students. At every level, the proficiency rate of students in the seventy-one unique neighborhood service areas in east Charlotte is lower than the Mecklenburg County average. The disparity is most pronounced at the elementary level.



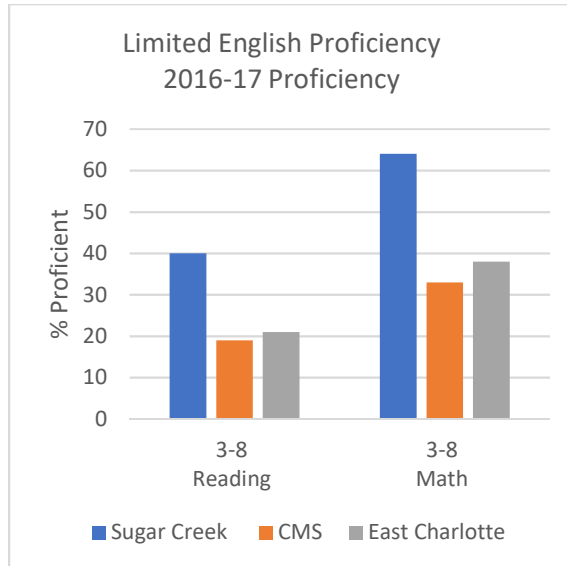
It has long been proven that “students who fail to successfully navigate the educational system are less likely to reach top-tier positions, less likely to escape working class positions, and less likely to become upwardly mobile. These students also have an increased risk of poverty” (Friend, Hunter & Fletcher, 2011). Research has also shown that lack of educational attainment is positively associated with social, economic, and health problems such as unemployment, criminal activity, feelings of dissatisfaction, low self-esteem, and stifled motivation (Greenberg, Michalopoulos, & Robins, 2003). These patterns of disparity are currently being perpetuated in east Charlotte. The existing educational opportunities do not offer the educational plan or the wrap-around services necessary to meet the needs of these students. Movement School East proposes to be a unique option to serve students and families in east Charlotte.

Educational Disparities for At-Risk Students

The educational disparities in east Charlotte are most dramatic for Economically Disadvantaged Students (EDS) and students with Limited English Proficiency (LEP), the primary populations that Movement School East seeks to serve. Using 2016-17 EOG proficiency data, the charts below compare the performance of at-risk students at Sugar Creek with at risk students in CMS and in east Charlotte. For EDS students, Sugar Creek outperforms CMS and east Charlotte schools in reading and math.



For LEP students, Sugar Creek’s proficiency rates were double the rates of comparison schools.



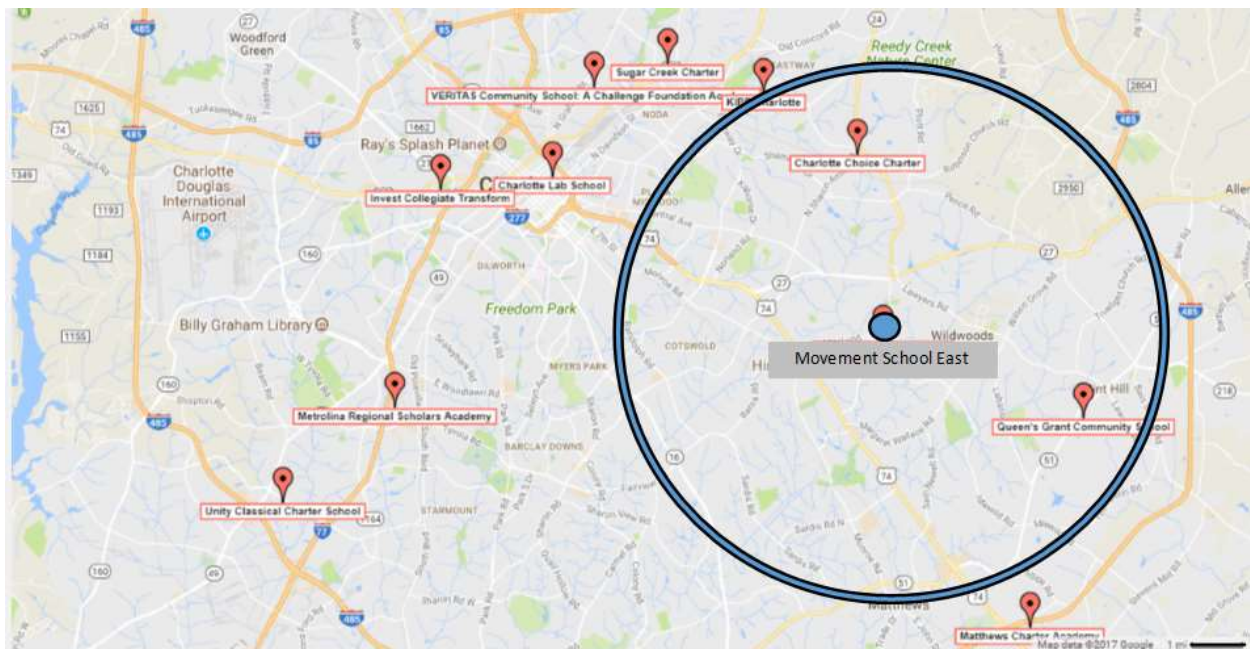
Based on the above data, it is clear that a successful replication of the Sugar Creek Charter school would bring significant academic benefit to at-risk students in east Charlotte.

Parent and Community Interest

Movement School conducted a survey of families in the east Charlotte community where we intend to open. We partnered with Project 658, a non-profit that serves refugee families, to ensure that refugees were included in our sample. Of the forty families surveyed, 98% thought that east Charlotte would benefit from a charter school focused on academic and character development and 100% of those with children would consider sending their child to such a school. The results to the survey are attached below. We also conducted an informational interview with the Executive Director of Project 658 who indicated that there was a strong need and interest for additional education options in this area of Charlotte. The executive director further expressed a desire to partner with Movement School East for the purpose of providing wrap-around services for refugee students and their families. Additionally, the executive director of education for the Movement Foundation spent the last nine years working and cultivating relationships in the east Charlotte community and similarly believes there is a need for additional options in this area of the city.

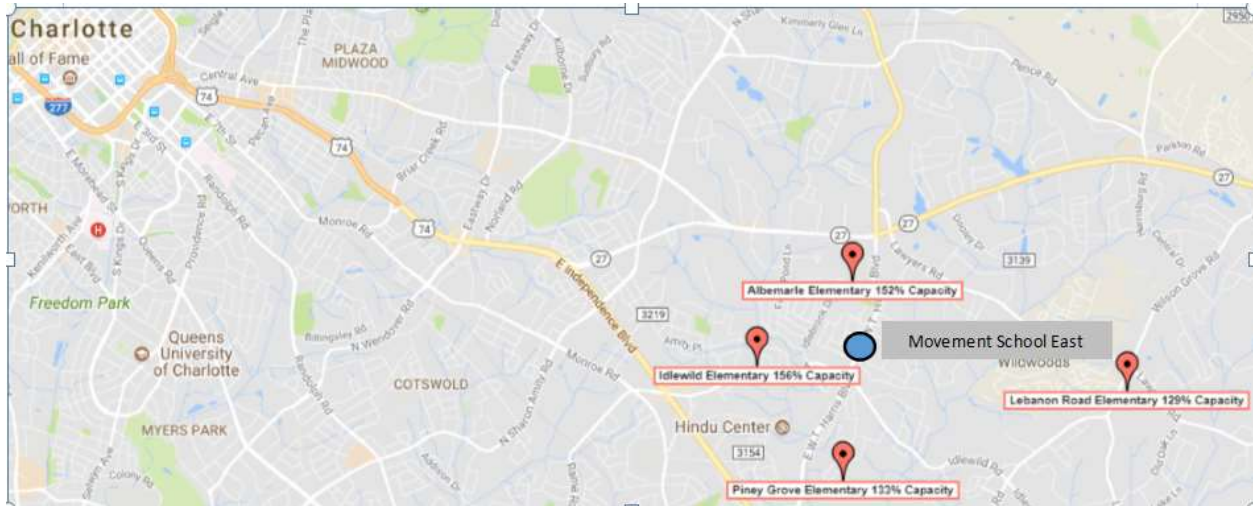
No Existing Charters in the Area

There are currently no charter schools operating in this area of east Charlotte. As the map below illustrates, there are only two charter schools currently operating within the schools proposed five-mile transportation radius. This is further evidence of the need for additional charter options for this sector of the city.



Over-Capacity Traditional Public Schools

Traditional public elementary schools in this area are already operating beyond their intended capacity. The four schools closest to Movement School East's target neighborhoods--Albemarle Elementary, Idlewild, Piney Grove, and Lebanon Road--are operating at 143%, or 1689 students, over capacity. These schools currently require 88 mobile units to accommodate their overflow of students. The continued rapid growth of this area will only exacerbate this problem.



REFERENCES

- Friend, C.A. Hunter, A.G., Fletcher, A.C. (2011). Parental racial socialization and the academic achievement of African American children: A cultural-ecological approach. *Journal of African American Studies*, 15, 1, 40-57.
- Greenberg, D., Michalopoulos, C. & Robins, P. (2003). A meta-analysis of government sponsored training programs. *Industrial and Labor Relations Review*, 57(1), 31-53.
- US Census Bureau. (2005, 15/July). US Census Bureau. In *US Census Bureau*. Retrieved from US Census Bureau: http://ferret.bls.census.gov/macro/032002/perinc/new01_001.htm.
- US Department of Education. (2003, 30/April). *US Department of Education* (Employment for young adults by educational attainment). Retrieved from US Department of Education: <http://nces.ed.gov/pubs2000/2000007.pdf>.



Name: _____

Zip Code: _____

Movement School Survey

We are exploring the possibility of adding a charter school to your neighborhood. We want to get your input on the need for another school in this area. Please take a moment to complete the survey below.

1. Do you have children?

_____ YES (82%)

_____ NO (28%)

2. Do you think east Charlotte would benefit from a charter school focused on a proven model of academic and character development?

_____ YES (98%)

_____ NO (0%)

_____ MAYBE (2%)

3. If this charter school was available in your area, would you consider sending your children?

_____ YES (75%)

_____ NO (0%)

_____ Does not apply (25%)



Nombre: _____

Código Postal: _____

**Encuesta Escuela Movimiento
(Movement School Survey)**

Estamos explorando la posibilidad de agregar una escuela autónoma (escuela charter) a su vecindario. Nos gustaría saber su opinión a cerca de la necesidad de apertura de otra escuela en esta área. Por favor tome unos momentos para completar la encuesta que se encuentra adjunta.

1. Tiene hijos(as)?

_____ SI

_____ NO

2. Cree que el este de Charlotte se beneficiaría de la apertura de una escuela enfocada en un modelo que ha sido comprobado tanto en desarrollo académico como de carácter?

_____ SI

_____ NO

3. Si esta escuela autónoma (escuela charter) estuviera disponible en su área consideraría el enviar a sus hijos(as)?

_____ YES

_____ NO

_____ No Aplica

2016-17 State, District, and School Level Summary Data

Percentages greater than 95 are displayed as >95 and percentages less than 5 are displayed as <5.

An * or (Insufficient) or a blank cell indicates a school does not have tested grades/sufficient data for reporting.

College/Career Ready (CCR) - Level 4 & 5 /Grade Level Proficient (GLP) - Level 3 & Above

Note : Filter applied to all column headers. For sorting or filtering, click on the down arrow.

District Name	School Code	School Name	State Board District	Grade Span	Title I School	School Performance Grade (SPG)	SPG Score	Reading SPG	Reading SPG Score
Charter Schools	60B000	Sugar Creek Charter	Southwest	0K-11	Y	C	63	C	63

Math SPG																			
Math SPG Score	58																		
EVAAS Growth Status	Met																		
EVAAS Growth Index	-0.45																		
Number of Participation Targets	28																		
Percent Participation Targets Met	100.0																		
Graduation Project	N																		
Summer Program	Y																		
ACT Denominator	34																		
ACT Percent	38.2																		
ACT WorkKeys Denominator																			
ACT WorkKeys Percent																			
Passing NC Math 3 Denominator																			
Passing NC Math 3 Percent																			
4-Year Cohort Graduation Rate Denominator																			
4-Year Cohort Graduation Rate Percent																			
5-Year Cohort Graduation Rate Denominator																			
5-Year Cohort Graduation Rate Percent																			
Performance Composite Denominator	2173																		

Performance Composite Percent College/Career Ready	43.7
Performance Composite Percent Grade Level Proficient	60.0
NC Math 1 Denominator	99
NC Math 1 Percent College/Career Ready	37.4
NC Math 1 Percent Grade Level Proficient	60.6
Biology Denominator	41
Biology Percent College/Career Ready	46.3
Biology Percent Grade Level Proficient	65.9
English II Denominator	39
English II Percent College/Career Ready	59.0
English II Percent Grade Level Proficient	74.4
Grade 3 Math Denominator	145
Grade 3 Math Percent College/Career Ready	67.6
Grade 3 Math Percent Grade Level Proficient	83.4
Grade 4 Math Denominator	139
Grade 4 Math Percent College/Career Ready	32.4

Grade 4 Math Percent Grade Level Proficient	44.6
Grade 5 Math Denominator	137
Grade 5 Math Percent College/Career Ready	36.5
Grade 5 Math Percent Grade Level Proficient	46.7
Grade 6 Math Denominator	142
Grade 6 Math Percent College/Career Ready	43.7
Grade 6 Math Percent Grade Level Proficient	59.2
Grade 7 Math Denominator	145
Grade 7 Math Percent College/Career Ready	52.4
Grade 7 Math Percent Grade Level Proficient	62.1
Grade 8 Math Denominator	147
Grade 8 Math Percent College/Career Ready	34.7
Grade 8 Math Percent Grade Level Proficient	48.3
Grade 3 Reading Denominator	145
Grade 3 Reading Percent College/Career Ready	30.3
Grade 3 Reading Percent Grade Level Proficient	43.4
Grade 4 Reading Denominator	139

Grade 4 Reading Percent College/Career Ready	27.3
Grade 4 Reading Percent Grade Level Proficient	51.1
Grade 5 Reading Denominator	137
Grade 5 Reading Percent College/Career Ready	35.0
Grade 5 Reading Percent Grade Level Proficient	55.5
Grade 6 Reading Denominator	142
Grade 6 Reading Percent College/Career Ready	38.7
Grade 6 Reading Percent Grade Level Proficient	56.3
Grade 7 Reading Denominator	145
Grade 7 Reading Percent College/Career Ready	54.5
Grade 7 Reading Percent Grade Level Proficient	68.3
Grade 8 Reading Denominator	147
Grade 8 Reading Percent College/Career Ready	40.8
Grade 8 Reading Percent Grade Level Proficient	64.6
Grade 5 Science Denominator	137
Grade 5 Science Percent College/Career Ready	50.4
Grade 5 Science Percent Grade Level Proficient	68.6

Grade 8 Science Denominator	Grade 8 Science Percent College/Career Ready	Grade 8 Science Percent Grade Level Proficient
147	64.6	80.3

Sugar Creek Charter

 4101 N Tryon Street
 Charlotte, NC 28206
 (704)509-5470

 Grade Range: K-10
 Regular School
 Year-Round Calendar

 Charter and Non-District Affiliated
 Schools

<http://www.thesugarcreek.org/>

Title I

SCHOOL PERFORMANCE GRADE

Achievement Indicators	Score
Reading EOG Proficiency	59
Math EOG Proficiency	62
Science EOG Proficiency	70
English II Proficiency	67
Math I Proficiency	36
Biology Proficiency	44
The ACT Proficiency	.
ACT WorkKeys	.
4-Year Graduation Rate	.
Successful Completion of Math III	.

Growth Status

Met

	Score	Grade
Achievement	61	
Growth	78.6	
School Performance	64	C
EOG Reading	65	C
EOG Math	66	C

"." = < 5% of students; 95% = ≥ 95%

Formula for determining the School Performance Grade:

- 80 percent of the School Performance Grade is based on the school achievement score. The school achievement score is calculated using a composite method based on the points earned by a school on all of the tests measured for that school
- 20 percent of the School Performance Grade is based on academic growth
- If a school has met expected growth and inclusion of the school's growth score reduces the school's performance score and grade, a school may choose to use the school achievement score solely to calculate the performance score and grade

A+NG Schools: A+NG schools earned a score of 85-100 and do not have significant achievement or graduation gaps.

SCHOOL PERFORMANCE GRADING SCALE

Grade Range	Letter Grade
85-100	A
70-84	B
55-69	C
40-54	D
Below 40	F

SCHOOL PROFILE
School Size: The total number of students in this school and the average number of students in schools with similar grade ranges at the district and state levels.

Our School	1337
State	511

School Attendance: The average percentage of students who attend school daily.

Our School	94.6%
State	95.8%

Average Class Size: The average number of students enrolled in the "typical" K-8 classroom.

	Kindergarten	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8
Our School	21	24	25	23	23	19	19	21	22
State	19	19	19	19	20	21	21	22	21

**Legislation mandates that class sizes for grades 4-12 are not restricted.*
Average Course Size: The average number of students enrolled in the courses listed at the time of End-of-Course testing.

	English II	Math I	Biology
Our School	12	15	18
State	18	20	18

SCHOOL PERFORMANCE

Performance of Students on the NC End-of-Grade Tests: Percentage of Students at **Level 1 (Limited Command** of knowledge and skills)

LEVEL 1	Reading	Math	Science
Our School	14.8%	16.9%	14.0%
State	21.6%	24.0%	14.0%

N/A = < 5% of students; 95% = ≥ 95%

Performance of Students on the NC End-of-Grade Tests: Percentage of Students at **Level 2 (Partial Command** of knowledge and skills)

LEVEL 2	Reading	Math	Science
Our School	26.3%	21.3%	15.7%
State	21.5%	21.3%	13.3%

N/A = < 5% of students; 95% = ≥ 95%

Performance of Students on the NC End-of-Grade Tests: Percentage of Students at **Level 3 (Sufficient Command** of knowledge and skills)
Students performing at Level 3 are performing at grade level.

LEVEL 3	Reading	Math	Science
Our School	18.7%	13.5%	16.5%
State	11.2%	7.7%	9.6%

N/A = < 5% of students; 95% = ≥ 95%

Performance of Students on the NC End-of-Grade Tests: Percentage of Students at **Level 4 (Solid Command** of knowledge and skills)
Students scoring at Level 4 meet NC Standard for College-and Career-Readiness and are performing at or above grade level.

LEVEL 4	Reading	Math	Science
Our School	36.1%	37.5%	45.3%
State	34.5%	29.4%	42.1%

N/A = < 5% of students; 95% = ≥ 95%

Performance of Students on the NC End-of-Grade Tests: Percentage of Students at **Level 5 (Superior Command** of knowledge and skills)
Students scoring at Level 5 meet NC Standard for College-and Career-Readiness and are performing at or above grade level.

LEVEL 5	Reading	Math	Science
Our School	N/A	10.8%	8.5%
State	11.3%	17.6%	21.0%

N/A = < 5% of students; 95% = ≥ 95%

FIVE ACHIEVEMENT LEVELS

LEVEL 1: Limited Command of knowledge and skills

- Performing At or Above Grade Level: NO
- Meets N.C. Standard for College-and Career-Readiness: NO

LEVEL 2: Partial Command of knowledge and skills

- Performing At or Above Grade Level: NO
- Meets N.C. Standard for College-and Career-Readiness: NO

LEVEL 3: Sufficient Command of knowledge and skills

- Performing At or Above Grade Level: YES
- Meets N.C. Standard for College-and Career-Readiness: NO

LEVEL 4: Solid Command of knowledge and skills

- Performing At or Above Grade Level: YES
- Meets N.C. Standard for College-and Career-Readiness: YES

LEVEL 5: Superior Command of knowledge and skills

- Performing At or Above Grade Level: YES
- Meets N.C. Standard for College-and Career-Readiness: YES

What does the achievement level number mean?

Students scoring at Levels 1 and 2 will likely need additional help next year to succeed in that subject area. Students scoring at Level 3 are considered proficient for that grade level or course, but may still need some targeted help in the next grade or course. Students scoring at Levels 4 and 5 are ready for the next grade or course, and are also on a path to be prepared for college or a career by the time they graduate.

The reading and math End-of-Grade tests are administered in grades 3-8. The science End-of-Grade tests are administered in grades 5 and 8 only.

Summer Program for School Report Cards

This school's report card (School Performance Grades and EOG/EOC results) include test scores from a summer program administered after the conclusion of the school year.

SCHOOL PERFORMANCE, continued

Performance of Students on the NC End-of-Course Tests: Percentage of Students at **Level 1 (Limited Command** of knowledge and skills)

LEVEL 1	English II	Math I	Biology
Our School	16.7%	43.4%	22.2%
State	20.4%	25.0%	23.2%

N/A = < 5% of students; 95% = ≥ 95%

Performance of Students on the NC End-of-Course Tests: Percentage of Students at **Level 2 (Partial Command** of knowledge and skills)

LEVEL 2	English II	Math I	Biology
Our School	16.7%	20.8%	33.3%
State	20.8%	14.5%	21.2%

N/A = < 5% of students; 95% = ≥ 95%

Performance of Students on the NC End-of-Course Tests: Percentage of Students at **Level 3 (Sufficient Command** of knowledge and skills)
Students performing at Level 3 are performing at grade level.

LEVEL 3	English II	Math I	Biology
Our School	13.9%	24.5%	11.1%
State	9.2%	10.7%	8.3%

N/A = < 5% of students; 95% = ≥ 95%

Performance of Students on the NC End-of-Course Tests: Percentage of Students at **Level 4 (Solid Command** of knowledge and skills)
Students scoring at Level 4 meet NC Standard for College-and Career-Readiness and are performing at or above grade level.

LEVEL 4	English II	Math I	Biology
Our School	50.0%	9.4%	30.6%
State	43.9%	34.3%	31.5%

N/A = < 5% of students; 95% = ≥ 95%

Performance of Students on the NC End-of-Course Tests: Percentage of Students at **Level 5 (Superior Command** of knowledge and skills)
Students scoring at Level 5 meet NC Standard for College-and Career-Readiness and are performing at or above grade level.

LEVEL 5	English II	Math I	Biology
Our School	N/A	N/A	N/A
State	5.7%	15.6%	15.8%

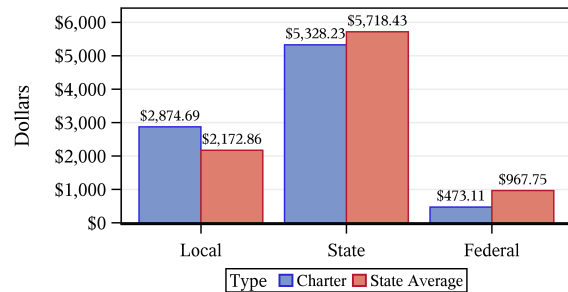
N/A = < 5% of students; 95% = ≥ 95%

Annual Participation Requirements: Schools are required to test at least 95 percent of their students on assessments administered for accountability. This requirement is for the all students group and for each student group. The minimum number of students needed in a group is 30.

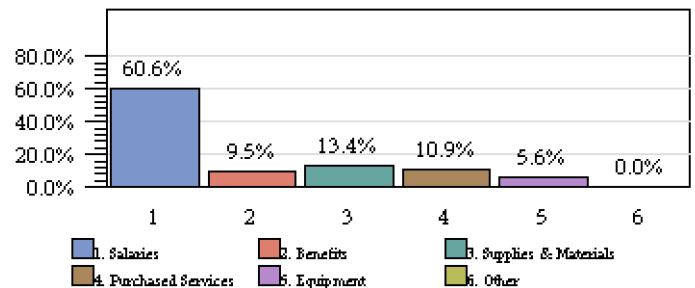
Our school met 19 out of 22 targets.

For more information on participation requirements please go to www.ncpublicschools.org/accountability/reporting.

FINANCIAL SUPPORT



Source of Funds (Amount per Student, Child Nutrition Included): Charter schools in North Carolina operate with funding from local, state, and federal sources. The financial support reflected in these numbers includes all categories of expenses for operating a charter school, including teacher and administrator salaries, textbooks, transportation, Career and Technical Education courses and other education supplies and materials.



Use of Funds: Education is a labor-intensive enterprise, as reflected in the accompanying chart. Salaries for teachers and other staff are usually the largest expense in a charter school. State and federal funds are generally allotted for specific purposes, services, or programs.

QUALITY TEACHERS

	Total Number of Classroom Teachers*	Fully Licensed Teachers**
Our School	78	70.5%
State	36	80.8%

* The total number of teachers in this school and the average number of teachers in schools with similar grade ranges at the district and state level.

** According to the charter school statute, a charter school is required to have a minimum of 50% of its teachers licensed.

Highly Qualified Teachers:
Percentage of classes taught by Highly Qualified teachers as defined by federal law.

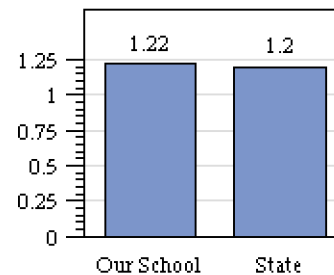
Our School	85.6%
State	82.0%

SAFE, ORDERLY AND CARING SCHOOLS

School Safety: The number of criminal acts reported per 100 students. Criminal acts include all acts occurring in school, on a school bus, on school grounds, or during off-campus, school-sponsored activities.

Our School	0.07
State	0.58

Access to Technology: The Number of Students per Internet-Connected Digital Learning Device



On this measure, smaller numbers are better than larger ones; there are more computers available to students when the number of students per computer is low.

READ TO ACHIEVE

The Read to Achieve program is a part of the Excellent Public Schools Act which became law in July of 2012 and applies to all schools at the beginning of the 2013-2014 school year. The goal of the State is to ensure that every student reads at or above grade level by the end of third grade. Students who are proficient on the 3rd-grade EOG or qualify for a "good cause exemption" are promoted to Grade 4. Students who are not proficient may be retained in 3rd grade or placed in 4th grade with extra reading instruction and interventions.

	PROMOTED TO GRADE 4		RETAINED	
	# of students	Percentage	# of Students	Percentage
Our School	115	76.7%	35	23.3%
State	104574	85.6%	17581	14.4%

"." = < 5% of students; 95% = ≥ 95%



PUBLIC SCHOOLS OF NORTH CAROLINA
State Board of Education | Department of Public Instruction

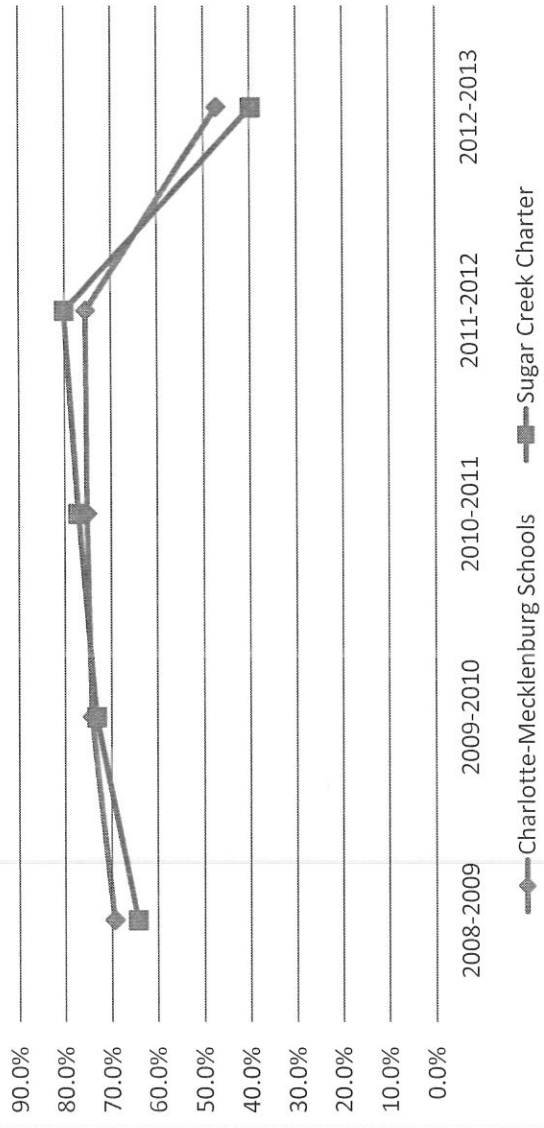
KEEPING YOU INFORMED

More information about your school is available on the NC School Report Cards website at: <http://www.ncpublicschools.org/src/>

2014 CHARTER SCHOOL RENEWAL

SCHOOL NAME: Sugar Creek Charter School		COUNTY: Mecklenburg			GRADES: K-8	
Academic Performance						
Year	Composite	Growth	AYP/AMOs	School Designation	Enrollment	
2015	62.2%	Not Met	Not Met	---	1401	
2014	52.2%	Exceeds	Not Met	---	1166	
2013	39.7%	Exceeds	Not met	---	965	
2012	80.1%	High	Met	School of Distinction	876	
2011	77.1%	High	Not met	School of Progress	741	
2010	73.2%	High	Met	School of Progress	670	
2009	64.3%	Expected	Met	School of Progress	611	
2012-2013 Percentage of Race of Total Population						
	American Indian	Asian	Hispanic	Black	White	Two or More Races
Charter School	0.1%	0.2%	2.9%	95.8%	0.4%	0.6%
LEA	0.4%	5.2%	18.4%	41.7%	31.7%	2.6%
North Carolina	1.8%	1.8%	9.4%	27.4%	56.3%	3.2%
2012-2013 Four-Year Cohort Graduation Rate						
Charter School	89.0%		Charter School	NA		Charter School
LEA	54.46%		LEA	NA		All Charter Mean
All LEA	58.73%		North Carolina	82.5%		All Charter Median
Current Noncompliance: None						
Office of Charter School Recommendation: The Office of Charter Schools recommends a 10 year renewal.						
Charter School Advisory Board Recommendation: The Charter School Advisory Board recommends a 10 year renewal.						

Sugar Creek Charter/Charlotte-Mecklenburg Schools Performance Composite Comparison



CHARTER SCHOOL RENEWAL VISITATION REPORT

School: Sugar Creek School

Location: Charlotte-Mecklenburg

Date of Visit: 3/5/13

Grades Served: K-8

Office of Charter School Consultants Present: Lisa Swinson and Cande Honeycutt

Administrator: Cheryl Turner

Current Enrollment: 968

Max ADM: 959

Time In: 10:30 a.m.

Time Out: 2:45 p.m.

Background and Purposes:

Sugar Creek received a 10 year charter renewal from the State Board of Education, effective from July 1, 2004- June 30, 2014. They were granted a ten year renewal.

As part of the renewal process for schools with charters expiring in June 2014, a site visit was performed by members of the Office of Charter Schools. Its purpose was to afford the team an opportunity to talk to parents, staff members, and the administrative team including board members. Through a series of questions, the team hoped to attain a broader picture of the school, particularly in terms of continuity and fulfillment of its mission, its ability to provide for the academic and other needs of its students and their parents, and the support and development of its current staff. Ms. Cheryl Turner, the Executive Director, was notified ahead of time about the visit and was allowed to choose the people to represent each of these groups. Ms. Lisa Swinson, the renewal team leader, requested that each group embody a cross section of experience. As an example, the team hoped for parents with diverse demographics as well as the length of time their children had attended the school. The team sought the same diversity variation in the staff members.

General Information:

Currently for the 2013-14 school year, Sugar Creek has 968 students enrolled with an ADM of 959. They have had an increase in student enrollment as evidenced by their "Best 1 of 2" in

2010 at 581, 2011 at 641 and 2012 at 711. Ms. Cheryl Turner is in her fourteenth year as the principal of Sugar Creek.

The Sugar Creek Charter School mission is the school was founded on the simple convictions that a first-rate education is the birthright of every individual, that all children can learn, and that every child should be challenged to reach his or her full potential. The overarching goals of the school are to:

- Demonstrate the heights of academic achievement that public school students can routinely attain when the advantages of charter school governance are coupled with the ambitious new academic standards.
- Offer area families rich new choices in public education
- Create new professional settings for teachers.

On-Site Activities:

Administration/Board Member Interviews: The renewal team met with eight administrative staff and two board members. When asked how the board guarantees the mission of the school the Board chair, Mr. Frank Martin, explained that the Board sets goals and objectives to do the best that they can for the children. Their goal is for ninety percent of the students to be at or above grade level. They further stated that the board does not deal with the day-to-day details of the school, but they do visit the school often. The administrative team explained that they focus on individualized learning for their students and all of their teachers have mentors. The administrative team is in the classroom daily and there is constant, immediate communication. Furthermore, the leadership staff meets at least twice per week with the teachers to ensure that they utilize individualized learning to meet their students' needs.

Board meetings usually last an hour to an hour and a half. The general format of the meetings includes a director's report, finance report, committee report, new business and old business. The board rarely has to go into closed session. Parents and guest usually do not attend the board meetings. There are eleven board members who do not deal with the day to day details of the school, but supports the school in its effort of 90% academic proficiency.

The administrative staff explained that there are several approaches to how staff development is provided to the school's staff. Sometimes the entire curriculum team will come together to plan trainings if it is for the entire staff. Other times, if it is team area or content then the curriculum leaders in those areas will be in charge of the training. The curriculum coordinator is in charge of monthly beginning teachers training.

Learning Focused is the curriculum framework that the school uses. OCS staff members observed the framework that included unit goals and vocabulary posted in all classrooms. Textbooks are not used. Teachers are observed using the NC Online Teacher Evaluation

Instrument and weekly walkthroughs are also utilized by curriculum leaders and peers. During walkthroughs, the curriculum leader uses a different observation tool that is based on the individual teacher's need. Additionally, the tool is reflective of professional development that the staff has received such as "Think Alouds". The curriculum leaders really believe that all of their students can learn as evidenced by bi-weekly meetings that are based on the needs of the school.

A weekly school-wide parent communication, "The Peak", is sent to each student. Teacher websites and parent telephone system are also utilized to communicate with parents. Teacher and administrators have begun to present at conferences to showcase the school. The school has plans to add high school during the next school year. They would also like to foster their relationship with UNC-Charlotte in which a doctoral fellow is writing a STEM curriculum.

Members of the administrative team and board made the following comments:

"The school has a family mentality. Students are treated like our own children and we have the flexibility to do whatever it takes."

"We are committed to every single child being successful."

"We are good at unconventional problem solving."

"Transportation really enhances the school program, as well as, expectations for children to be the best that they can be."

Parent Interviews: The renewal team met with five parents. These parents all expressed their overwhelming satisfaction with the school. They stated that the school is the best at communicating with parents. The staff calls before situations become issues. Each child's needs are met and students are treated as individuals both socially and academically.

The school has an online portal called Grade Link in which parents can check their child's grades daily. If a child needs additional help, the teacher gets in contact with the parents. Also, parents can drop-in or make an appointment to see the teacher. There is a weekly newsletter that is sent home that announces new teachers, teacher of the month, the percentage of students who passed a particular benchmark, pep rallies for achievement, and lots of other things. There is always something posted on the hallway walls and there is also information on the school's website. The school also utilizes a calling system. When there are parents meetings, food and child care are provided.

The school's grievance policy begins with the person with whom a parent has a question or issue with. It gets handled before it has to go to the top level. Internally the system works well and it is hard to argue with the process because it is solid.

Parents made the following comments related to the strengths of the school:

- “Academics are a [school] strength because everything is provided for them [students]. If they need extra help, they get it. If they are advanced, they get it. There is math offered on the weekends for grades 3-8 and students want to come”.
- “The whole student is put first, as well as, families. If a teacher is changed mid-year, it is explained that he/she was not good fit for the school”.
- “Cheryl Turner is the strength of the school because she understands the school, doesn’t make excuses and that makes a big difference:”
- “The school is like a big family because they roll out the red carpet for these kids”.
- “Transportation is offered through the entire county”.
- “The school is not perfect . . . but it is a well-oiled machine”.
- “I have never been rushed or turned away. If the person who I came to see was not available, someone else assisted me. That is the culture here at Sugar Creek”.

Staff interviews:

The renewal team met with five staff members who explained that the school leadership structure begins with Mrs. Cheryl Turner, who is the CEO. Additionally, there is an assistant CEO, curriculum facilitators and teachers. They also informed us that the school offers a lot of staff development that ranges from Technology to Behavior Management. The staff development usually starts with the entire staff and then begins to break off with grade levels or subject areas.

The teachers utilize the NC Common Core Standards. They received training during the DPI Summer Institutes. Lead teachers create interdisciplinary units, with the input of their team mates, and textbooks/programs are not used. The teachers find that having all the materials or resources that they need can sometimes be challenging, but the curriculum leaders find a way to get the teachers what they need. Teachers are required to differentiate instruction which is based on data. There is a variety of data that is collected for every student. Students are constantly being shuffled based on their data results. This system works well because the administrative staff gives them the flexibility to move students in and out of classrooms as needed.

Parents are communicated with every day. Certain students need constant communication regarding academics and behavior. There are three scheduled parent conferences throughout the school year. However, letters and work samples are sent home. Parents also utilize Grade Link to check student grades. Students in grades 3-8 have agendas and students in grades K-2 have a daily folder.

The administrative staff has constant communication with the teachers. They are constantly in the classrooms. They also send emails and there are weekly meetings. The NC Online Evaluation Instrument is used for formal observations. Also, weekly feedback is given during walkthroughs.

The teachers made the following comments:

- “Sugar Creek has a family atmosphere. The children are protected and they are loved”.
- “Excuses are not made”.
- “We encourage our students to do their best. They will learn and work hard”.
- “The camaraderie is a strength of the school. The school is out performing so many schools and the staff is responsible for it. We have competitions amongst ourselves”.
- “We have the freedom to try new ideas”.

Summary Comments:

1. Strong leadership team and board.
2. Currently compliant in all areas.

Sugar Creek Charter

Program Area	Area of Noncompliance
None	Currently compliant

Scope and Sequence for CMP2

Deep understanding of the concepts and skills are developed in the units listed. In some cases, the topics are introduced in one unit and more fully developed in a later unit. In other cases, the topics are revisited in the same or other units in Connections questions, or are used to develop understanding of new concepts. The development

of a concept includes understanding relationships among and between concepts, as well as developing skills, procedures, and algorithms.

As a problem solving curriculum, every unit helps students develop a variety of strategies for solving problems, such as building models, making lists and tables, drawing diagrams, and solving simpler problems.

Key: I = introduced M = mastered R = reinforced; applied

Number and Operations			
	Grade 6	Grade 7	Grade 8
Whole Numbers			
divisors, factors, greatest common factor	<i>Prime Time</i> IM <i>Bits and Pieces I</i> R <i>Shapes and Designs</i> R <i>Covering and Surrounding</i> R <i>Data About Us</i> R	<i>Variables and Patterns</i> R <i>Comparing and Scaling</i> R <i>Accentuate the Negative</i> R <i>Filling and Wrapping</i> R	<i>Thinking With Mathematical Models</i> R <i>Growing, Growing, Growing</i> R <i>Frogs, Fleas, and Painted Cubes</i> R <i>Say It with Symbols</i> R
divisibility rules	<i>Prime Time</i> IM		<i>Growing, Growing, Growing</i> R <i>Say It with Symbols</i> R
multiples, least common multiple	<i>Prime Time</i> IM <i>Bits and Pieces I</i> R <i>Bits and Pieces III</i> R <i>Data About Us</i> R	<i>Comparing and Scaling</i> R	
even, odd numbers	<i>Prime Time</i> IM	<i>Variables and Patterns</i> R	<i>Say It With Symbols</i> R
prime numbers	<i>Prime Time</i> IM	<i>Filling and Wrapping</i> R	<i>Growing, Growing, Growing</i> R <i>Say It with Symbols</i> R
composite numbers	<i>Prime Time</i> IM		
squares	<i>Prime Time</i> IM <i>Shapes and Designs</i> R	<i>Stretching and Shrinking</i> R	<i>Looking for Pythagoras</i> R <i>Frogs, Fleas, and Painted Cubes</i> R <i>Say It with Symbols</i> R
square roots	<i>Prime Time</i> I	<i>Stretching and Shrinking</i> I	<i>Looking for Pythagoras</i> IM
prime factorization	<i>Prime Time</i> IM <i>Shapes and Designs</i> R		<i>Growing, Growing, Growing</i> R
place value	<i>Prime Time</i> R <i>Bits and Pieces I</i> R	<i>Data Around Us</i> R <i>Data Distributions</i> R	
comparing	<i>Prime Time</i> R	<i>Variables and Patterns</i> R <i>Stretching and Shrinking</i> R <i>Comparing and Scaling</i> R <i>Data Distributions</i> R	<i>Thinking With Mathematical Models</i> R <i>Shapes of Algebra</i> R <i>Samples and Populations</i> R

Number and Operations (cont.)

	Grade 6	Grade 7	Grade 8
exponential form (notation)	<i>Prime Time</i> IM <i>Bits and Pieces</i> III R	<i>Variables and Patterns</i> R <i>Stretching and Shrinking</i> R <i>Accentuate the Negative</i> R	<i>Growing, Growing, Growing</i> R <i>Say It with Symbols</i> R <i>Shapes of Algebra</i> R
laws of exponents			<i>Growing, Growing, Growing</i> IM <i>Say It with Symbols</i> R
Decimals			
place value	<i>Bits and Pieces I</i> IM <i>Bits and Pieces</i> III R	<i>Data Distributions</i> R	<i>Looking for Pythagoras</i> R <i>Growing, Growing, Growing</i> R
models	<i>Bits and Pieces I</i> IM <i>Bits and Pieces</i> III R	<i>Comparing and Scaling</i> R <i>Stretching and Shrinking</i> R	<i>Looking for Pythagoras</i> R
on a number line	<i>Bits and Pieces I</i> IM <i>Bits and Pieces II</i> R <i>Bits and Pieces</i> III R <i>Data About Us</i> R	<i>Variables and Patterns</i> R <i>Comparing and Scaling</i> R <i>What Do You Expect?</i> R <i>Data Distributions</i> R	<i>Thinking With Mathematical Models</i> R <i>Looking for Pythagoras</i> R
comparing and ordering	<i>Bits and Pieces I</i> IM <i>Bits and Pieces II</i> R <i>Covering and Surrounding</i> R <i>Bits and Pieces</i> III R <i>How Likely Is It?</i> R	<i>Variables and Patterns</i> R <i>Comparing and Scaling</i> R <i>Accentuate the Negative</i> R <i>What Do You Expect?</i> R <i>Data Distributions</i> R	<i>Thinking With Mathematical Models</i> R <i>Looking for Pythagoras</i> R <i>Growing, Growing, Growing</i> R <i>Samples and Populations</i> R
related to fractions and percents	<i>Bits and Pieces I</i> IM <i>Bits and Pieces II</i> R <i>Bits and Pieces</i> III R <i>How Likely Is It?</i> R <i>Data About Us</i> R	<i>Stretching and Shrinking</i> R <i>Comparing and Scaling</i> R <i>Filling and Wrapping</i> R <i>Data Distributions</i> R	<i>Thinking With Mathematical Models</i> R <i>Looking for Pythagoras</i> R <i>Growing, Growing, Growing</i> R
terminating and repeating decimals	<i>Bits and Pieces</i> III IM		<i>Looking for Pythagoras</i> R
estimating/benchmarks	<i>Bits and Pieces I</i> IM <i>Bits and Pieces II</i> R <i>Bits and Pieces</i> III R	<i>Comparing and Scaling</i> R <i>Filling and Wrapping</i> R <i>Data Distributions</i> R	<i>Looking for Pythagoras</i> R
rounding	<i>Bits and Pieces I</i> IM <i>Bits and Pieces</i> III R <i>How Likely Is It?</i> R	<i>Filling and Wrapping</i> R <i>Data Distributions</i> R	<i>Looking for Pythagoras</i> R <i>Growing, Growing, Growing</i> R
scientific notation			<i>Growing, Growing, Growing</i> IM
operations with	<i>Bits and Pieces</i> III IM <i>How Likely Is It?</i> R <i>Data About Us</i> R	<i>Stretching and Shrinking</i> R <i>Accentuate the Negative</i> R <i>Moving Straight Ahead</i> R <i>Filling and Wrapping</i> R <i>What Do You Expect?</i> R <i>Data Distributions</i> R	<i>Thinking With Mathematical Models</i> R <i>Looking for Pythagoras</i> R <i>Growing, Growing, Growing</i> R <i>Samples and Populations</i> R

Number and Operations (cont.)

	Grade 6	Grade 7	Grade 8
Fractions			
comparing and ordering	<i>Bits and Pieces I</i> IM <i>Shapes and Designs R</i> <i>Bits and Pieces II</i> R <i>Covering and Surrounding R</i> <i>Bits and Pieces III</i> R <i>How Likely Is It?</i> R	<i>Variables and Patterns</i> R <i>Comparing and Scaling</i> R <i>Accentuate the Negative</i> R <i>What Do You Expect?</i> R <i>Data Distributions</i> R	<i>Thinking With Mathematical Models</i> R <i>Looking for Pythagoras</i> R <i>Growing, Growing, Growing R</i> <i>Shapes of Algebra</i> R <i>Samples and Populations</i> R
related to decimals and percents	<i>Bits and Pieces I</i> IM <i>Bits and Pieces II</i> R <i>Bits and Pieces III</i> R <i>How Likely Is It?</i> R <i>Data About Us</i> R	<i>Stretching and Shrinking</i> R <i>Comparing and Scaling</i> R <i>What Do You Expect?</i> R <i>Data Distributions</i> R	<i>Thinking With Mathematical Models</i> R <i>Looking for Pythagoras</i> R <i>Growing, Growing, Growing R</i>
equivalent	<i>Bits and Pieces I</i> IM <i>Shapes and Designs R</i> <i>Bits and Pieces II</i> R <i>Bits and Pieces III</i> R <i>How Likely Is It?</i> R	<i>Stretching and Shrinking</i> R <i>Comparing and Scaling</i> R <i>What Do You Expect?</i> R	<i>Growing, Growing, Growing R</i> <i>Samples and Populations</i> R
estimating/benchmarks	<i>Bits and Pieces I</i> IM <i>Bits and Pieces II</i> R <i>Bits and Pieces III</i> R <i>How Likely Is It?</i> R	<i>Comparing and Scaling</i> R <i>What Do You Expect?</i> R <i>Data Distributions</i> R	<i>Samples and Populations</i> R
models	<i>Bits and Pieces I</i> IM <i>Shapes and Designs R</i> <i>Bits and Pieces II</i> R <i>Bits and Pieces III</i> R <i>How Likely Is It?</i> R	<i>Comparing and Scaling</i> R <i>Filling and Wrapping</i> R <i>What Do You Expect?</i> R	<i>Thinking With Mathematical Models</i> R <i>Looking for Pythagoras</i> R
reciprocals	<i>Bits and Pieces II</i> IM	<i>Moving Straight Ahead</i> R	<i>Thinking With Mathematical Models</i> R
operations with	<i>Bits and Pieces I</i> I <i>Shapes and Designs I</i> <i>Bits and Pieces II</i> IM <i>Covering and Surrounding R</i> <i>Bits and Pieces III</i> R <i>How Likely Is It?</i> R <i>Data About Us</i> R	<i>Variables and Patterns</i> R <i>Stretching and Shrinking</i> R <i>Accentuate the Negative</i> R <i>Moving Straight Ahead</i> R <i>Filling and Wrapping</i> R <i>What Do You Expect?</i> R <i>Data Distributions</i> R	<i>Thinking With Mathematical Models</i> R <i>Looking for Pythagoras</i> R <i>Growing, Growing, Growing R</i> <i>Say It with Symbols</i> R
Ratio and Proportion			
ratios, rates, unit rates	<i>Bits and Pieces I</i> I <i>Shapes and Designs I</i> <i>Bits and Pieces II</i> I <i>Bits and Pieces III</i> I <i>How Likely Is It?</i> I <i>Data About Us</i> I	<i>Variables and Patterns</i> I <i>Stretching and Shrinking</i> I <i>Comparing and Scaling</i> IM <i>Moving Straight Ahead</i> R <i>Filling and Wrapping</i> R <i>Data Distributions</i> R	<i>Thinking With Mathematical Models</i> R <i>Looking for Pythagoras</i> R <i>Growing, Growing, Growing R</i> <i>Shapes of Algebra</i> R <i>Samples and Populations</i> R

Number and Operations (cont.)

	Grade 6	Grade 7	Grade 8
equivalent ratios	<i>Bits and Pieces I I</i> <i>Shapes and Designs I</i> <i>Bits and Pieces II I</i> <i>Bits and Pieces III I</i> <i>How Likely Is It? I</i>	<i>Stretching and Shrinking IM</i> <i>Comparing and Scaling R</i> <i>Moving Straight Ahead R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Looking for Pythagoras R</i> <i>Growing, Growing, Growing R</i> <i>Samples and Populations R</i>
proportions	<i>Bits and Pieces I I</i> <i>Bits and Pieces II I</i> <i>Bits and Pieces III I</i> <i>How Likely Is It? I</i>	<i>Stretching and Shrinking I</i> <i>Comparing and Scaling IM</i> <i>Moving Straight Ahead R</i>	
comparing proportional and nonproportional relationships	<i>Bits and Pieces I I</i> <i>Bits and Pieces III I</i> <i>How Likely Is It? I</i> <i>Data About Us I</i>	<i>Variables and Patterns I</i> <i>Stretching and Shrinking I</i> <i>Comparing and Scaling IM</i> <i>Moving Straight Ahead R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i>
scaling/scale factors	<i>Bits and Pieces I I</i> <i>Bits and Pieces III I</i> <i>How Likely Is It? I</i>	<i>Stretching and Shrinking IM</i> <i>Comparing and Scaling R</i> <i>What Do You Expect? R</i>	<i>Thinking With Mathematical Models R</i> <i>Looking for Pythagoras R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i>
scale factors with similar 3-dimensional figures		<i>Filling and Wrapping IM</i>	
estimating	<i>Bits and Pieces I I</i> <i>Bits and Pieces III I</i> <i>How Likely Is It? I</i> <i>Data About Us I</i>	<i>Stretching and Shrinking I</i> <i>Comparing and Scaling IM</i> <i>Filling and Wrapping R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i>
proportional reasoning	<i>Bits and Pieces I I</i> <i>Bits and Pieces II I</i> <i>Bits and Pieces III I</i> <i>How Likely Is It? I</i>	<i>Variables and Patterns I</i> <i>Stretching and Shrinking I</i> <i>Comparing and Scaling IM</i> <i>Moving Straight Ahead R</i> <i>Filling and Wrapping R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Looking for Pythagoras R</i> <i>Growing, Growing, Growing R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i>
Percents			
related to fractions and decimals	<i>Bits and Pieces I IM</i> <i>Bits and Pieces II R</i> <i>Bits and Pieces III R</i> <i>How Likely Is It? R</i> <i>Data About Us R</i>	<i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Say It with Symbols R</i> <i>Samples and Populations R</i>

Number and Operations (cont.)			
	Grade 6	Grade 7	Grade 8
models	<i>Bits and Pieces I IM</i> <i>Bits and Pieces III R</i> <i>How Likely Is It? R</i>	<i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>What Do You Expect? R</i>	<i>Samples and Populations R</i>
estimating/benchmarks	<i>Bits and Pieces I IM</i> <i>Bits and Pieces II R</i> <i>Bits and Pieces III R</i> <i>How Likely Is It? R</i> <i>Data About Us R</i>	<i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Samples and Populations R</i>
finding	<i>Bits and Pieces I I</i> <i>Bits and Pieces III IM</i> <i>How Likely Is It? R</i> <i>Data About Us R</i>	<i>Variables and Patterns R</i> <i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>Moving Straight Ahead R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Growing, Growing, Growing R</i> <i>Shapes of Algebra R</i> <i>Samples and Populations R</i>
percent of a number	<i>Bits and Pieces I I</i> <i>Bits and Pieces III IM</i> <i>How Likely Is It? R</i> <i>Data About Us R</i>	<i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>Moving Straight Ahead R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Growing, Growing, Growing R</i> <i>Say It with Symbols R</i> <i>Samples and Populations R</i>
solving problems with	<i>Bits and Pieces III IM</i> <i>How Likely Is It? R</i>	<i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Growing, Growing, Growing R</i> <i>Say It with Symbols R</i> <i>Samples and Populations R</i>
Integers			
models	<i>Bits and Pieces II I</i>	<i>Accentuate the Negative IM</i> <i>Data Distributions R</i>	
opposites/inverse operations		<i>Accentuate the Negative IM</i> <i>Moving Straight Ahead R</i>	<i>Thinking With Mathematical Models R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i>
absolute value		<i>Accentuate the Negative IM</i>	<i>Thinking With Mathematical Models R</i>
comparing and ordering		<i>Accentuate the Negative IM</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Shapes of Algebra R</i>
on a number line	<i>Bits and Pieces II I</i>	<i>Accentuate the Negative IM</i> <i>What Do You Expect? R</i>	<i>Thinking With Mathematical Models R</i>
operations with		<i>Accentuate the Negative IM</i> <i>Moving Straight Ahead R</i> <i>What Do You Expect? R</i>	<i>Thinking With Mathematical Models R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i>
solving problems with	<i>Bits and Pieces II I</i>	<i>Accentuate the Negative IM</i>	<i>Say It with Symbols R</i>

Number and Operations (cont.)			
	Grade 6	Grade 7	Grade 8
Irrational Numbers			
models	<i>Covering and Surrounding I How Likely Is It? I</i>	<i>Filling and Wrapping I</i>	<i>Looking for Pythagoras IM</i>
pi	<i>Covering and Surrounding IM Bits and Pieces III R How Likely Is It? R</i>	<i>Variables and Patterns R Filling and Wrapping R</i>	<i>Looking for Pythagoras R</i>
Pythagorean Theorem			<i>Looking for Pythagoras IM Shapes of Algebra R</i>
square roots			<i>Looking for Pythagoras IM Shapes of Algebra R</i>
estimating			<i>Looking for Pythagoras IM Shapes of Algebra R</i>
Real Numbers			
defined			<i>Looking for Pythagoras IM</i>
Order of Operations	<i>Prime Time I</i>	<i>Accentuate the Negative IM Moving Straight Ahead R</i>	<i>Thinking With Mathematical Models R Frogs, Fleas, and Painted Cubes R Say It with Symbols R</i>
Properties			
distributive	<i>Bits and Pieces II I Covering and Surrounding I Bits and Pieces III I</i>	<i>Accentuate the Negative IM Moving Straight Ahead R</i>	<i>Frogs, Fleas, and Painted Cubes R Say It with Symbols R</i>
commutative	<i>Prime Time I</i>	<i>Accentuate the Negative IM Moving Straight Ahead R</i>	<i>Say It with Symbols R</i>
associative		<i>Accentuate the Negative I</i>	<i>Say It with Symbols IM</i>
Data Analysis and Probability			
Data Investigation			
Note: Opportunities for students to question, collect, analyze, and interpret data occur in almost every unit.			
collecting data	<i>How Likely Is It? I Data About Us IM</i>	<i>Variables and Patterns R Moving Straight Ahead R Filling and Wrapping R What Do You Expect? R Data Distributions R</i>	<i>Thinking with Mathematical Models R Looking for Pythagoras R Growing, Growing, Growing R Samples and Populations R</i>

Data Analysis and Probability (cont.)			
	Grade 6	Grade 7	Grade 8
analyze data	<i>Bits and Pieces III I</i> <i>How Likely Is It? I</i> <i>Data About Us IM</i>	<i>Variables and Patterns R</i> <i>Comparing and Scaling R</i> <i>Moving Straight Ahead R</i> <i>Filling and Wrapping R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Thinking with Mathematical Models R</i> <i>Looking for Pythagoras R</i> <i>Growing, Growing, Growing R</i> <i>Samples and Populations R</i>
interpret data	<i>Bits and Pieces III I</i> <i>How Likely Is It? I</i> <i>Data About Us IM</i>	<i>Variables and Patterns R</i> <i>Comparing and Scaling R</i> <i>Moving Straight Ahead R</i> <i>Filling and Wrapping R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Thinking with Mathematical Models R</i> <i>Looking for Pythagoras R</i> <i>Growing, Growing, Growing R</i> <i>Samples and Populations R</i>
samples	<i>How Likely Is It? I</i> <i>Data About Us I</i>	<i>What Do You Expect? I</i>	<i>Samples and Populations IM</i>
randomness	<i>How Likely Is It? IM</i>	<i>What Do You Expect? R</i>	<i>Samples and Populations R</i>
draw conclusions/make predictions	<i>How Likely Is It? I</i> <i>Data About Us IM</i>	<i>What Do You Expect? R</i> <i>Comparing and Scaling R</i> <i>Moving Straight Ahead R</i> <i>Filling and Wrapping R</i> <i>Data Distributions R</i>	<i>Thinking with Mathematical Models R</i> <i>Looking for Pythagoras R</i> <i>Growing, Growing, Growing R</i> <i>Samples and Populations R</i>
compare data	<i>How Likely Is It? I</i> <i>Data About Us I</i>	<i>Variables and Patterns I</i> <i>Comparing and Scaling I</i> <i>Moving Straight Ahead I</i> <i>Filling and Wrapping R</i> <i>What Do You Expect? I</i> <i>Data Distributions IM</i>	<i>Thinking with Mathematical Models R</i> <i>Samples and Populations R</i>
conduct surveys	<i>How Likely Is It? I</i> <i>Data About Us I</i>	<i>Data Distributions I</i>	<i>Samples and Populations R</i>
evaluate methods of sampling	<i>How Likely Is It? I</i> <i>Data About Us I</i>	<i>What Do You Expect? I</i> <i>Data Distributions I</i>	<i>Samples and Populations IM</i>
Data Representation Note: Opportunities for students to create or use tables occur in almost every unit.			
line plots	<i>How Likely Is It? I</i> <i>Data About Us IM</i>	<i>Variables and Patterns R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Samples and Populations R</i>
single, double, stacked bar graphs	<i>Bits and Pieces I I</i> <i>Bits and Pieces III I</i> <i>How Likely Is It? I</i> <i>Data About Us IM</i>	<i>Comparing and Scaling R</i> <i>Data Distributions R</i>	<i>Growing, Growing, Growing R</i> <i>Shapes of Algebra R</i> <i>Samples and Populations R</i>
stem-and-leaf plots	<i>Data About Us IM</i>	<i>Data Distributions R</i>	<i>Samples and Populations R</i>

Data Analysis and Probability (cont.)

	Grade 6	Grade 7	Grade 8
coordinate graphs	<i>Covering and Surrounding I Data About Us I</i>	<i>Variables and Patterns IM Moving Straight Ahead R Filling and Wrapping R Data Distributions R</i>	<i>Thinking with Mathematical Models R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It With Symbols R Shapes of Algebra R Samples and Populations R</i>
tables	<i>Shapes and Designs R Covering and Surrounding I Data About Us IM</i>	<i>Variables and Patterns IM Comparing and Scaling R Moving Straight Ahead R Filling and Wrapping R Data Distributions R</i>	<i>Thinking with Mathematical Models R Looking for Pythagoras R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It With Symbols R Samples and Populations R</i>
frequency tables	<i>Data About Us IM How Likely Is It? R</i>	<i>Comparing and Scaling R Data Distributions R</i>	
circle graphs (pie charts)	<i>Bits and Pieces III IM Data About Us R</i>	<i>Data Distributions R</i>	<i>Shapes of Algebra R Samples and Populations R</i>
histograms			<i>Samples and Populations IM</i>
box-and-whisker plots (box plots)			<i>Samples and Populations IM</i>
scatter plots	<i>Data About Us I</i>	<i>Data Distributions IM</i>	<i>Thinking with Mathematical Models R Samples and Populations R</i>
analyze trends/trend lines	<i>Data About Us I</i>	<i>Variables and Patterns I Comparing and Scaling I Moving Straight Ahead I Data Distributions I</i>	<i>Thinking with Mathematical Models IM Samples and Populations R</i>
decide on appropriateness and effectiveness	<i>Bits and Pieces III I How Likely Is It? I Data About Us IM</i>	<i>Comparing and Scaling R Data Distributions R</i>	<i>Samples and Populations R</i>
Describing Data			
mode	<i>Data About Us IM</i>	<i>Data Distributions R</i>	<i>Samples and Populations R</i>
median	<i>Data About Us IM</i>	<i>Variables and Patterns R Accentuate the Negative R Data Distributions R</i>	<i>Samples and Populations R</i>
mean (average)	<i>Bits and Pieces III I Data About Us IM</i>	<i>Variables and Patterns R Accentuate the Negative R Data Distributions R</i>	<i>Thinking with Mathematical Models IM Samples and Populations R</i>
range	<i>Data About Us IM</i>	<i>Accentuate the Negative R Data Distributions R</i>	<i>Samples and Populations R</i>

Data Analysis and Probability (cont.)			
	Grade 6	Grade 7	Grade 8
outliers	<i>Data About Us I</i>	<i>Data Distributions I</i>	<i>Samples and Populations IM</i>
choose the best data descriptor	<i>Data About Us IM</i>	<i>Data Distributions R</i>	<i>Samples and Populations R</i>
shape of data	<i>Data About Us I</i>	<i>Data Distributions IM</i>	<i>Samples and Populations R</i>
data distribution	<i>Data About Us I</i>	<i>Data Distributions IM</i>	<i>Samples and Populations R</i>
quartiles, interquartile range (IQR)			<i>Samples and Populations IM</i>
maximum, minimum	<i>Covering and Surrounding I</i>	<i>Data Distributions IM</i>	<i>Frogs, Fleas, and Painted Cubes R</i> <i>Samples and Populations R</i>
Probability			
predicting, computing	<i>How Likely Is It? IM</i>	<i>Variables and Patterns R</i> <i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Shapes of Algebra R</i> <i>Samples and Populations R</i>
equally and unequally likely outcomes	<i>How Likely Is It? IM</i>	<i>What Do You Expect? R</i>	<i>Shapes of Algebra R</i>
certain, possible, impossible events	<i>How Likely Is It? IM</i>	<i>What Do You Expect? R</i>	
experimental	<i>How Likely Is It? IM</i>	<i>Variables and Patterns R</i> <i>Comparing and Scaling R</i> <i>What Do You Expect? R</i>	
theoretical	<i>How Likely Is It? IM</i>	<i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>What Do You Expect? R</i>	
dependent and independent events		<i>What Do You Expect? IM</i>	
expected value	<i>How Likely Is It? I</i>	<i>What Do You Expect? IM</i>	
fair and unfair games	<i>How Likely Is It? IM</i>	<i>What Do You Expect? R</i>	
lists, charts, tree diagrams, area models	<i>How Likely Is It? I</i>	<i>Variables and Patterns I</i> <i>Stretching and Shrinking I</i> <i>Comparing and Scaling I</i> <i>What Do You Expect? IM</i>	
counting techniques	<i>How Likely Is It? I</i>	<i>What Do You Expect? IM</i>	<i>Say It with Symbols R</i>
simulations/experiments	<i>How Likely Is It? IM</i>	<i>Variables and Patterns R</i> <i>Moving Straight Ahead R</i> <i>What Do You Expect? R</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Samples and Populations R</i>

Measurement			
	Grade 6	Grade 7	Grade 8
Angles			
estimating	<i>Shapes and Designs IM Bits and Pieces III R How Likely Is It? R</i>	<i>Variables and Patterns R Stretching and Shrinking R Comparing and Scaling R Data Distributions R</i>	<i>Looking for Pythagoras R Kaleidoscopes, Hubcaps, and Mirrors R</i>
measuring	<i>Shapes and Designs IM Bits and Pieces III R How Likely Is It? R</i>	<i>Stretching and Shrinking R Comparing and Scaling R</i>	<i>Looking for Pythagoras R Kaleidoscopes, Hubcaps, and Mirrors R</i>
of similar polygons		<i>Stretching and Shrinking IM Comparing and Scaling R</i>	<i>Looking for Pythagoras R Kaleidoscopes, Hubcaps, and Mirrors R</i>
triangle, special right			<i>Looking for Pythagoras IM</i>
Perimeter			
polygons	<i>Shapes and Designs I Covering and Surrounding IM Bits and Pieces III R</i>	<i>Variables and Patterns R Stretching and Shrinking R Moving Straight Ahead R Filling and Wrapping R</i>	<i>Thinking With Mathematical Models R Looking for Pythagoras R Frogs, Fleas, and Painted Cubes R Kaleidoscopes, Hubcaps, and Mirrors R Say It with Symbols R Shapes of Algebra R</i>
circles (circumference)	<i>Covering and Surrounding IM Bits and Pieces III R</i>	<i>Variables and Patterns R Stretching and Shrinking R Moving Straight Ahead R Filling and Wrapping R</i>	<i>Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Kaleidoscopes, Hubcaps, and Mirrors R Say It with Symbols R Shapes of Algebra R</i>
irregular polygons	<i>Covering and Surrounding IM Bits and Pieces III R</i>	<i>Stretching and Shrinking R Filling and Wrapping R</i>	<i>Looking for Pythagoras R Kaleidoscopes, Hubcaps, and Mirrors R Say It with Symbols R</i>
constant perimeter, changing area	<i>Covering and Surrounding IM</i>	<i>Variables and Patterns R Moving Straight Ahead R</i>	<i>Thinking With Mathematical Models R Frogs, Fleas, and Painted Cubes R Say It with Symbols R</i>
relationships of perimeters of similar figures		<i>Stretching and Shrinking IM Comparing and Scaling R</i>	<i>Thinking With Mathematical Models R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Shapes of Algebra R</i>

Measurement (cont.)

	Grade 6	Grade 7	Grade 8
Area			
rectangles	<i>Prime Time I Bits and Pieces I I Shapes and Designs R Bits and Pieces II I Covering and Surrounding IM Bits and Pieces III R</i>	<i>Variables and Patterns R Stretching and Shrinking R Comparing and Scaling R Moving Straight Ahead R Filling and Wrapping R What Do You Expect? R</i>	<i>Thinking With Mathematical Models R Looking for Pythagoras R Frogs, Fleas, and Painted Cubes R Kaleidoscopes, Hubcaps, and Mirrors R Say It with Symbols R Shapes of Algebra R</i>
triangles	<i>Covering and Surrounding IM Bits and Pieces III R</i>	<i>Variables and Patterns R Stretching and Shrinking R Moving Straight Ahead R Filling and Wrapping R</i>	<i>Looking for Pythagoras R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Kaleidoscopes, Hubcaps, and Mirrors R Say It with Symbols R</i>
parallelograms	<i>Covering and Surrounding IM Bits and Pieces III R</i>	<i>Variables and Patterns R Stretching and Shrinking R Filling and Wrapping R</i>	<i>Frogs, Fleas, and Painted Cubes R Kaleidoscopes, Hubcaps, and Mirrors R</i>
circles	<i>Covering and Surrounding IM Bits and Pieces III R</i>	<i>Variables and Patterns R Stretching and Shrinking R Moving Straight Ahead R Filling and Wrapping R</i>	<i>Looking for Pythagoras R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Kaleidoscopes, Hubcaps, and Mirrors R Say It with Symbols R Shapes of Algebra R</i>
irregular polygons	<i>Bits and Pieces I I Bits and Pieces II I Covering and Surrounding IM Bits and Pieces III R</i>	<i>Stretching and Shrinking R Filling and Wrapping R</i>	<i>Thinking With Mathematical Models R Looking for Pythagoras R Kaleidoscopes, Hubcaps, and Mirrors R Say It with Symbols R Shapes of Algebra R</i>
trapezoids	<i>Covering and Surrounding I</i>		<i>Frogs, Fleas, and Painted Cubes IM Say It with Symbols R</i>
constant area, changing perimeter	<i>Covering and Surrounding IM</i>	<i>Variables and Patterns R</i>	<i>Thinking With Mathematical Models R Frogs, Fleas, and Painted Cubes R</i>

Measurement (cont.)

	Grade 6	Grade 7	Grade 8
relationships of areas of similar figures		<i>Stretching and Shrinking IM Comparing and Scaling R Moving Straight Ahead R Filling and Wrapping R What Do You Expect? R</i>	<i>Thinking With Mathematical Models R Looking for Pythagoras R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Kaleidoscopes, Hubcaps, and Mirrors R Shapes of Algebra R</i>
Volume			
models	<i>Data About Us R</i>	<i>Filling and Wrapping IM What Do You Expect? R</i>	<i>Frogs, Fleas, and Painted Cubes R</i>
cubes		<i>Filling and Wrapping IM What Do You Expect? R</i>	<i>Looking for Pythagoras R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R</i>
prisms		<i>Filling and Wrapping IM What Do You Expect? R</i>	<i>Thinking With Mathematical Models R Looking for Pythagoras R Frogs, Fleas, and Painted Cubes R</i>
cylinders		<i>Filling and Wrapping IM</i>	<i>Looking for Pythagoras R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Kaleidoscopes, Hubcaps, and Mirrors R Say It with Symbols R Shapes of Algebra R</i>
cones		<i>Filling and Wrapping IM</i>	<i>Thinking With Mathematical Models R Looking for Pythagoras R Say It with Symbols R</i>
pyramids		<i>Filling and Wrapping IM</i>	<i>Looking for Pythagoras R Say It with Symbols R</i>
spheres		<i>Filling and Wrapping IM</i>	<i>Say It with Symbols R</i>
irregular figures		<i>Filling and Wrapping IM</i>	<i>Say It with Symbols R</i>
similar figures and scale factors		<i>Filling and Wrapping IM</i>	

Measurement (cont.)

	Grade 6	Grade 7	Grade 8
effects when the dimensions of a solid are changed proportionally		<i>Filling and Wrapping</i> IM	<i>Thinking With Mathematical Models</i> R <i>Growing, Growing, Growing</i> R <i>Frogs, Fleas, and Painted Cubes</i> R
Surface Area			
flat patterns (nets) for solid figures	<i>Covering and Surrounding</i> R <i>How Likely Is It?</i> R	<i>Filling and Wrapping</i> IM	<i>Thinking With Mathematical Models</i> R <i>Looking for Pythagoras</i> R <i>Frogs, Fleas, and Painted Cubes</i> R <i>Kaleidoscopes, Hubcaps, and Mirrors</i> R <i>Say It with Symbols</i> R <i>Shapes of Algebra</i> R
models		<i>Filling and Wrapping</i> IM	<i>Thinking With Mathematical Models</i> R <i>Looking for Pythagoras</i> R
cubes		<i>Filling and Wrapping</i> IM	<i>Thinking With Mathematical Models</i> R <i>Frogs, Fleas, and Painted Cubes</i> R <i>Say It with Symbols</i> R
prisms		<i>Filling and Wrapping</i> IM	<i>Thinking With Mathematical Models</i> R <i>Looking for Pythagoras</i> R <i>Frogs, Fleas, and Painted Cubes</i> R <i>Say It with Symbols</i> R <i>Shapes of Algebra</i> R
cylinders		<i>Filling and Wrapping</i> IM	<i>Thinking With Mathematical Models</i> R <i>Frogs, Fleas, and Painted Cubes</i> R <i>Say It with Symbols</i> R <i>Shapes of Algebra</i> R
pyramids	<i>How Likely Is It?</i> I	<i>Filling and Wrapping</i> I	<i>Looking for Pythagoras</i> I
irregular figures			<i>Say It with Symbols</i> I
formulas		<i>Filling and Wrapping</i> IM	
Finding Missing Lengths			
similar figures using ratios or scale factor		<i>Stretching and Shrinking</i> IM <i>Comparing and Scaling</i> R <i>Moving Straight Ahead</i> R	<i>Thinking With Mathematical Models</i> R <i>Looking for Pythagoras</i> R <i>Kaleidoscopes, Hubcaps, and Mirrors</i> R

Measurement (cont.)			
	Grade 6	Grade 7	Grade 8
on a coordinate grid			<i>Looking for Pythagoras IM</i> <i>Shapes of Algebra R</i>
using the Pythagorean Theorem			<i>Looking for Pythagoras IM</i> <i>Growing, Growing, Growing R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i>
Indirect			
similar triangles		<i>Stretching and Shrinking IM</i> <i>Comparing and Scaling R</i>	<i>Looking for Pythagoras R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i>
solving problems with		<i>Stretching and Shrinking IM</i> <i>Comparing and Scaling R</i>	<i>Looking for Pythagoras R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i>
Units of Measure			
converting within the same measurement system	<i>Shapes and Designs R</i>	<i>Moving Straight Ahead R</i> <i>Filling and Wrapping R</i>	
converting among customary and metric		<i>Comparing and Scaling R</i> <i>Moving Straight Ahead R</i> <i>Data About Us R</i>	
Geometry			
Line			
parallel lines	<i>Shapes and Designs IM</i>	<i>Stretching and Shrinking R</i> <i>Moving Straight Ahead R</i>	<i>Looking for Pythagoras R</i> <i>Shapes of Algebra R</i>
perpendicular lines	<i>Shapes and Designs IM</i>	<i>Moving Straight Ahead R</i>	<i>Looking for Pythagoras R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i> <i>Shapes of Algebra R</i>
transversals	<i>Shapes and Designs IM</i>	<i>Stretching and Shrinking R</i>	<i>Kaleidoscopes, Hubcaps, and Mirrors R</i>
midpoints	<i>Shapes and Designs IM</i>	<i>Stretching and Shrinking R</i>	<i>Looking for Pythagoras R</i> <i>Shapes of Algebra R</i>
Angles			
classifying	<i>Shapes and Designs IM</i>		
congruent	<i>Shapes and Designs IM</i>	<i>Stretching and Shrinking R</i>	<i>Looking for Pythagoras R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i>

Geometry (cont.)

	Grade 6	Grade 7	Grade 8
complementary and supplementary		<i>Stretching and Shrinking</i> IM <i>Filling and Wrapping</i> R	
of a polygon	<i>Shapes and Designs</i> IM	<i>Variables and Patterns</i> R <i>Stretching and Shrinking</i> R	<i>Looking for Pythagoras</i> R <i>Kaleidoscopes, Hubcaps, and Mirrors</i> R
n-gon angle sum	<i>Shapes and Designs</i> IM <i>Bits and Pieces III</i> R	<i>Variables and Patterns</i> R <i>Moving Straight Ahead</i> R	<i>Kaleidoscopes, Hubcaps, and Mirrors</i> R <i>Shapes of Algebra</i> R
on a circular grid	<i>Shapes and Designs</i> IM		
Polygons			
properties of	<i>Shapes and Designs</i> IM		<i>Looking for Pythagoras</i> R <i>Kaleidoscopes, Hubcaps, and Mirrors</i> R <i>Shapes of Algebra</i> R
regular	<i>Shapes and Designs</i> IM	<i>Variables and Patterns</i> R <i>Moving Straight Ahead</i> R	
tilings/tessellations	<i>Shapes and Designs</i> IM	<i>Stretching and Shrinking</i> R	<i>Kaleidoscopes, Hubcaps, and Mirrors</i> R
diagonals	<i>Shapes and Designs</i> IM	<i>Variables and Patterns</i> R <i>Moving Straight Ahead</i> R	<i>Looking for Pythagoras</i> R <i>Growing, Growing, Growing</i> R <i>Frogs, Fleas, and Painted Cubes</i> R <i>Kaleidoscopes, Hubcaps, and Mirrors</i> R
triangles, classifying	<i>Shapes and Designs</i> IM	<i>Stretching and Shrinking</i> R <i>Moving Straight Ahead</i> R <i>Filling and Wrapping</i> R	<i>Looking for Pythagoras</i> R <i>Kaleidoscopes, Hubcaps, and Mirrors</i> R
quadrilaterals, classifying	<i>Shapes and Designs</i> IM	<i>Stretching and Shrinking</i> R <i>Moving Straight Ahead</i> R	<i>Looking for Pythagoras</i> R <i>Kaleidoscopes, Hubcaps, and Mirrors</i> R <i>Shapes of Algebra</i> R
similar		<i>Stretching and Shrinking</i> IM <i>Moving Straight Ahead</i> R <i>Filling and Wrapping</i> R	<i>Looking for Pythagoras</i> R <i>Growing, Growing, Growing</i> R <i>Kaleidoscopes, Hubcaps, and Mirrors</i> R <i>Shapes of Algebra</i> R
congruent	<i>Covering and Surrounding I</i> <i>How Likely Is It?</i> I	<i>Stretching and Shrinking</i> I	<i>Looking for Pythagoras</i> I <i>Kaleidoscopes, Hubcaps, and Mirrors</i> IM

Geometry (cont.)

	Grade 6	Grade 7	Grade 8
enlarging and shrinking (dilations)		<i>Stretching and Shrinking IM Moving Straight Ahead R</i>	<i>Looking for Pythagoras R Growing, Growing, Growing R Kaleidoscopes, Hubcaps, and Mirrors R Shapes of Algebra R</i>
drawing on coordinate grid		<i>Stretching and Shrinking IM Moving Straight Ahead R</i>	<i>Looking for Pythagoras R Kaleidoscopes, Hubcaps, and Mirrors R Shapes of Algebra R</i>
Pythagorean Theorem			<i>Looking for Pythagoras IM Say It with Symbols R</i>
Circles			
Relationship between radius/diameter/circumference	<i>Covering and Surrounding IM</i>	<i>Filling and Wrapping R</i>	<i>Looking for Pythagoras R Frogs, Fleas, and Painted Cubes R Kaleidoscopes, Hubcaps, and Mirrors R Shapes of Algebra R</i>
Three-Dimensional Figures			
cubes		<i>Filling and Wrapping IM</i>	<i>Thinking With Mathematical Models R Looking for Pythagoras R Frogs, Fleas, and Painted Cubes R</i>
prisms		<i>Filling and Wrapping IM</i>	<i>Looking for Pythagoras R</i>
cylinders/spheres/cones		<i>Filling and Wrapping IM</i>	<i>Looking for Pythagoras R Kaleidoscopes, Hubcaps, and Mirrors R</i>
pyramids		<i>Filling and Wrapping IM</i>	<i>Looking for Pythagoras R</i>
base plans/top, side, and front views		<i>Filling and Wrapping R</i>	<i>Frogs, Fleas, and Painted Cubes R</i>
spatial visualization	<i>Covering and Surrounding I How Likely Is It? I</i>	<i>Filling and Wrapping R</i>	<i>Thinking With Mathematical Models R Looking for Pythagoras R Frogs, Fleas, and Painted Cubes R Kaleidoscopes, Hubcaps, and Mirrors R Shapes of Algebra R</i>

Geometry (cont.)			
	Grade 6	Grade 7	Grade 8
Transformations			
reflections	<i>Shapes and Designs I</i>	<i>Accentuate the Negative I</i>	<i>Frogs, Fleas, and Painted Cubes I</i> <i>Kaleidoscopes, Hubcaps, and Mirrors IM</i> <i>Shapes of Algebra R</i>
rotations	<i>Shapes and Designs I</i>		<i>Kaleidoscopes, Hubcaps, and Mirrors IM</i>
translations		<i>Stretching and Shrinking I</i> <i>Accentuate the Negative I</i>	<i>Frogs, Fleas, and Painted Cubes I</i> <i>Kaleidoscopes, Hubcaps, and Mirrors IM</i> <i>Shapes of Algebra R</i>
combinations of transformations			<i>Kaleidoscopes, Hubcaps, and Mirrors IM</i>
symmetry	<i>Shapes and Designs IM</i>		<i>Frogs, Fleas, and Painted Cubes R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i> <i>Shapes of Algebra R</i>
constructing symmetric figures			<i>Kaleidoscopes, Hubcaps, and Mirrors IM</i> <i>Shapes of Algebra R</i>
dilations		<i>Stretching and Shrinking IM</i> <i>Accentuate the Negative R</i>	<i>Kaleidoscopes, Hubcaps, and Mirrors IM</i> <i>Shapes of Algebra R</i>
algebraic rules/properties for		<i>Stretching and Shrinking I</i>	<i>Kaleidoscopes, Hubcaps, and Mirrors IM</i>
on a coordinate plane	<i>Shapes and Designs I</i>	<i>Stretching and Shrinking I</i> <i>Accentuate the Negative I</i>	<i>Looking for Pythagoras I</i> <i>Kaleidoscopes, Hubcaps, and Mirrors IM</i> <i>Shapes of Algebra R</i>
Algebra			
Patterns			
look for and describe	<i>Covering and Surrounding I</i> <i>Data About Us I</i>	<i>Variables and Patterns IM</i> <i>Comparing and Scaling R</i> <i>Accentuate the Negative R</i> <i>Moving Straight Ahead R</i> <i>Filling and Wrapping R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Looking for Pythagoras R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Say It with Symbols R</i> <i>Samples and Populations R</i>

Algebra (cont.)

	Grade 6	Grade 7	Grade 8
numerical	<i>Covering and Surrounding I Data About Us I</i>	<i>Variables and Patterns IM Comparing and Scaling R Moving Straight Ahead R Filling and Wrapping R Data Distributions R</i>	<i>Thinking With Mathematical Models R Looking for Pythagoras R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It with Symbols R Samples and Populations R</i>
geometric	<i>Covering and Surrounding IM</i>	<i>Variables and Patterns R Accentuate the Negative R Filling and Wrapping R</i>	<i>Thinking With Mathematical Models R Frogs, Fleas, and Painted Cubes R Say It with Symbols R</i>
rates of change		<i>Variables and Patterns I Comparing and Scaling IM Accentuate the Negative R Moving Straight Ahead R Filling and Wrapping R</i>	<i>Thinking With Mathematical Models R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It with Symbols R</i>
rules	<i>Shapes and Designs I Covering and Surrounding I</i>	<i>Variables and Patterns IM Comparing and Scaling R Moving Straight Ahead R Filling and Wrapping R</i>	<i>Thinking With Mathematical Models R Looking for Pythagoras R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It with Symbols R Samples and Populations R</i>
analyzing and making predictions from	<i>Covering and Surrounding I</i>	<i>Variables and Patterns IM Comparing and Scaling R Moving Straight Ahead R Filling and Wrapping R Data Distributions R</i>	<i>Thinking With Mathematical Models R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It with Symbols R</i>
functions	<i>Covering and Surrounding I</i>	<i>Variables and Patterns IM Comparing and Scaling R Moving Straight Ahead R Filling and Wrapping R</i>	<i>Thinking With Mathematical Models R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It with Symbols R Samples and Populations R</i>
Variables/Expressions			
dependent, independent		<i>Variables and Patterns IM Moving Straight Ahead R</i>	<i>Thinking With Mathematical Models R</i>

Algebra (cont.)			
	Grade 6	Grade 7	Grade 8
coefficients		<i>Variables and Patterns I Comparing and Scaling I Moving Straight Ahead IM</i>	
like, constant, linear terms		<i>Variables and Patterns I Comparing and Scaling I Moving Straight Ahead IM</i>	<i>Thinking With Mathematical Models R Looking for Pythagoras R Frogs, Fleas, and Painted Cubes R Say It with Symbols R Shapes of Algebra R</i>
evaluating		<i>Variables and Patterns I Moving Straight Ahead IM</i>	<i>Thinking With Mathematical Models R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It with Symbols R Shapes of Algebra R</i>
equivalent		<i>Variables and Patterns I Moving Straight Ahead I</i>	<i>Growing, Growing, Growing I Frogs, Fleas, and Painted Cubes I Say It with Symbols IM Shapes of Algebra R</i>
factored form/ expanded form		<i>Accentuate the Negative IM Moving Straight Ahead R</i>	<i>Frogs, Fleas, and Painted Cubes R Say It with Symbols R</i>
Relationships			
continuous/ discrete		<i>Variables and Patterns IM Accentuate the Negative R</i>	<i>Thinking With Mathematical Models R</i>
linear	<i>Data About Us I</i>	<i>Variables and Patterns I Comparing and Scaling I Accentuate the Negative I Moving Straight Ahead IM Filling and Wrapping R Data Distributions R</i>	<i>Thinking With Mathematical Models R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It with Symbols R Shapes of Algebra R Samples and Populations R</i>
nonlinear	<i>Covering and Surrounding I Data About Us I</i>	<i>Variables and Patterns I Moving Straight Ahead I Filling and Wrapping I Data Distributions I</i>	<i>Thinking With Mathematical Models IM Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It with Symbols R Shapes of Algebra R</i>

Algebra (cont.)

	Grade 6	Grade 7	Grade 8
inverse		<i>Variables and Patterns I Moving Straight Ahead I</i>	<i>Thinking With Mathematical Models IM Frogs, Fleas, and Painted Cubes R Say It with Symbols R Shapes of Algebra R</i>
exponential growth/ exponential decay			<i>Growing, Growing, Growing IM Frogs, Fleas, and Painted Cubes R Say It with Symbols R Shapes of Algebra R</i>
quadratic	<i>Covering and Surrounding I</i>	<i>Filling and Wrapping I</i>	<i>Frogs, Fleas, and Painted Cubes IM Say It with Symbols R Shapes of Algebra R</i>
slope		<i>Variables and Patterns I Moving Straight Ahead IM</i>	<i>Thinking With Mathematical Models R Looking for Pythagoras R Growing, Growing, Growing R Shapes of Algebra R</i>
slopes of perpendicular lines/parallel lines		<i>Moving Straight Ahead IM</i>	<i>Looking for Pythagoras R Shapes of Algebra R</i>
Equations, Linear			
tables for		<i>Variables and Patterns I Comparing and Scaling I Moving Straight Ahead IM</i>	<i>Thinking With Mathematical Models R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Shapes of Algebra R</i>
graphs for		<i>Variables and Patterns I Comparing and Scaling I Accentuate the Negative I Moving Straight Ahead IM</i>	<i>Thinking With Mathematical Models R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It with Symbols R Shapes of Algebra R Samples and Populations R</i>
fitting to a graph		<i>Moving Straight Ahead IM Data Distributions R</i>	<i>Thinking With Mathematical Models R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It with Symbols R Shapes of Algebra R Samples and Populations R</i>

Algebra (cont.)

	Grade 6	Grade 7	Grade 8
Slope-intercept form $y = mx + b$		<i>Variables and Patterns I</i> <i>Moving Straight Ahead IM</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i> <i>Samples and Populations R</i>
Standard form $ax + by = c$			<i>Shapes of Algebra IM</i>
writing		<i>Variables and Patterns IM</i> <i>Comparing and Scaling R</i> <i>Moving Straight Ahead R</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i> <i>Samples and Populations R</i>
solving with tables		<i>Variables and Patterns I</i> <i>Comparing and Scaling I</i> <i>Moving Straight Ahead IM</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i>
solving by graphing		<i>Variables and Patterns I</i> <i>Comparing and Scaling I</i> <i>Moving Straight Ahead IM</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i>
solving symbolically		<i>Variables and Patterns I</i> <i>Moving Straight Ahead IM</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i>
solving with graphing calculator		<i>Variables and Patterns I</i> <i>Moving Straight Ahead IM</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Say It with Symbols R</i>

Algebra (cont.)

	Grade 6	Grade 7	Grade 8
solving systems of		<i>Variables and Patterns I Moving Straight Ahead I</i>	<i>Thinking With Mathematical Models I Frogs, Fleas, and Painted Cubes I Say It with Symbols I Shapes of Algebra IM</i>
formulate given a problem situation (and vice versa)		<i>Variables and Patterns I Comparing and Scaling I Moving Straight Ahead IM</i>	<i>Thinking With Mathematical Models R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It with Symbols R Shapes of Algebra R Samples and Populations R</i>
Equations, Quadratic			
writing			<i>Frogs, Fleas, and Painted Cubes IM Say It with Symbols R</i>
graphs for	<i>Covering and Surrounding I</i>	<i>Variables and Patterns I Moving Straight Ahead I</i>	<i>Frogs, Fleas, and Painted Cubes IM Say It with Symbols R Shapes of Algebra R</i>
solving			<i>Frogs, Fleas, and Painted Cubes I Say It with Symbols IM Shapes of Algebra R</i>
finding roots			<i>Frogs, Fleas, and Painted Cubes I Say It with Symbols IM Shapes of Algebra R</i>
inequalities			<i>Shapes of Algebra I</i>
Equations, Nonlinear			
models		<i>Variables and Patterns I Moving Straight Ahead I</i>	<i>Thinking With Mathematical Models IM Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R</i>
cubic			<i>Thinking With Mathematical Models I Frogs, Fleas, and Painted Cubes I Say It with Symbols I</i>

Algebra (cont.)			
	Grade 6	Grade 7	Grade 8
exponential		<i>Variables and Patterns I</i>	<i>Thinking With Mathematical Models I</i> <i>Growing, Growing, Growing IM</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i>
inverse		<i>Variables and Patterns I</i> <i>Moving Straight Ahead I</i>	<i>Thinking With Mathematical Models IM</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i>
of circles			<i>Shapes of Algebra IM</i>
Graphing			
explore shapes of graphs	<i>Data About Us I</i>	<i>Variables and Patterns IM</i> <i>Comparing and Scaling R</i> <i>Moving Straight Ahead R</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i> <i>Samples and Populations R</i>
ordered pairs	<i>Data About Us I</i>	<i>Variables and Patterns IM</i> <i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>Accentuate the Negative R</i> <i>Moving Straight Ahead R</i>	<i>Thinking With Mathematical Models R</i> <i>Looking for Pythagoras R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i> <i>Shapes of Algebra R</i> <i>Samples and Populations R</i>
polar coordinates	<i>Shapes and Designs IM</i>		
equations		<i>Variables and Patterns I</i> <i>Comparing and Scaling I</i> <i>Moving Straight Ahead IM</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Say It with Symbols R</i> <i>Samples and Populations R</i>
inequalities		<i>Variables and Patterns I</i> <i>Moving Straight Ahead I</i>	<i>Thinking With Mathematical Models I</i> <i>Say It with Symbols I</i> <i>Shapes of Algebra IM</i>
systems of linear inequalities			<i>Shapes of Algebra IM</i>

Algebra (cont.)

	Grade 6	Grade 7	Grade 8
using a table	<i>Covering and Surrounding I Data About Us I</i>	<i>Variables and Patterns IM Comparing and Scaling R Moving Straight Ahead R</i>	<i>Thinking With Mathematical Models R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R</i>
with a graphing calculator		<i>Variables and Patterns IM Moving Straight Ahead R</i>	<i>Thinking With Mathematical Models R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It with Symbols R</i>
slope		<i>Variables and Patterns I Comparing and Scaling I Moving Straight Ahead IM</i>	<i>Thinking With Mathematical Models R Growing, Growing, Growing R Say It with Symbols R Shapes of Algebra R Samples and Populations R</i>
x-intercept		<i>Variables and Patterns I Moving Straight Ahead IM</i>	<i>Frogs, Fleas, and Painted Cubes R Say It with Symbols R Shapes of Algebra R Samples and Populations R</i>
y-intercept		<i>Variables and Patterns I Moving Straight Ahead IM</i>	<i>Thinking With Mathematical Models R Growing, Growing, Growing R Frogs, Fleas, and Painted Cubes R Say It with Symbols R Shapes of Algebra R</i>
maximum and minimum	<i>Covering and Surrounding I</i>	<i>Filling and Wrapping I</i>	<i>Frogs, Fleas, and Painted Cubes IM Say It with Symbols R</i>
systems of equations		<i>Variables and Patterns IM Moving Straight Ahead R</i>	<i>Thinking With Mathematical Models R Frogs, Fleas, and Painted Cubes R Shapes of Algebra R</i>

Problem Solving Skills

	Grade 6	Grade 7	Grade 8
Problem Solving Strategies As a problem solving curriculum, every unit helps students develop a variety of strategies for solving problems such as; building models, making lists and tables, drawing diagrams, and solving simpler problems.			
drawing a diagram	<i>Bits and Pieces I R</i> <i>Bits and Pieces II R</i> <i>Bits and Pieces III R</i> <i>How Likely Is It? R</i>	<i>Stretching and Shrinking R</i> <i>Accentuate the Negative R</i> <i>Filling and Wrapping R</i> <i>What Do You Expect? R</i>	<i>Thinking With Mathematical Models R</i> <i>Looking for Pythagoras R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i>
looking for a pattern	<i>Bits and Pieces I R</i> <i>Shapes and Designs R</i> <i>Bits and Pieces II R</i> <i>Covering and Surrounding R</i> <i>Bits and Pieces III R</i> <i>How Likely Is It? R</i> <i>Data About Us R</i>	<i>Variables and Patterns R</i> <i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>Moving Straight Ahead R</i> <i>Filling and Wrapping R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i> <i>Say It with Symbols R</i>
making a graph	<i>Covering and Surrounding R</i> <i>Data About Us R</i>	<i>Variables and Patterns R</i> <i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>Moving Straight Ahead R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Shapes of Algebra R</i> <i>Samples and Populations R</i>
making a table	<i>Shapes and Designs R</i> <i>Covering and Surrounding R</i> <i>Bits and Pieces III R</i> <i>Data About Us R</i>	<i>Variables and Patterns R</i> <i>Comparing and Scaling R</i> <i>Moving Straight Ahead R</i> <i>Filling and Wrapping R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Looking for Pythagoras R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Say It with Symbols R</i> <i>Samples and Populations R</i>
simulating a problem	<i>Prime Time IM</i> <i>Covering and Surrounding R</i> <i>How Likely Is It? R</i>	<i>Variables and Patterns R</i> <i>Moving Straight Ahead R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Samples and Populations R</i>
try, check, revise	<i>Prime Time IM</i> <i>Bits and Pieces I R</i> <i>Shapes and Designs R</i> <i>Bits and Pieces II R</i> <i>Bits and Pieces III R</i> <i>How Likely Is It? R</i> <i>Data About Us R</i>	<i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>Accentuate the Negative R</i> <i>Moving Straight Ahead R</i>	<i>Thinking With Mathematical Models R</i> <i>Looking for Pythagoras R</i> <i>Growing, Growing, Growing R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i> <i>Say It with Symbols R</i>

Problem Solving Skills (cont.)

	Grade 6	Grade 7	Grade 8
write an equation	<i>Shapes and Designs R</i> <i>Covering and Surrounding R</i>	<i>Variables and Patterns R</i> <i>Comparing and Scaling R</i> <i>Accentuate the Negative R</i> <i>Moving Straight Ahead R</i> <i>Filling and Wrapping R</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i>
Reasonableness			
justify answers	<i>Prime Time IM</i> <i>Bits and Pieces I R</i> <i>Bits and Pieces II R</i> <i>Bits and Pieces III R</i> <i>How Likely Is It? R</i> <i>Data About Us R</i>	<i>Variables and Patterns R</i> <i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>Accentuate the Negative R</i> <i>Moving Straight Ahead R</i> <i>Filling and Wrapping R</i> <i>What Do You Expect? R</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i> <i>Say It with Symbols R</i> <i>Samples and Populations R</i>
make and test conjectures	<i>Prime Time IM</i> <i>Bits and Pieces I R</i> <i>Shapes and Designs R</i> <i>Bits and Pieces II R</i> <i>Bits and Pieces III R</i> <i>How Likely Is It? R</i> <i>Data About Us R</i>	<i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>Accentuate the Negative R</i> <i>Moving Straight Ahead R</i> <i>Filling and Wrapping R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Looking for Pythagoras R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i> <i>Shapes of Algebra R</i> <i>Samples and Populations R</i>
reason from graphs	<i>Covering and Surrounding R</i> <i>Data About Us R</i>	<i>Variables and Patterns R</i> <i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>Accentuate the Negative R</i> <i>Moving Straight Ahead R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Shapes of Algebra R</i> <i>Samples and Populations R</i>
recognize patterns	<i>Bits and Pieces I R</i> <i>Shapes and Designs R</i> <i>Bits and Pieces II R</i> <i>Bits and Pieces III R</i> <i>How Likely Is It? R</i>	<i>Variables and Patterns R</i> <i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>Accentuate the Negative R</i> <i>Moving Straight Ahead R</i> <i>Filling and Wrapping R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i>
validate conclusions using mathematical properties	<i>Prime Time IM</i> <i>Bits and Pieces I R</i> <i>Shapes and Designs R</i> <i>Bits and Pieces II R</i> <i>Covering and Surrounding R</i> <i>Bits and Pieces III R</i> <i>How Likely Is It? R</i> <i>Data About Us R</i>	<i>Variables and Patterns R</i> <i>Stretching and Shrinking R</i> <i>Comparing and Scaling R</i> <i>Accentuate the Negative R</i> <i>Moving Straight Ahead R</i> <i>Filling and Wrapping R</i> <i>What Do You Expect? R</i> <i>Data Distributions R</i>	<i>Thinking With Mathematical Models R</i> <i>Looking for Pythagoras R</i> <i>Growing, Growing, Growing R</i> <i>Frogs, Fleas, and Painted Cubes R</i> <i>Kaleidoscopes, Hubcaps, and Mirrors R</i> <i>Say It with Symbols R</i> <i>Shapes of Algebra R</i> <i>Samples and Populations R</i>

Communication Student explanations are requested throughout in Problems, in the ACE, and in teacher questioning from the teacher's guides.

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Counting and Cardinality

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Counting and Cardinality (CC)							
Compare numbers	•						
Count by ones	•						
Count by tens	•						
Count objects	•						
Count sets of objects	•						
Find how many in all	•						
Use one-to-one correspondence to count	•						
Write numbers	•						

Number and Operations in Base Ten

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Number and Operations in Base Ten (NBT)							
Addition							
Add decimals						•	•
Add whole numbers		•	•	•	•		
Addition strategies		•	•	•			
Estimate decimal sums						•	
Estimation in 3-digit addition			•				
Properties of addition		•	•	♦	♦	•	•
Real-world problems						•	
Counting Sequence							
Count backward			•				
Count forward	•	•	•				
Model whole numbers	•	•	•				
Read whole numbers	•	•	•				
Skip count		•	•				
Write whole numbers	•	•	•				
Division							
Divide decimals						•	♦
Divide whole numbers			•			•	♦
Division strategies			•				
Remainders			•				

Number and Operations in Base Ten

... Continued

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Multiplication							
Area and array models					•		
Equations					•	♦	♦
Multiples of ten				•			
Multiplication strategies					•		
Multiply decimals						•	♦
Multiply whole numbers					•	•	
Properties of multiplication					•	♦	♦
Place Value of Decimals							
Compare and order decimals						•	
Decimal notation						•	
Read decimals						•	
Round decimals					•	•	
Write decimals in different forms						•	
Place Value of Whole Numbers							
Compare whole numbers		•	•	•	•		
Decompose into tens and ones	•	•					
Expanded form				•	•		
Exponents						•	♦
Make a ten		•					
Model whole numbers	•	•	•				
Order whole numbers					•		
Place-value models	•	•	•				
Powers of ten						•	♦
Subtraction							
Estimate decimal differences						•	
Estimation in 3-digit subtraction			•				
Real-world problems						•	
Subtract decimals						•	
Subtract whole numbers		•	•	•	•		
Subtraction strategies		•	•	•			

Number and Operations—Fractions

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Number and Operations—Fractions (NF)							
Addition with Fractions							
Add fractions					•	•	
Add mixed numbers					•	•	
Benchmark fractions						•	
Rename fractions and mixed numbers to add					•	♦	
Visual fraction models					•	♦	
Word problems					•	•	
Decimal Fractions							
Compare decimal fractions					•	•	
Decimal notation					•	•	
Equivalent fractions and decimals					•		
Money and decimals					•		
Place value of decimals					•	•	
Write decimals					•	•	
Division with Fractions							
Divide unit fractions						•	
Fractions as division						•	
Interpret division with fractions						•	
Real-world problems						•	♦
Visual fraction models						•	♦
Fraction Equivalence							
Common denominators					•	♦	
Compare and order fractions				•	•	♦	
Equivalent fractions				•	•	•	
Simplest form					•	♦	
On the number line				•	•	♦	
Use regions				•			
Multiplication with Fractions							
Distributive Property						•	
Find area of a rectangle with fractional measurements						•	
Multiples of unit fractions					•	•	
Multiply fractions					•	•	
Multiply mixed numbers					•	•	

Number and Operations—Fractions

... Continued

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Scale and multiplication of fractions						•	
Visual fraction models					•	•	
Word problems					•	•	
Read and Write Fractions							
Fractions				•			
Whole numbers as fractions				•			
Subtraction of Fractions							
Estimate differences						•	
Subtract fractions					•	•	
Subtract mixed numbers					•	•	
Subtraction with renaming					•	•	
Visual fraction models					•	•	
Word problems					•	•	
Understand Fractions							
Part of a group				•			
Part of a partitioned whole				•			
On the number line				•			
Unit fractions				•			
Whole numbers and fractions				•			

Ratios and Proportional Relationships

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Ratios and Proportional Relationships (RP)							
Concept of Ratio							
Fractions and ratio							•
Model ratios							•
Notation for ratio							•
Rate language							•
Write ratios							•
Rate and Ratio Reasoning							
Convert measurements							•
Distance, rate, time formula							•

Ratios and Proportional Relationships

... Continued

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Equivalent ratios							•
Percent							•
Real-world problems							•
Unit rate							•

The Number System

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
The Number System (NS)							
Addition and Subtraction of Decimals							
Add decimals							•
Subtract decimals							•
Common Factors and Multiples							
Greatest common factor							•
Least common multiple							•
Prime factorization							•
Division with Fractions							
Divide fractions							•
Divide mixed numbers							•
Reciprocal and inverse operations							•
Visual fraction models							•
Division with Whole Numbers and Decimals							
Divide decimals							•
Divide whole numbers							•
Multiplication							
Multiply decimals							•
Rational Numbers							
Absolute value							•
Compare and order rational numbers							•
Find distance							•
Graph on the coordinate plane							•
Negative and positive numbers							•
Opposites							•

The Number System

... Continued

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Plot on the number line							•
Real-world problems							•
Reflection on the axes							•

Operations and Algebraic Thinking

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Operations and Algebraic Thinking (OA)							
Addition							
Add whole numbers	•	•	•	•			
Addition strategies		•	•				
Additive comparison					•		
Basic facts		•	•	♦			
Decompose numbers	•	•					
Equal symbol	•	•					
Equations		•	•	•	•		
Estimate sums			•	•	♦		
Expressions	•						
Inverse of subtraction	•	•	♦				
Missing addend	•	•	♦				
Model addition	•	•	♦				
Multi-step word problems				•	•		
Plus symbol	•	•					
Real-world problems	•	•	•				
Three addends		•	•				
Word problems		•	•	•			
Write number sentences		•	•				
Division							
Basic facts			•	♦			
Division strategies			•	♦			
Equations			•	•			
Measurement quantities				•			
Model division				•			

Operations and Algebraic Thinking

... Continued

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Multi-step word problems					•	♦	
Relationship with multiplication				•	♦		
Remainders					•		
Strategies to divide				•	♦		
Understand division				•	•		
Factors and Multiples							
Common factors					•		♦
Common multiples					•		♦
Divisibility rules					•		
Even and odd numbers					•		
Factors					•		
Multiples					•		
Prime numbers					•		
Multiplication							
Arrays			•	♦			
Basic facts				•	•		
Equal groups			•	•			
Equations				•	•		
Even and odd numbers			•		♦		
Measurement quantities				•			
Model multiplication				•			
Multiplication strategies				•			
Multiplicative comparison					•		
Real-world problems				•	•		
Relationship with division				•			
Strategies to multiply				•			
Understand multiplication			•	•	•		
Number and Shape Patterns							
Even and odd numbers				•	•		
Function tables				•	•	♦	
Generate two numerical patterns						•	
Graph two numerical patterns on the coordinate plane						•	
Identify, generate, explain number patterns				•	•		
Patterns on facts tables				•			

Operations and Algebraic Thinking

... Continued

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Skip-counting patterns				•			
Write a rule					•	♦	
Numerical Expressions							
Evaluate numerical expressions						•	
Interpret numerical expressions						•	
Write numerical expressions						•	
Properties of Operations							
Additive Identity Property		•	•	•	•	♦	♦
Associative Property of Addition		•	•	•	•	♦	♦
Associative Property of Multiplication				•	•	♦	♦
Commutative Property of Addition		•	•	•	•	♦	♦
Commutative Property of Multiplication				•	•	♦	♦
Distributive Property				•	•	♦	♦
Identity Property of Multiplication				•	•	♦	♦
Zero Property of Multiplication				•	•	♦	♦
Subtraction							
Basic facts		•	•	♦			
Decompose numbers	•	♦					
Equal symbol	•	♦					
Equations		•	•	•	•		
Estimate differences				•	♦		
Expressions	•	♦					
Inverse of addition	•	•					
Minus symbol	•	•					
Missing numbers in subtraction	•	•					
Model subtraction	•	•					
Multi-step word problems				•	•		
Real-world problems	•	•	•	•	•		
Subtract whole numbers	•	•	•	•			
Subtract zero		•					
Subtraction strategies		•	•				
Word problems		•	•	•			
Write number sentences		•	•				

Expressions and Equations

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Expressions and Equations (EE)							
Algebraic Expressions							
Equivalent algebraic expressions							•
Evaluate algebraic expressions							•
Identify parts of expressions							•
Model algebraic expressions							•
Write algebraic expressions							•
Dependent and Independent Variables							
Analyze relationships between variables							•
Express relationships between variables							•
Graph relationships							•
Linear equations							•
Translate between equations and table values							•
Equations							
Linear equations on the coordinate plane							•
Meaning of equality							•
Model equations							•
Solve one-variable equations							•
Symbols showing relations							•
Inequalities							
Graph inequalities with one variable							•
Identify solutions							•
Solutions of inequalities on a number line							•
Solutions of inequalities using substitution							•
Symbols showing relations							•
Write inequalities							•
Numerical Expressions							
Write numerical expressions							•
Evaluate numerical expressions							•

Measurement and Data

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Measurement and Data (MD)							
MEASUREMENT							
Length and Distance							
Add lengths			•				
Benchmarks and relative size					•		
Choose appropriate tool and unit		•	•				
Compare lengths	•	•	•				
Convert units			•			•	
Customary system			•		•		
Estimate length			•		•		
Measure length		•	•				
Measurements on a line plot			•				
Metric system			•		•		
Order lengths		•	•				
Real-world problems	•	•			•		
Subtract lengths			•				
Transitive property		•					
Liquid Volume and Capacity							
Benchmarks and relative size					•		
Convert units						•	
Estimate liquid volume				•	•		
Measure liquid volume				•			
Word problems				•	•	•	
Mass and Weight							
Benchmarks and relative size					•		
Compare weights	•						
Choose the appropriate unit				•			
Convert units						•	
Estimate mass				•	•		
Measure mass				•			
Order weights	•						
Word problems				•	•	•	
Money							
Count coins and bills			•				

Measurement and Data

... Continued

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Decimal point in money amounts			•				
Decimals and money					•		
Fractions and money					•		
Identify coins and bills			•				
Operations with money					•		
Real-world problems			•		•		
Symbolic notation			•				
Time							
A.M. and P.M.			•	•			
Clocks		•	•	•			
Convert units						•	
Elapsed time					•	•	
Equivalent units			•				
Fractions and time					•		
Real-world problems		•	•	•	•	•	
Tell time		•	•	•			
Units of time			•		•		
DATA							
Classify and count objects	•						
Interpret data							
Bar graph		•	•	•			
Compare data				•	•	♦	♦
Draw conclusions			•	•	•		
Frequency table				•	♦	♦	♦
Line plot			•	•	•	•	♦
Measurement data on a line plot			•	•	•	•	
Picture graph		•	•	•			
Real-world problems		•	•	•	•	•	♦
Tally chart		•	•	•			
Represent data							
Bar graph		•	•	•			
Frequency table				•	♦	♦	♦
Line plot			•	•	•	•	
Measurement data on a line plot			•	•	•	•	

Measurement and Data

... Continued

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Picture graph		•	•	•			
Tally chart		•	•	•			
GEOMETRIC MEASUREMENT							
Angles							
Concept of angle					•		
Related to circles					•		
Measure angles with a protractor					•		
Measure angles using an equation					•		
Sketch angles					•		
Area							
Concept of area				•			
Find area of a complex figure				•	•		
Find area of a rectangle				•	•		
Formula for area					•		
Real-world problems				•	•		
Relate area to multiplication and division				•			
Relate area to perimeter				•			
Units of area					•		
Perimeter							
Compare area and perimeter				•			
Find perimeter of a polygon				•			
Find perimeter of a rectangle				•	•		
Formula for perimeter					•		
Linear and area measures				•			
Real-world problems				•	•		
Relate area to perimeter				•			
Volume							
Attribute in solid figures						•	
Compare volumes						•	
Estimate volume						•	
Measure volume						•	
Real-world problems						•	
Volume as additive						•	

Geometry

- ◆ Investigate and Analyze
- ◆ Apply and Extend

	K	1	2	3	4	5	6
Geometry (G)							
Area							
Changing dimensions and area							•
Draw polygons on the coordinate plane							•
Find area of a composite figure							•
Find area of a parallelogram							•
Find area of a polygon							•
Find area of a trapezoid							•
Find area of a triangle							•
Formulas for area							•
Real-world problems							•
Coordinate Plane							
Define a coordinate system						•	
Graph in the first quadrant						•	
Ordered pairs						•	
Real-world problems						•	
Surface Area							
Find surface area of a cube							•
Find surface area of a prism							•
Find surface area of a pyramid							•
Nets							•
Real-world problems							•
Three-dimensional Shapes							
Attributes of three-dimensional shapes	•	•	•				
Classify shapes		•					
Compose and decompose shapes	•	•	•				
Identify and describe shapes	•	•	•				
Identify shapes in the environment	•						
Make and draw shapes		•	•				
Sort shapes	•	•	•				
Two-dimensional Shapes							
Angles				•	•	•	
Attributes of two-dimensional shapes	•	•	•	•			
Classify angles					•		

Geometry

... Continued

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Classify polygons						•	
Classify quadrilaterals					•	•	
Classify shapes		•	•	•			
Classify triangles by angles					•	•	
Classify triangles by sides					•		
Compose and decompose shapes	•	•	•	•			
Congruency						•	
Equal parts			•				
Identify and describe shapes	•	•	•	•			
Identify shapes in the environment	•						
Line symmetry					•		
Lines					•	♦	
Model and draw shapes	•	•	•	•			
Partition shapes		•	•	•			
Real-world problems						•	
Sort shapes	•	•	•				
Triangles				•	•		
Volume							
Formula for volume							•
Fractional side lengths and volume							•
Real-world problems							•
Rectangular prism							•
Use cubes to find volume							•

Statistics and Probability

• Investigate and Analyze ♦ Apply and Extend

	K	1	2	3	4	5	6
Statistics and Probability (SP)							
Display Data							
Box plot							•
Dot plot							•
Frequency table							•
Histogram							•
Statistical Questions							
Describe data collections							•
Distribution of data							•
Measure of center							•
Measure of variation							•
Recognize statistical questions							•
Summarize Data							
Box plot							•
Describe data collections							•
Describe distributions							•
Dot plot							•
Effects of outliers							•
Frequency table							•
Histogram							•
Interpret data displays							•
Mean as fair share and balance point							•
Measures of central tendency							•
Measures of variability							•



MOVEMENT SCHOOL EAST CALENDAR

August 9	First Day for Students
September 4	Labor Day – No School
September 5	Teacher Workday – Staff Development – No School
October 4	End of First Quarter
October 12-13	Early Dismissal at Noon – Parent/Teacher Conferences – Report Cards
October 16-30	Fall Break – No School
October 30	Teacher Workday – Staff Development – No School
October 31	Students Return from Fall Break
November 10	Veteran’s Day – No School
November 13	Teacher Workday – Staff Development – No School
November 22-24	Thanksgiving Break – No School
December 15	Early Dismissal at Noon
December 18-January 3	Winter Holiday Break – No School
January 3	Teacher Workday – Staff Development – No School
January 4	Students Return from Winter Break
January 12	End of First Semester
January 15	Martin Luther King Jr. Day – No School
January 25-26	Early Dismissal at Noon – Parent/Teacher Conferences – Report Cards
February 19	President’s Day – No School
February 20	Teacher Workday – Staff Development – No School
March 9	End of Third Quarter
March 12	Teacher Workday – Staff Development – No School
March 29	Report Cards
March 30-April 16	Spring Break – No School
April 16	Teacher Workday – Staff Development – No School
April 17	Students Return from Spring Break
May 21	Teacher Workday – Staff Development – No School
May 28	Memorial Day – No School
June 11-12	Early Dismissal at Noon – Parent/Teacher Conferences
June 12	Early Dismissal – Last Day for Students
June 22	Last Day for Teachers

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **AUG 01 2016**

MOVEMENT CHARTER SCHOOL
11405 N COMMUNITY HOUSE RD STE 200
CHARLOTTE, NC 28277

Employer Identification Number:
47-5153366
DLN:
17053181364016
Contact Person:
RONALD D BELL ID# 31185
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
June 30
Public Charity Status:
170(b)(1)(A)(ii)
Form 990/990-EZ/990-N Required:
Yes
Effective Date of Exemption:
September 8, 2015
Contribution Deductibility:
Yes
Addendum Applies:
No

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

You're not subject to the specific publishing requirements of Revenue Procedure 75-50, 1975-2 C.B., page 587, as long as you operate under a contract with the local government. If your method of operation changes to the extent that your charter is not approved, terminated, cancelled or not renewed, you should notify us. You'll also be required to comply with Revenue Procedure 75-50.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

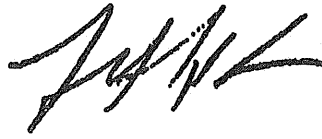
For important information about your responsibilities as a tax-exempt

Letter 947

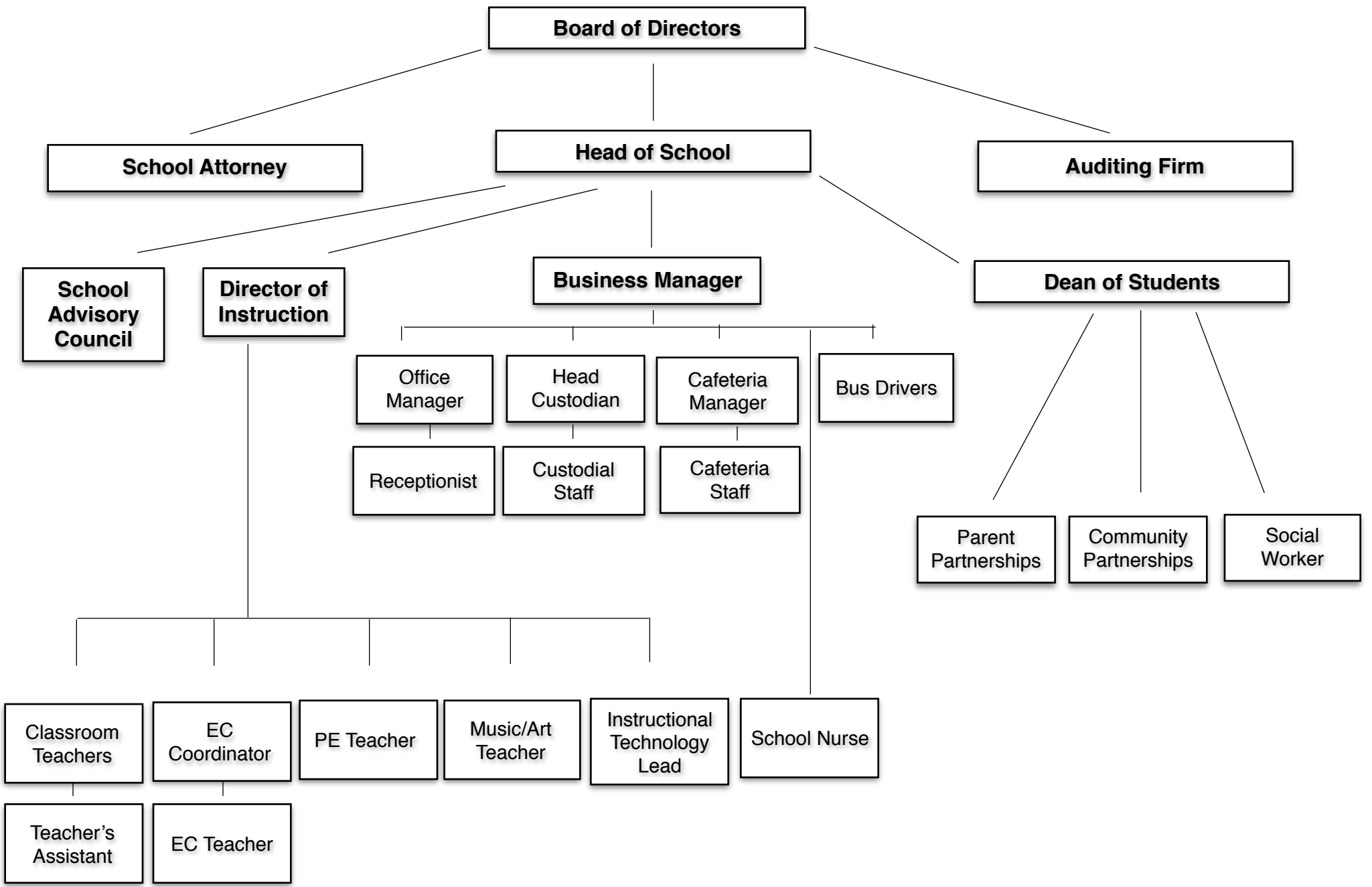
MOVEMENT CHARTER SCHOOL

organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

A handwritten signature in black ink, appearing to read "Jeffrey I. Cooper". The signature is stylized with a large initial "J" and a long horizontal stroke at the end.

Jeffrey I. Cooper
Director, Exempt Organizations
Rulings and Agreements



Bretton R. McDonough, CFA

1301 Briar Creek, Charlotte, NC 28205 • (704) 258-2779 • brettmcdonough@hotmail.com

Experience

Movement Holdings, LLC

Chief Investment Officer

Charlotte, NC

January 2015 - Present

- My current responsibilities include the financial oversight and strategic management of core and affiliated investments, as well as non-profit and Foundation initiatives

Hayden Harper Energy KA, LLC

Vice President of Acquisitions

www.haydenharperenergy.com

Charlotte, NC

August 2009 – December 2014

- Currently managing acquisitions and project development for an investee company, focusing on the direct ownership of natural gas operations throughout the Appalachian Basin.
- Responsible for financial and cash-flow analysis, identifying investments opportunities, management of the due-diligence process, forecasting, financial planning & modeling, evaluating pricing models, implementing product and financial hedging strategies (puts, swaps and collars) and managing capital investments and budgeting
- Manage and coordinate the closing process, working with general counsel, lender legal, and various third party consultants
- Monitor current investment performance; communicate and coordinate with our private equity firm's executive management team
- Assigned to manage the 12-month procurement and delivery of a 20 mmcf natural gas liquid processing facility. Responsible for coordinating procurement timeframes based on product performance simulations and costs from numerous vendors around the country, in order to optimize results, while also meeting budget assumptions.
- Assigned to facilitate an annual \$8mm reinvestment and drilling budget by performing optimization analysis of current investment opportunities based on analysis of cost of funds, prospective returns, tax obligations, costs and current company liquidity.

Hayden Harper, Inc

Associate- Private Equity

www.haydenharper.com

Charlotte, NC

November 2007 – August 2009

- Responsible for the financial analysis and underwriting on all private equity investments
- Evaluated an array of investments, to include, real estate, oil and gas, structured lending, RMBS & CMBS
- Participated in developing the ownership structure and partnership agreements
- Compiled relative value comparisons and monitored funds using NAV, DPI, RVPI and TVPI

Allegiance Realty Corporation

Director of Acquisitions

www.allegiancerealestate.com

Charlotte, NC

June 2004 – November 2007

- Managed the acquisition process in over 40 transactions with a value in excess of \$600 million
- Managed a team of (5) acquisition associates in their efforts to source value-add properties nationwide
- Performed project analysis and performance review based on underwriting assumptions and budget constraints
- Negotiated loan commitments, loan documents, notes and terms with prospective lenders
- Managed the flow of data between internal and external sources during the due diligence and closing process; assisted in procuring the necessary documents to complete the acquisition.
- Developed a successful track record of sourcing, analyzing, acquiring and ultimately liquidating investments.
- Coordinated with internal asset managers to insure onsite management and leasing achieved or exceeded proforma assumptions.
- Managed capital investments and budgeting of over \$20 million in hotel renovations.
- Evaluated the financial and economic impact of dispositions based on market conditions, proforma assumptions, and capital reallocation opportunities with the CEO & CFO.

Allegiance Realty Corporation

Analyst

www.allegiancerealestate.com

Charlotte, NC

June 2002- June 2004

- Gained an acute knowledge from the "ground up" in several facets of the real estate industry including: property management, leasing, financial analysis, forecasting, financial modeling, and construction management
- Responsible for the underwriting and analysis of over 400 office and hotel assets
- Performed onsite interviews and inspections for properties, tenants, management, and markets.
- Reviewed & evaluated: leases, contracts, rent rolls, tenant financials, Property Improvement Plans (PIP's), franchise agreements, quality scores, brand recognition, brand penetration, STR reports, property conditions, renovation costs, term sheets, loan documents, environmental reports, surveys, purchase contracts, title reports, settlement statements, partnership agreements, offering memorandums, operating agreements, management agreements and leasing agreements.
- Managed the production and review of marketing materials and investment offerings.
- Created detailed financial projections and Argus models to evaluate cash flow projections and potential internal rates of return.

Bretton R. McDonough, CFA

223-5 South Torrence St., Charlotte, NC 28204 • (704) 258-2779 • brettmcdonough@hotmail.com

Education and Certifications

Rutgers College and The Rutgers Business School

Bachelor of Science Degree Major: Finance Minor: Geology

New Brunswick, NJ
September 1998 - May 2002



Mr. McDonough holds the Chartered Financial Analyst® (CFA®) designation, a graduate-level self-study program that combines a broad curriculum with professional conduct requirements, culminating in three sequential exams. The curriculum focuses on Ethical and Professional standards, Corporate Finance, Economics, Financial Reporting Analysis, Quantitative Methods, Alternative Investments, Derivatives, Equity Investments, Fixed Income and Portfolio Management.

References

- Phil Bosche, Battalion Chief- Charlotte Fire Department – 704-258-8291 – pbosche@carolina.rr.com
- Dustin Swineheart, Director of Development – Sports Outreach Institute – 704-965-5080 – dswineheart@sportsoutreach.net
- Christopher Allen, VP – Hayden Harper, Inc – 704-957-1956 – callen@haydenharper.com
- Bill Loehning, EVP - Fidelity Investments – 401-292-6703 – bill.loehning@fmr.com
- Peter Bates, VP – W.P. Carey & Co. LLC – 212-492-1129 – pbates@wpcarey.com

Hobbies/Interests

For the past 4 years my wife and I have been actively involved with a non-profit organization called Sports Outreach Institute (SOI). Sports Outreach focuses on community transformation in the Southeastern US, Southern Mexico and Uganda, through administering feeding, education, vocational training, sport ministry and public health programs. Our work with SOI has involved three volunteer trips to Africa and numerous outreach events/programs within the Charlotte community.

In my free time I also like to enjoy numerous outdoor activities, including; cycling, mountain biking, hunting, camping and kayaking.

10003 Zackery Ave
Charlotte, NC 28277
SS # 216-02-8689

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Fax 704 973-7975
E-mail
cscrawford86@yahoo.com

Casey Crawford

Education 1995 - 2000 University of Virginia BA Charlottesville, Virginia
Major in Sociology, Graduate Studies in Economics
Academic All-ACC 97,98
All-ACC tight-end 98

Professional experience July 27 2007-Present **New American Mortgage**
14120 Ballantyne Corp Place, Ste 250
Charlotte, North Carolina 28277
President
Manage day to day business affairs of company.
Recruit and train loan officers in sales techniques
Establish preferred relationships with local real estate and builder companies

5/2003-7/2007 **Greenbrier Mortgage**
14045 Ballantyne Corp. Pl., Ste 550
Charlotte, North Carolina 28277
President
Manage day to day business affairs of company.
Recruit and train loan officers in sales techniques
Establish preferred relationships with local real estate and builder companies
Increased Sales Volume to over 40 million dollars per year.
Profitable every quarter of operations.

5/2002-5/2003 **Realty World**
11130 Lawyers Road
Mint Hill, North Carolina 28227
Realtor- Rookie of the Year Realty World Carolinas closing over 60 transaction in first 12 months.

9/2001-5/2002 Tampa Bay Buccaneers
One Buccaneer Pl., Tampa, Florida 33607
Super Bowl Championship Team
Player- Tight End

9/2000-5/2001 Carolina Panthers
800 South Mint St. Charlotte, NC 28202
Player- Tight End

(704) 509-5470 (W)
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(980) 230-6595 (cell)
cturner@thesugarcreek.org
(school)
cheryldenise14@gmail.com (home)
416 Rook Rd
Charlotte, NC 28216

Cheryl D. Turner

Experience

School Director

March 2001 – Present

Sugar Creek Charter School, Charlotte, NC

- Leader and manager of 1400 student K-10 school
- Implemented curriculum changes that resulted in 53% improvement in school's performance on state achievement tests in a three year period
- Supervise, manage and evaluate a staff of 159 instructional and non-instructional employees
- Assess staff development needs and provide training as needed
- Manage \$15.1 million budget
- Write grants for all federal programs
- Recruit staff
- Maintain stable student enrollment
- Provide leadership in the development of school policies, master schedules, daily programs, master calendar, and pupil and teacher handbooks
- Identify staff development needs and arrange for appropriate staff development
- Handle school discipline
- Maintain good relations with School Board, parents and community
- Develop strong community partnerships
- Ensure school's compliance with all local, state and federal regulations and laws
- Build and maintain a school culture of high student achievement and a disciplined orderly environment
- Act as spokesperson for the school at community forums and other public events as well as with the media
- Serve as LEA superintendent
- Moved school from NCLB governance to NC School of Distinction

Served on NC Public Charter School Advisory Board– October 2011- Present –
Served as chair of Advisory Council Policy Subcommittee

Curriculum Specialist

October 2000 – March 2001

Sallie B. Howard Charter School, Wilson, NC

- Evaluated curriculum and made recommendations for curriculum improvement
- Designed and implemented End Of Grade test prep for grades 3-6, resulting in a 35% improvement in middle school reading scores in a 9 week period.
- Observed and evaluated teacher performance
- Reviewed teacher's lesson plans

Assistant Director for Instruction/Curriculum Specialist

July 1997 – October 2000

Rocky Mount Charter School, Rocky Mount, NC

- Managed the academic program of the school from pre-start up phase and repeated this process over 4 location changes.
- Served as Acting Director as well as Assistant Director for instruction for a period of 14 months.
- Provided continuity for the staff, students and parents through 4 director changes in 3 years.
- Responsible for academic performance for a school that went from 400 students to 800 students in a four year period. State academic achievement ratings moved from Adequate to Meets Expectations in that time period.
- Responsible for the appropriate placement and instruction for all students.
- Provided academic leadership for an instructional staff of 60.
- Arranged or conducted staff development for all instructional staff
- Responded to parent's concerns about the academic progress of their children
- Assisted with student recruitment primarily by providing a strenuous academic program about which the "word of mouth" kept the school with waiting lists of several hundred students.
- Provided financial leadership in the budgetary areas over which I had control. (textbooks, instructional materials, etc.)
- Communicated the school's mission in such a way that the state's annual report on charter schools read, "At Rocky Mount Charter School there is a sense of shared mission. All stakeholders, including parents, students, staff and board members could easily articulate, in their own words, the school's stated mission."
- Observed and evaluated instructional staff
- Provided support to the Board of Directors as requested

August 1993 – July 1997 Baltimore City Public Schools , Baltimore, MD

Teacher/Implementation Specialist

- Taught 1st and 2nd grade and a 1/2/3 combination class for students who were at-risk of special education placements.
- Assisted with the initial implementation of Direct Instruction (DI) in 6 city schools.
- Managed the DI program at two city schools. Trained teachers, monitored instruction and student achievement Served as co-chair of School Improvement Team for two years
- Wrote \$356,000 in funded grants.

Military Service

United States Army – 10 years – Military Radio/Television Broadcaster

Previous unrelated experience

Promotions manager for a line of women’s specialty stores
Public Affairs Coordinator for several non-profit arts organizations

Education

BA – Government May 1983 – University of Maryland University College – European Division
MA – Education Leadership and Management – December 2008 –Seton Hall University
Ed. D – Educational Leadership – Expected August 2015 – Gardner-Webb University

Certification:

Principal – NC
K-6 Elementary – NC
Middle School Social Studies – NC
High School Social Studies -NC
K-6 Elementary – MD

J. Franklin Martin

164 Cherokee Road; Charlotte, NC 29207

704 574 2086

Jfrankmartin@gmail.com

Education:

University of North Carolina at Chapel Hill, 1962-1966

Bachelor of Arts, Major in Economics

Morehead Scholar

Phi Beta Kappa

Harvard University, 1969-1971

Master's in Business Administration

J. Spencer Love Fellow

Emphasis on real estate development

Military

U.S. Navy Reserve, 1966-1969

Served in South Viet Nam, 1967-1968, and at the Naval Security Group, Fort Meade, MD, 1968-1969

Honorably discharged in 1969 as Lieutenant, Senior Grade

Career

Real estate developer, 1972-Present

Atlanta, Ga., 1972-1978

Charlotte, NC, 1978-Present

Community Service

Past President, Charlotte Homebuilders Association

Past Board Chair, Sustainable North Carolina

Founding Board Member, Charlotte Mecklenburg Housing Partnership

Past Commissioner, Charlotte Housing Authority

Founding Board Member and Past Board Chair, Harvest Center Homeless Ministry

Founding Board Member and Current Board Chair, Sugar Creek Charter School

John Garrett McNeill

4920 El Molino Drive, Charlotte, NC

704-526-9080

garrett@movementfoundation.org

Education

East Carolina University, Greenville, North Carolina

Bachelor of Science - Finance

Gordon Conwell Theological Seminary, Charlotte, North Carolina

Masters of Divinity

Qualifications

Personal and persuasive with clientele, workforce and management personnel.

Self-motivated, independent, strong and capable presence.

Employment

2013 – Present: Director, The Movement Foundation, Charlotte, NC

2012 – 2013: Field and Partner Relations, With Open Eyes Foundation, Charlotte, NC

Traveled overseas to assess the needs of partners as well as establish new ministry sites. Grew ministry from 75 partners to over 200 in less than a year and expanded into new regions. Created key marketing initiatives, spoke on behalf of organization at conferences and large events, and managed donor relationships.

2011 – 2012: Director of Client Services, Hermitage Wealth Management, Richmond, VA

Engaged high net worth individuals and consulted on corporate retirement plans, becoming a top 10 firm in the country. Developed creative marketing strategies and worked with top level executives to implement employee centered education models.

2010 – 2011: Missionary (Squad Leader), Gainesville, GA

Coordinated logistics for over large teams traveling by plane, bus, train, or boat to over 20 countries. Reviewed and managed all finances and budgets for the squad. Worked with organizations in 4 continents to establish and maintain relationships with ministry hosts. Participated in ministries including sex-trafficking prevention, church planting, clean water initiatives, construction, and orphanages.

2008 – 2010: Financial Advisor Capitol Financial Solutions, Raleigh, North Carolina

Worked to build strong financial relationships with individuals, specializing with small business entrepreneurs. Prepared in-depth, client-specific reports and assisted in planning for their financial futures. Attained Series 7, Series 66, Life, Health, and Long Term Care Licenses.

Board Positions

- Sugar Creek Charter School
- Whatever is Pure
- Agape Love Christian Ministries
- Parish LB

Computer Skills Microsoft Word, Microsoft Excel, Microsoft Power Point, Microsoft Access, VIP Computer systems, Reuters and Sun Guard Financial Planning.

Appendix F:

Charter School Board Member Information Form

***Note:** To be completed individually by each proposed founding charter school board member. All forms must be signed by hand.*

Serving on a public charter school board is a position of public trust and as a board member of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

1. Name of charter school on whose Board of Directors you intend to serve: **Movement Charter School**

2. Full name: **John Garrett McNeill**

Home Address: **4920 El Molino Drive**

Business Name and Address: **Movement Foundation**

Telephone No.: **877-314-1499**

E-mail address: **garrett@movementfoundation.org**

3. Brief educational and employment history.

Education:

East Carolina University – BS Finance

Gordon Conwell Theological Seminary – MDiv

Employment:

Movement Foundation, Director, 2014-2017

With Open Eyes Foundation, Partner and Field Relations, 2012-2014

Hermitage Wealth Management, Client Relationship Director, 2011-2012

4. Have you previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation?

No: Yes:

5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?

I have been on the board of Sugar Creek Charter School and I've also been intimately involved in the creation of Movement Charter School from a facilities and marketing perspective. I was asked from the Board Chairman if I would consider joining the board in order to provide facilities and marketing expertise. I wish to serve on the board because I have a deeply held belief that education is critical in the

alleviation of material and social poverty, and the local school has an opportunity to impact the next generation of leaders in our country. The foundation that is laid through primary education is an endeavor that I am excited to continue engaging in as a part of my life's work.

6. What is your understanding of the appropriate role of a public charter school board member?
I understand the role of a board member to both inform and support the school staff. Through casting vision and goal setting the board is responsible for the overall direction of the school. Outside of this and monitoring progress, the role of the board member is to provide the best support possible to the school director and staff in order to ensure successful outcomes.

7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.
I currently serve on Sugar Creek Charter School's board which is one of the highest performing high poverty charter schools in North Carolina. I have also had experience serving on the board of multiple non-profits in the greater Charlotte community. I have been intimately involved with starting and running charter schools and this has given me great insight into the fiscal and infrastructural needs of establishing a charter school.

8. Describe the specific knowledge and experience that you would bring to the board.
 - **Developing a month over month cash flow and five year budget for school revenue and expenditures**
 - **Managing the construction process**
 - **Technology procurement and infrastructure**
 - **Low-Volt facilities management**
 - **Securing and executing state contracts for goods and services**
 - **Staffing and Hiring well equipped school staff**
 - **Marketing a new school within a local community**
 - **Vendor identification and negotiation for goods and services**
 - **Facilities Management**
 - **Developing comprehensive project plan**
 - **Playground surfacing and equipment expertise**
 - **Working relationships with city and county government**

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
Movement School is committed to loving and valuing our students through education. It is our belief that every student is different and deserves every opportunity that is available to the greater community. It is also our belief that the students, when given the right tools, will perform at the highest levels.

2. What is your understanding of the school's proposed educational program?
Though not an education expert, I fully believe in the learning style and emphasis on character development that is present in the Movement School curriculum. The interventionist position and resulting opportunities for small group learning within the greater context of the classroom is something I believe to be beneficial. The ways the school chooses to integrate technology is also a highlight.

3. What do you believe to be the characteristics of a successful school?
A successful school must be brutally honest and hopefully optimistic. We must understand where we are falling short and address these areas while striving to become one of the top performing schools in the country. Goal setting and monitoring is extremely important, and the goals must be realistic. Successful schools typically develop a strong staff and school culture as well. I trust that if we create an environment of loving and valuing our staff and students and their families while holding our students and staff academically accountable, we will be successful.
4. How will you know that the school is succeeding (or not) in its mission?
I think this is represented both statistically and anecdotally. There are absolute metrics that will measure our students academic success and there are measurable goals that will allow us to ascertain the school's "success." However, there are many other elements that lead to success in the life of those associated with Movement School which is typically expressed anecdotally. If we are able to love and value our students through our wrap-around services model, I believe this also lends itself to "success". Mental health, social services, after hours events, and the overall culture of the school is something much more difficult to measure but it is something I hold equally important when trying to understand "success."

Governance

1. Describe the role that the board will play in the school's operation.
As mentioned earlier the school board will be responsible for goal-setting and monitoring. Financial modeling, facilities management, and academic performance and culture are the four areas where I think the board has the most opportunity to set the tempo of the school. Though the board is able to set the desired path, it is my belief that the school director is equally responsible in taking the feedback and vision of the board and implementing that within the daily context of school.
2. How will you know if the school is successful at the end of the first year of operation?
There are a few metrics that are readily available in determining a successful first year. If the school is achieving its academic benchmarks as well as operates at a surplus in the first year, I would consider this successful. If the school is able to establish a strong PTA and volunteer base for ongoing operations this will also be critical for future success. If the school meets or exceeds 90% of year 1 goals then I would consider it a success.
3. How will you know at the end of five years of the schools is successful?
This answer is similar to the previous question. If the school continues to progress year over year and meets or exceeds 90% of its year over year goals then I trust it will be a successful school.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
The school board will need to monitor progress through monthly meetings and become intimately involved with the school through board committee assignments. This monitoring and subsequent correction when needed will help the school stay on track and meet or exceed its goals.
5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?
Unethical actions will not be tolerated by the board of Movement School. If there is a belief that one or more members are acting unethically, it would be my responsibility to bring another board member in order to confront the party with the allegations in order to discuss if it is worthy of presenting to the full board and the extent of the truthfulness of the allegations. If these actions are deemed unethical it

Appendix G:

Charter School Board Member Information Form

Note: To be completed individually by each proposed founding charter school board member. All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and as a board member of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

1. Name of charter school on whose Board of Directors you intend to serve: Movement School East
2. Full name: Joseph Franklin Martin
Home Address: 164 Cherokee Rd, Charlotte, NC 28207
Business Name and Address:
New Carolina Properties; 333 W. Trade St., Suite 370, Charlotte, NC 28202
Telephone No.: 704-574-2086
E-mail address: jfrankmartin@gmail.com
3. Brief educational and employment history.
BA from UNC Chapel Hill, 1966. MBA from Harvard
Real Estate Development in Atlanta, GA 1972-1978
Real Estate Development in Charlotte, NC 1978-2015
4. Have you previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation? Yes
5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?

In 2015, Garrett McNeill of Movement Foundation asked me to join the board to launch the original Movement School in west Charlotte. I wished to serve because I share Mr. McNeill's interest in providing excellent education for students from low income families. Having successfully launched one replication of Sugar Creek in West Charlotte, I want to assist in a second replication in east Charlotte.

6. What is your understanding of the appropriate role of a public charter school board member?
Set the school strategy and see that it is pursued. Select and Oversee the school director. Assure sound financial operation of the school.
7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.
I have served on the board of Sugar Creek Charter School of Charlotte, NC from its founding in 1998 until the present. I was elected board Chairmen from 1998-2003 and again from 2010-2015
8. Describe the specific knowledge and experience that you would bring to the board.
I have 44 years of business experience, most as the CEO of a small business. I have 30 years of Charlotte community service experience. I have 17 years of charter school board member experience.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
The mission is to provide an excellent education for low income students. The guiding belief is that an excellent education can break the cycle of poverty.
2. What is your understanding of the school's proposed educational program?
The proposed educational program will focus on the needs of low income students. Academic rigor will be combined with authentic relationships between students and teachers. Teachers will convey high expectations.
3. What do you believe to be the characteristics of a successful school?
Skilled and committed teachers. A supportive climate and culture. A balanced focus on academic excellence and on life skills development.
4. How will you know that the school is succeeding (or not) in its mission?
I will see happy and engaged students that are demonstrating academic proficiency levels far above other schools serving demographically similar student bodies.

Governance

1. Describe the role that the board will play in the school's operation.
The full board will meet regularly and review academics, finances, and operations. Board committees - for examples, "Finance", "Governance", and "Long Range Planning" will work on specific areas and report at full board meetings.

2. How will you know if the school is successful at the end of the first year of operation?

Teachers will begin to show a shared understanding of the school's mission and culture. Students will consistently display acceptable decorum. Academic proficiency will be at levels equal or above that of peer schools.

3. How will you know at the end of five years of the school's operation?

All teachers will have a firm grasp of and commitment to the school's mission. Students will be proud to be part of the school. Academic proficiency will be significantly above that of peer schools.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Hire a top-flight school director. Build a sound financial foundation. Secure suitable facilities adequate to accommodate growth. Assure selection and implementation of an instructional program suited for the target student body.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

I would meet with the board chair and another board member and tell them of my concerns, or if the chair were among those acting wrongly I would choose 2 or 3 other board members. In conjunction with those fellow board members, I would decide appropriate next steps.

*Please include the following with your Information Form a resume • a national criminal background check

*If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action taken and the license validity.

Certification

I, Joseph Franklin Martin, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Movement School East is true and correct in every respect.

Joseph Franklin Martin
Signature

September 7, 2017
Date

Appendix G:

Charter School Board Member Information Form

Note: To be completed individually by each proposed founding charter school board member. All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and as a board member of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter. As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

1. Name of charter school on whose Board of Directors you intend to serve:

Movement School East

2. Full name: Cheryl Denise Turner

Home Address: 416 Rook Rd. Charlotte, NC 28216

Business Name and Address: Sugar Creek Charter School 4101 N Tryon St. Charlotte, NC 28206

Telephone No.: 704-509-5470

E-mail address: cturner@thesugarcreek.org

3. Brief educational and employment history.

B.A. — Government — University of Maryland

M.Ed. — Educational Leadership — Seton Hall University

ABD - Educational Leadership — Gardner-Webb University — Anticipated Graduation Aug. 2015

10 years active duty Army — Military Broadcaster

5 years — Elementary/MS Teacher — Baltimore City Public Schools

4 years — Professional Development Coordinator — Rocky Mount Charter, Rocky Mount, NC

18 years — School Director— Sugar Creek Charter School, Charlotte, NC

4. Have you previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation?

Yes

5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?

Approximately 5 years ago, several members of Movement Foundation attended an informational breakfast at Sugar Creek. A year or so later, they contacted us requesting a meeting to obtain further information about charter schools and the process for applying. A couple of months later they met with us and indicated that they were interested in applying for a charter and wanted to replicate the work we were doing at Sugar Creek. They asked if we would be willing to assist them. Once they began to form their board, I was asked if I would be willing to serve. After serving on the board to help with the initial replication of Sugar Creek in west Charlotte which launched in 2017, I am also interested in helping to create a second replication— Movement School East--in east Charlotte to open in 2019.

6. What is your understanding of the appropriate role of a public charter school board member?

I see the role of the board as visionary and monitoring. As a board member, I see myself as being responsible for providing guidance that keeps the school on mission, monitoring the school's success towards its goals as well as monitoring financial health and regulatory compliance. One of the ways this is accomplished is by hiring a strong, competent school leader. It is the board's responsibility to hire leadership that can accomplish the mission that has been defined and then providing support to that leader. That should include evaluating the leader's performance and maintaining regular stewardship over finances and compliance. The board is also responsible for long term and strategic planning.

7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have served for four years as a member of the North Carolina Charter School Advisory Council/Board. In that capacity, I helped establish the procedures and expectations for obtaining a charter in NC. At one point, I chaired the Policy Committee that made recommendations for statewide charter school policies. I have personally reviewed all of the applications that were submitted for charters from the first fast track applications through the applications for charters that will open in 2018. I have been a part of deliberations about charters that have struggled and/or failed as well as renewal decisions during that period. I have a very strong sense of what constitutes a strong charter and what is necessary to be successful. I also have a good sense of what the pitfalls are that cause charters to fail.

I have served as an ex officio member of the Sugar Creek Charter School board for the last 18 years. I have been a part of all major decisions to include growth from 350 students to 1600 and expansion to include high school. All of this included 4 property renovations and the purchase of 2 commercial properties.

8. Describe the specific knowledge and experience that you would bring to the board.

Having been the school leader of Sugar Creek Charter for the last 18 years, I bring not only instructional leadership experience, but operational experience as well. Movement is looking to replicate the work we have done at Sugar Creek. As the school leader, I have been the point person for developing the program at Sugar Creek.

In addition, I have done start up 4 times. I was the first employee of Rocky Mount Charter in 1997. I was responsible for startup then. We opened in a temporary site and had to start up again in a permanent site later in the year. In September of 1999, Rocky Mount Charter was completely destroyed by Hurricane Floyd. We lost everything and were forced to reopen after a month in 5 temporary locations. The school was without a director at the time, so I was acting as temporary director. Several months later, FEMA set up a trailer village for us and we had to start up again at that location. Given those experiences, I would have to say that I bring strong start up experience. Coupling that with 16 years of operating a successful charter, I think that I have some valuable expertise to assist Movement as they begin this journey.

School Mission and Program

1. What is your understanding of the school 's mission and guiding beliefs?

Movement School is targeting low income at-risk students on the east side of Charlotte. Their mission is to provide these students with a culturally relevant, rigorous academic program that includes a focus on character development, college and career persistence and data-driven decision making.

2. What is your understanding of the school's proposed educational program?

The academic program will be based on the North Carolina Standard Course of Study with a highly developed character development and college and career persistence curriculum included. The instructional model will be specifically tailored to researched based strategies that have proven to be effective with at-risk students.

3. What do you believe to be the characteristics of a successful school?

A school cannot be successful unless their students are academically successful, since the primary objective of school is academics. However, to be truly successful in the environment that Movement is targeting, the school must consider developing the entire child. This includes character development and the soft skills necessary to be successful in life. In a successful school all stakeholders are valued, but the total success of the students must be the highest priority.

Operationally, the school will need to be fiscally sound and in compliance with all regulatory requirements.

4. How will you know that the school is succeeding (or not) in its mission?

Initially, success will have to be evaluated by progress toward the school's stated goals. This would include academic, cultural, fiscal and operational goals. Another indication of success would be meeting recruitment and retention goals for students and staff.

Governance

1. Describe the role that the board will play in the school's operation.

The role of the board is to provide vision and oversight. The board should not be involved in the day to day operation of the school. It is the board's responsibility to hire a capable school leader who can accomplish those tasks.

2. How will you know if the school is successful at the end of the first year of operation?

Success will be defined in several different ways. First and foremost is student achievement. Given the students that the school expects to attract and the performance of the schools they are coming from, it is highly likely that proficiency scores may be low. However, it is expected that students will meet or exceed their expected growth for the year. The school will strive to provide 1.5 years growth for each year of instruction. The school should be in compliance in all regulatory areas and be in a sound financial position. Student recruitment and retention should reflect satisfaction with the program students are receiving.

3. How will you know at the end of five years of the schools is successful?

By year 5, I would expect that the school will have successively improving proficiency scores. Student growth should continue to exceed expected. The school should continue to be in regulatory compliance in all areas. Also, by year 5, the school should be financially self-sustaining and require little additional support from Movement Foundation for operating costs. It is possible that the building will need expanding at this point, which costs will be absorbed by Movement Foundation, but operating costs, including rent should be managed from the school's resources as well as the development of a substantial fund balance. The school should be meeting enrollment and retention goals.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

I think active involvement and vigilance are the most important things the board can do. Every board member needs to be abreast of academic performance data throughout the school year, as well as monitoring finances and budget.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?
I would you the guidelines provided in the bylaws designed to address this particular issue.

*Please include the following with your Information Form

- a one page resume
- a national criminal background check

*If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action taken and the license validity.

Certification
I, Cheryl Turner

certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Movement School East is true and correct in every respect.

Cheryl R. Turner
Signature

9/13/17
Date

Appendix G:

Charter School Board Member Information Form

Note: To be completed individually by each proposed founding charter school board member. All forms must be signed by hand.

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As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

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Background

1. Name of charter school on whose Board of Directors you intend to serve: Movement School East

2. Full name: Casey Stuart Crawford
Home Address: 10003 Zackery Ave, Charlotte NC 28277
Business Name and Address: 8024 Calvin Hall Rd, Indian Land, SC 29707
Telephone No.: (757) 227-3385
E-mail address: casey@movement.com

3. Brief educational and employment history.

B .A. University of Virginia	1995-1999
Carolina Panthers	2000-2002
Tampa Bay Buccaneers	2002-2003
Greenbrier Mortgage	2005-2007
Movement Mortgage	2008
	Present

4. Have you previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation?
No

5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?
I've had a vision for years to see children in poverty receive a great education and in-turn, an opportunity to be developed into the great leaders of tomorrow. Through my ownership in a growing company, I have been given the resources to help develop this vision in Charlotte. I reached out to Sugar Creek Charter School as we heard about their successful outcomes and wanted to see something similar in Charlotte. After much discussion and data collection it was decided that the best option for a school in

Charlotte would be to replicate Sugar Creek Charter School. I am very encouraged by the progress of our original Movement School in west Charlotte, and I am eager to provide additional opportunities to students through Movement School East.

6. What is your understanding of the appropriate role of a public charter school board member?

After many discussions with Frank Martin who has been on the board at Sugar Creek since inception, I recognized the great responsibility of board members. The role of a board member is to develop a strategic plan that allows the school to foster successful outcomes. Board members must continuously monitor progress and adjust accordingly as the school either meets and exceeds goals or does not. The board members oversee the day-to-day work of the principal and their team as well as makes decisions to ensure future financial stability.

7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I currently serve on two boards, New Dominion Bank and Movement Foundation. I joined New Dominion in 2013 as part of a turn around initiative and successfully led a recapitalization of the bank and a reorganization of the senior management team including transitioning the CEO. Serving on a community bank board is a weighty responsibility that includes a fiduciary to the shareholders as well as a duty to act as a good corporate citizen to the community that your serve. Bank board service involves state and federal oversight as well as continuing education. My service on the Movement Foundation board has given me unique and specific insight into the challenges facing urban education and the generational and cyclical nature of the plight of the urban poor.

8. Describe the specific knowledge and experience that you would bring to the board.

I played professional football so I understand the ethics of hard-work and determination in the face of adversity. I also started a lending institution that has grown from 8 employees to over 2, 000 in a matter of 7 years. Through the combination of these experience as well as serving on multiple boards, I will be able to help with organizational management, marketing, culture, and financial stewardship.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

Provide top-tier educational opportunities for low income students. It is our belief that this can break the cycle of poverty and provide a hopeful solution to families living in Charlotte.

2. What is your understanding of the school's proposed educational program?

The program that we are replicating is geared towards reaching a target demographic of low-income students. The educational program is focused on meeting students where they are and teaching from that place. There is also a strong emphasis on character development and authentic relationships.

3. What do you believe to be the characteristics of a successful school?

I believe it begins with the principal and staff. A staff that has a heart to see transformation happen in the lives of students and genuinely cares about their individual outcomes more than their collective outcomes leads to a successful school. As a board we often talk about how necessary it is to pursue academic excellence, but not to forget to develop the character and life-skills of the students with which we've been entrusted.

4. How will you know that the school is succeeding (or not) in its mission?

We will get regular progress reports and have worked to develop strong systems of accountability as the school works towards achieving specific performance metrics. It is my hope that within a few years the numbers and character of our students speaks for itself. We will also do comparative studies with other schools with a similar demographic to assess our success specifically within the demographic we are serving.

Governance

1. Describe the role that the board will play in the school's operation.

The board will oversee the school's finances and operations. The board will also regularly monitor academic performance of students. Different sub-committees will be responsible for more specific operational functions such as facilities and governance. Generally speaking the board is responsible for more big-picture and strategic long/short term planning.

2. How will you know if the school is successful at the end of the first year of operation?

We will conduct a performance review with the principal to discuss the educational and social programming strengths and weaknesses in year 1. The results of assessments developed within the school to test academic growth and academic performance will also be key in understanding successful outcomes for the first year. Peer to peer comparison data with other schools will also shed light on this success. And lastly, we will also have teacher surveys to assess the satisfaction of teachers and gauge their opinions on operational success.

3. How will you know at the end of five years of the schools is successful?

At the end of five years we will know the school is successful on a number of factors. If attrition rates amongst the staff is low and the overwhelming majority have bought into the culture we are establishing and morale is high it would be a great success. We are shooting for 90% proficiency within the first 5 years so that will be another mile-marker for success. Lastly, peer-to-peer evaluations will be significantly higher than that of other school operating in areas of high poverty.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Hiring a great principal and staff is the first step, and the second is establishing a culture that they believe in. Implementing a great culture and fun work environment for teachers is essential. A great facility that staff and students can take pride in and can accommodate the needs of the school would be a top priority as well. Closely monitoring student growth and performance metrics and adjusting accordingly within the first few years will be key to success as well.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

I would convene a meeting with the board chair to discuss and take appropriate steps to help remedy the situation if it was determined that any impropriety had occurred. If the board chair was the party in question, I would convene a meeting with myself along with the governance committee to discuss and take appropriate steps to help remedy the situation if it was determined that any impropriety had occurred

*Please include the following with your Information Form

- a one page resume
- a national criminal background check
-

*If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action taken and the license validity.

Certification

I, Casey Crawford, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Movement School East is true and correct in every respect.



Signature

9/8/17
Date

Appendix G:

Charter School Board Member Information Form

Note: To be completed individually by each proposed founding charter school board member. All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and as a board member of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

1. Name of charter school on whose Board of Directors you intend to serve:
Movement School East

2. Full name: Bretton Reif McDonough
Home Address: 1301 Briar Creek Rd, Charlotte NC 28205
Business Name and Address:
Movement Mortgage — 8024 Calvin Hall Rd, Indian Land, SC 29707
Telephone No.: 704-258-2779
E-mail address: brett.mcdonough@movement.com

3. Brief educational and employment history.
B.S — Finance —Rutgers Business School 2002 —
Certified Financial Analyst (CFA) designation — 2010.
14 years within the financial industry.
Spent 6 years as Director of Acquisitions for a Charlotte based private equity commercial real estate company. 7 years with a Charlotte based private equity company focused on the energy industry.
Currently Chief Investment Officer for Movement, a Charlotte based mortgage bank.

4. Have you previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation?
No

5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?
Casey Crawford had a vision to start a school in Charlotte and he knew my desire to see alternative educational models implemented with children in poverty, and he asked me to join the board. There are numerous great opportunities for individuals who can afford specialized education, but I wanted to see something for children and families who could not afford it. We visited Sugar Creek Charter School because they had proven results in a similar demographic we wished to serve and we were blown away

by their staff and outcomes. Once we realized they would be excited about replication in west Charlotte, we started planning for a charter school based on their model and I am beyond excited to see it come to fruition. Having seen the success of our Sugar Creek and Movement School, I am eager to help provide more opportunities to east Charlotte through a second replication at Movement School East.

6. What is your understanding of the appropriate role of a public charter school board member?

The board member helps with developing long term and short term strategy and then monitors progress towards those goals that were set. Board members are also integral in establishing the school through the culture, the facility, and the policies for all operations, finances, and governance.

7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I've served on several boards, and I think I bring a thoughtful, active, and engaging approach to my participation. I don't have specific school board experience, but I am very well versed and educated inside the charter school space. I've also spent considerable time interacting with leadership for a local charter school in Charlotte.

8. Describe the specific knowledge and experience that you would bring to the board.

I have worked in many capacities in the financial services industry as well as owning small businesses. I have been recognized as a Certified Financial Analyst and also hold the position of Chief Investment Officer for a multi-billion dollar company in Charlotte, NC. I can provide value in the financial stewardship of the school as well as facility expertise due to previous experience.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

Provide exceptional educational opportunities for low income students. As a collective board and other stakeholders in the community who are invested in the success of Movement School East, we believe that education will break the cycle of poverty for our students and their families.

2. What is your understanding of the school's proposed educational program?

We are replicating Sugar Creek Charter School so we are leaning on the successes of their proven educational programming focused on low income students. The educational program is intended to reach students in this target demographic by emphasizing high academic expectations, character development, and authentic relationships. All programming will be in accordance with state and federal laws and mandates.

3. What do you believe to be the characteristics of a successful school?

I believe a successful school has a talented and committed staff as well as a culture that is embraced from the top down. Successful schools operate with high expectations and are constantly working towards the best ways to engage students and families towards positive outcomes. I also believe that successful schools are competitive. There has to be a certain edge to constantly want to be the best and outperform their peers.

4. How will you know that the school is succeeding (or not) in its mission?

Test scores and other growth and performance metrics are the easiest way to measure what most would deem success, however I believe it is more than that. I will know that the school is succeeding when the staff enjoys coming to work, when parents recommend our school to their friends, when students are developing into local leaders within their classrooms and communities, and when there is a waiting list for Movement School East. Strictly from a performance standpoint, we will measure success primarily with how we compare to schools within CMS, and secondarily to schools within CMS who have a similar demographic.

Governance

1. Describe the role that the board will play in the school's operation.
The board will work behind the scenes to help guide the school towards its long term goals. This includes financial management, facility management, curriculum oversight, operational efficiency, and setting school policy. While not as involved in the day-to-day operational tasks, the board will help develop the framework with which the day to day tasks integrate.
2. How will you know if the school is successful at the end of the first year of operation?
If the staff begin to embrace in the culture and there is little turnover I believe that we will be working towards successful outcomes. Academic growth and performance scores that have met our goals and exceeds that of our peers will be considered a success. Also, students displaying character traits that have been taught in Movement School East will be a big indicator of success.
3. How will you know at the end of five years of the schools is successful?
90% proficiency for all students is our main goal at the end of year five. Once we achieve this particular performance goal we will know this school has been overwhelmingly successful. Outside of performance, I will feel it has been a success after five years if we have less than a 10% attrition rate, our staff and students have fully embraced our culture, and there have been authentic relationships established between students, staff and parents.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
Hiring the best available talent and creating sustainable financial solutions for school operations are a top priority. Getting a great facility will also be important. Another way to ensure that the school is successful is through creating policies and operational framework that makes implementation simple and effective.
5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?
I would talk to the board chairman to voice my concerns and work with them to determine if it is actually happening. If the concern revolved around the board chair then I would meet with a few other board members to discuss. If we discovered that something was happening we would collectively decide on the best way to move forward.

*Please include the following with your Information Form

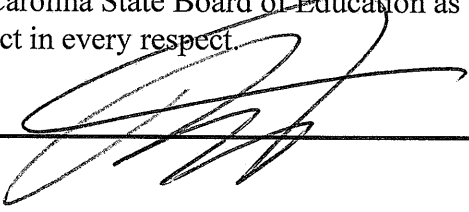
- a one page resume
- a national criminal background check

*If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action taken and the license validity.

Certification

I, Bretton McDonough, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Movement School East is true and correct in every respect.

Signature



9/8/17

Date

**BYLAWS
OF
Movement School**

Charlotte, NC 28214

**BYLAWS
OF
Movement School**

I. OBJECTIVES AND PURPOSES

- I.1. PURPOSES. The purposes for which the corporation is organized are exclusively educational and cultural within the meaning of §501(c)(3) of the Internal Revenue Code of 1986 or the corresponding provision of any future United States Internal Revenue Law (“Internal Revenue Code”). More specifically, the corporation is formed to enrich the lives of young people of all cultural, racial and economic backgrounds, through educational experiences of the highest quality. The corporation shall carry on only those activities permitted to be carried on by an organization which is exempt from taxation under the provisions of §501(c)(3) of the Internal Revenue Code.
- I.2. BROAD AUTHORITY. In carrying out the objects enumerated in Section I. 1, the board of directors of the corporation from time to time shall have broad authority and discretion to use the funds and property belonging to the corporation in such manner as shall to them seem most conducive to those ends.
- I.3. PROHIBITIONS ON ACTIVITIES. Notwithstanding any other provision of these Bylaws, of the Articles of Incorporation of the corporation, or of any action taken by the board of directors, no part of the net earnings or funds of the corporation shall inure to the benefit of any private shareholder, member or individual, and no part of the activities of the corporation shall be the carrying on of propaganda or otherwise attempting to influence legislation, except as is otherwise expressly permitted by the Internal Revenue Code and by law; nor shall the corporation intervene in any political campaign on behalf of any candidate for public office. The corporation shall act in such manner as to maintain its status as a tax exempt educational and cultural corporation under the provisions of §501(c)(3) the Internal Revenue Code with specific reference to the requirements and prohibitions of its Articles of Incorporation.

II. STOCKHOLDERS

II.1. NO STOCKHOLDERS. The corporation shall not have stockholders.

III. MEMBERSHIP

III.1. NO MEMBERS. The corporation shall not have members.

IV. BOARD OF DIRECTORS

IV.1. GENERAL POWERS. The affairs of the corporation shall be managed by or under the direction of its board of directors.

IV.2. NUMBER, TENURE AND QUALIFICATIONS. The number of directors shall be at least seven (5), but not more than fifteen (15), excluding ex-officio and emeritus members of the board of directors. The right to elect, select, or remove directors shall be vested in the board of directors of the corporation, as hereinafter provided. The directors of the corporation shall serve for a term of three (3) years with terms of approximately onethird (1/3) of the directors constituting the board of directors to expire each year. Directors shall be elected as the need arises. Except as otherwise specifically determined by the board of directors of the corporation, a director shall be eligible to serve on the board of directors for up to two (2) consecutive three (3) year terms. After the maximum service period has expired, such director must cease to serve for at least one (1) year before becoming eligible for reelection to the board of directors of the corporation.

IV.3. EX-OFFICIO DIRECTORS. The School Director and Chief Operating Officer shall be exofficio members of the board of directors of the corporation. Additionally, the board of directors of the corporation may also, from time to time, by a majority vote, appoint to the board of directors as an ex-officio director any person who it may deem desirable to be a member of the board of directors in their capacity as a representative of another organization or by reason of holding a particular position in the community. Any ex-officio director shall have all rights, excluding the right to vote, of directors elected in accordance with the provisions of these Bylaws; provided, however, that the term of an exofficio member of the board of directors shall not exceed one (1) year from the

time of his or her appointment, subject to reappointment by the board of directors as provided for herein.

IV.4. EMERITUS DIRECTORS. Upon recommendation from the Nominating and Governance Committee, the board of directors may confer by majority vote the status of Emeritus Board Member on persons who have demonstrated unique and extraordinary commitment and service to the corporation. Emeritus Board Members may but are not required to attend meetings of the board of directors. Emeritus Board Members do not have voting rights, do not count toward a quorum or for attendance at meetings, and do not count toward the minimum or maximum number of directors on the board. The status of Emeritus Board Member may be removed with or without cause by the affirmative vote of two-thirds of the board of directors of the corporation then in office.

IV.5. ELECTION OF DIRECTORS. Members of the board of directors of the corporation shall be elected as required. The board of directors of the corporation shall determine on a recurring basis by majority vote the number of directors to be elected in addition to the ones specified. When the number has been determined, nominations shall be received from the Nominating and Governance Committee and those persons receiving the highest number of votes shall be elected.

IV.6. MEETINGS. At the beginning of each fiscal year the board of directors of the corporation shall establish a calendar of its regularly scheduled board meetings for that year, and set forth the time and place of each such meetings. A copy of that calendar shall be maintained by the School Director in the school office, and notice thereof shall be published on the school website. An annual meeting of the board of directors of the corporation shall be held in the month of June of each calendar year to approve the budget and elect officers.

IV.7. SPECIAL MEETINGS. Special and emergency meetings of the board of directors may be called by or at the written request of the Chair or at least three (3) directors of the corporation. The person or persons authorized to call special or emergency meetings of the board may fix any convenient location as the place for holding such special or emergency meetings of the board called by them. A calendar of all special meetings and their locations shall be maintained by the

School Director in the school office, and notice thereof shall be published on the school's website at least 48 hours prior to such special meetings. In addition, notice of all emergency meetings shall be emailed or faxed to all media who may have requested such notice in advance of those meetings.

IV.8. NOTICE. Notice of any meeting of the board of directors of the corporation shall be given at least three (3) days prior thereto by written notice to each director at his or her address as shown by the records of the corporation, except that no meeting of directors to remove a director, to dismiss the School Director, or to amend the Articles of Incorporation or these Bylaws of the corporation may be held unless written notice of the proposed action is delivered to all directors then in office of the corporation at least fourteen (14) days prior to such meeting. If mailed, any notice under this Section shall be deemed to be delivered when deposited in the United States mail in a sealed envelope so addressed, with postage thereon prepaid. If notice is given by telegram or by facsimile, such notice shall be deemed to be delivered when the telegram is delivered to the telegram company or when the facsimile is received at the number furnished by the director. Notice of any meeting of the board of directors may be waived in writing signed by each person entitled to the notice either before or after the time of the meeting. The attendance of a director at any meeting shall constitute a waiver of notice of such meeting, except where a director attends a meeting for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened. Neither the business to be transacted at, nor the purpose of, any regular or special meeting of the board need be specified in the notice or waiver of notice of such meeting, unless specifically required by law or by these Bylaws.

IV.9. QUORUM. A majority of the directors of the corporation in office shall constitute a quorum for the transaction of business at any meeting of the board of directors, provided that if less than a majority of the directors are present at said meeting, a majority of the directors present may adjourn the meeting to another time without further notice.

IV.10. MANNER OF ACTING. The act of a majority of the directors present at a meeting at which a quorum is present shall be the act of the board of directors of the corporation, unless the act of a greater number is required by statute, these Bylaws or by the Articles of Incorporation.

- IV.11. **DIRECTOR PARTICIPATION IN MEETING BY TELECOMMUNICAITONS.** Directors may participate in and act at any additional regular or special board meeting by conference telephone or other communication equipment by means of which all persons participating in the meeting can communicate with each other, and participation in a meeting pursuant to this section shall constitute presence in person at such meeting.
- IV.12. **VOTING.** Each member of the board of directors shall be entitled to one (1) vote; excluding emeritus and ex officio members.
- IV.13. **VACANCIES.** Any vacancy occurring in the board of directors of the corporation to be filled by reason of an increase in the number of directors or because of a vacancy on the board shall be filled by the board of directors of the corporation at any regular or special meeting of the board of directors upon recommendation of the Nominating and Governance Committee or upon nomination by any director, unless the Articles of Incorporation, a statute, or these Bylaws provide that a vacancy or a directorship so created shall be filled in some other manner, in which case such provision shall control. A director elected or appointed, as the case may be, to fill a vacancy shall be elected for the unexpired term of his or her predecessor in office.
- IV.14. **RESIGNAITON AND REMOVAL OF DIRECTORS.** A director may resign at any time or may be removed with or without cause by the affirmative vote of the majority of the directors of the corporation then in office.
- IV.15. **LOSS OF MEMBERSHIP ON THE BOARD OF DIRECTORS.** A director who is absent from three (3) consecutive regular meetings of the board of directors without having been excused by the Chair MAY lose his or her membership on the board of directors, provided that such director shall first have been notified in writing by the Secretary that he or she has been absent from two (2) consecutive regular meetings of the board of directors and such notice shall refer to this Section IV.14 of the Bylaws.
- IV.16. **PRESUMPTION OF ASSENT.** A director of the corporation who is present at a meeting of the board of directors of the corporation at which action on any matter of the corporation is taken shall be conclusively presumed to have

assented to the action taken unless his or her dissent shall be entered in the minutes of the meeting or unless he or she shall file his or her written dissent to such action with the person acting as the Secretary of the meeting before the adjournment thereof or shall forward such dissent by registered or certified mail to the Secretary of the corporation immediately after the adjournment of the meeting. Such right to dissent shall not apply to a director who voted in favor of such action.

- IV.17. CONFLICT OF INTEREST. The Board shall adopt, and periodically review and revise as may be necessary, an appropriate “Conflict of Interest” policy, which shall apply to the actions of the directors, officers and employees of the corporation. Such policy shall require that any person with a financial or other material interest in any proposed or existing relationship or transaction with the corporation (a) disclose such interest and (b) refrain from participation in any decisions relating to such relationship or transaction. In addition, all members of the Board shall, at least annually, complete and execute a Conflict of Interest Disclosure Statement in which they acknowledge their familiarity, and commitment to comply, with that policy.

V. OFFICERS

- V.1. OFFICERS. The officers of the corporation shall be a Chair, a Vice Chair, a Secretary and a Treasurer and such other officers as may be elected or appointed by the board of directors. Officers whose authority and duties are not described in these Bylaws shall have the authority and perform the duties prescribed, from time to time, by the board of directors of the corporation. The same person may hold any two (2) offices except those Chair and Secretary. All officers must be members of the board of directors of the corporation.
- V.2. ELECTION AND TERM OF OFFICE. The officers of the corporation shall be elected annually by the board of directors of the corporation at the annual meeting of the board of directors upon nomination from the Nominating and Governance Committee or from any member of the board of directors of the corporation. If the election of officers shall not be held at such meeting, such election shall be held as soon thereafter as conveniently may be possible. Vacancies may be filled or new offices created and filled at any meeting of the board of directors of the corporation. Each officer shall hold office until his or her successor shall have been duly elected and shall have qualified or until his or

her death or until he or she shall resign or shall have been removed in the manner hereinafter provided.

- V.3. REMOVAL. Any officer elected or appointed by the board of directors of the corporation may be removed by the affirmative vote of a majority of the board of directors of the corporation then in office whenever in its judgment the best interests of the corporation would be served thereby.
- V.4. CHAIR. The Chair shall be the principal officer of the corporation. Subject to the direction and control of the board of directors, he or she shall, when present, preside at all meetings of the board of directors and, with the assistance of the board of directors, establish the agenda for all meetings. The Chair shall appoint and be an exofficio member of all committees and other boards. The Chair shall, with the Secretary or any other officer of the corporation authorized by the board of directors, execute any deed, mortgage, lease, bond or other instrument which the board of directors has authorized to be executed, except in cases where the signing and execution thereof shall be expressly delegated by the board of directors or by these Bylaws to some other officer or agent of the corporation, or shall be required by law to be otherwise signed or executed. The Chair shall perform all duties incident to the office of Chair and such other duties as may be prescribed by the board of directors of the corporation.
- V.5. VICE CHAIR. The Vice Chair shall perform such duties which may be specified by the board of directors of the corporation and/or by the Chair.
- V.6. SECRETARY. The Secretary shall (a) record the minutes, or provide for the recording, of the minutes of all meetings of the board of directors of the corporation in one or more books provided for that purpose; (b) see that all notices are duly given in accordance with the provisions of these Bylaws or as required by law; (c) be a custodian of the corporate records and of the seal of the corporation; (d) chair the Nominating and Governance Committee; and (e) perform all the duties incident to the office of Secretary and such other duties as from time to time may be assigned to him or her by the Chair or by the board of directors of the corporation.
- V.7. TREASURER. The Treasurer shall (a) shall oversee and supervise the corporation's accounting practices and financial operations employees; (b) shall be responsible for the maintenance of adequate books of account for the

corporation; (c) have charge over all funds and securities of the corporation, and be responsible therefore, and for the receipt and disbursement thereof; (d) chair the Finance Committee; (e) present reports of the corporation's financial information to the board of directors on a regular and timely basis; and (f) perform all the duties incident to the office of Treasurer and such other duties as from time to time may be assigned to him or her by the Chair or by the board of directors of the corporation.

VI. SCHOOL DIRECTOR AND CHIEF OPERATING OFFICER

VI.1. The School Director shall be the principal professional employee of the corporation, and shall have plenary oversight and authority over all employees of the corporation, including, but not limited to, the authority to employ and discharge any and all of the employees of the corporation. The Chief Operating Officer shall have oversight and authority as may be assigned to that position by the School Director. Additionally, these officers shall perform such duties as from time to time may be assigned to them by the Chair or the board of directors of the corporation.

VII. COMMITTEES

VII.1. EXECUTIVE COMMITTEE. The Executive Committee shall be a standing committee of the corporation. The Executive Committee shall consist of the officers of the corporation, and such members-at-large as selected by the Chair. The number of members of the Executive Committee shall not, in any event, exceed seven (7) in number. The Executive Committee shall manage the affairs of the corporation between meetings of the board of directors. It shall do so in accordance with the policies of the corporation as established by the board of directors. The Executive Committee shall have and exercise the authority of the board of directors of the corporation in the management of the corporation; provided, however, the board of directors may by resolution limit the authority of the Executive Committee and all actions of the Executive Committee shall be reported to the board of directors of the corporation. The Chair or, in his or her

absence, the Vice Chair or any other appointed Executive Committee member shall preside at the meetings of the Executive Committee.

- VII.2. NOMINATING AND GOVERNANCE COMMITTEE. The Nominating and Governance Committee shall be a standing committee of the corporation. This Committee shall be chaired by the Secretary of the board, consist of not less than two (2), nor more than five (5), members of the board of directors of the corporation and/or such other persons as the Chair may designate, as appointed by the Chair. The Nominating and Governance Committee shall have the responsibility and authority to nominate members of the board of directors, recommend to the board of directors of the corporation a slate of officers of the corporation and the responsibility and authority to propose changes to the bylaws, policies and practices to ensure compliance with current North Carolina statutes and regulations.
- VII.3. FINANCE COMMITTEE. The Finance Committee shall be a standing committee of the corporation. It shall be chaired by the Treasurer of the board, consist of not less than two (2), nor more than five (5), members of the board of directors of the corporation and/or such other persons as the Chair may designate, as appointed by the Chair. The Finance Committee shall assist in the preparation of the annual budget of the corporation and shall have such other responsibilities with respect to the financial affairs of the corporation as are conferred upon it from time to time by the board of directors of the corporation.
- VII.4. OTHER COMMITTEES. In addition to the Executive Committee, the Nominating and Governance Committee and the Finance Committee provided for in Sections VII.1, VII.2, and VII.3 above, which shall be standing committees, the board of directors of the corporation, by resolution adopted by a majority of the directors of the corporation then in office, may designate one or more liaison persons or special committees, each of which will consist of one (1) or more directors of the corporation and/or such other persons as the Chair designates. All such committee members shall be appointed by the Chair and shall serve at the pleasure of the board of directors of the corporation.
- VII.5. TERM OF OFFICE. Each member of a committee shall serve as such until his or her successor is appointed, unless the committee shall be sooner terminated, or unless such member is removed from such committee by the board of directors of the corporation by the affirmative vote of a majority of directors then in office.

- VII.6. CHAIR. One (1) member of each committee shall be appointed chair of the committee; provided, however, that the Chair shall serve as the chair of the Executive Committee.
- VII.7. VACANCIES. Vacancies in the membership of any committee may be filled by appointment by the Chair, and as approved by the chair of the Committee.
- VII.8. QUORUM. Unless otherwise provided in the resolution of the board of directors of the corporation designating the committee, a majority of the committee members present shall constitute a quorum and the act of a majority of the members present at a meeting at which a quorum is present shall be the act of the committee.
- VII.9. RULES. Each committee may adopt rules for its own government not inconsistent with these Bylaws or with rules adopted by the board of directors of the corporation.
- VII.10. INFORMAL ACTION. The authority of a committee may be exercised without a meeting if consent in writing setting forth the action taken is signed by all the members entitled to vote.

VIII. BOARD OF ADVISORS

- VIII.1. The board of directors of the corporation shall, by resolution adopted by a majority of the directors of the corporation, appoint a Board of Advisors to the corporation. The Board of Advisors shall consist of those Directors Emeritus, or prominent persons determined by the board of directors to be in a position to further the purposes of the corporation. The Board of Advisors shall serve at the pleasure of the board of directors of the corporation. The board of directors may consult with the Board of Advisors from time to time on matters of importance to the corporation.

IX. CONTRACTS, CHECKS, DEPOSITS AND FUNDS

- IX.1. CONTRACTS. The board of directors of the corporation may authorize any officer or officers, agent or agents of the corporation, in addition to the officers so authorized by these Bylaws, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the corporation and such authority may be general or confined to specific instances.

- IX.2. CHECKS, DRAFTS, ETC. All checks, drafts or other orders for the payment of money, notes or other evidences of indebtedness issued in the name of the corporation shall be signed by such other officer or officers, agent or agents of the corporation and in such manner as shall from time to time be determined by resolution of the board of directors of the corporation. In the absence of such determination by the board of directors of the corporation, such instruments shall be signed by the Treasurer and countersigned by the Chair or Vice-Chair of the corporation.
- IX.3. DEPOSITS. All funds of the corporation shall be deposited from time to time to the credit of the corporation in such banks, trust companies, or other depositories as the board of directors of the corporation may select.
- IX.4. GIFTS. The board of directors of the corporation or the Chair of the corporation may accept on behalf of the corporation any contribution, gift, bequest or devise for the general purposes or for any special purpose of the corporation.

X. BOOKS AND RECORDS

- X.1. The corporation shall keep correct and complete financial books and records of account and shall also keep minutes of the proceedings of its board of directors and all committees. All books and records of the corporation may be inspected by any member of the board of directors of the corporation or by any officer of the corporation for any proper purpose at any reasonable time. A complete audit of all financial records of the corporation shall be made within a reasonable time of the end of the fiscal year of the corporation by an auditor selected by the board of directors of the corporation.

XI. FISCAL YEAR

- XI.1. The fiscal year of the corporation shall be July 1st to June 30th of the succeeding year.

XII. SEAL

XII.1. The corporate seal shall have inscribed thereon at least the name of the corporation. The seal may be used by causing it or a facsimile thereof to be impressed or affixed or in any other manner reproduced, provided that the affixing of the corporate seal to an instrument shall not give the instrument additional force or effect, or change the construction thereof, and the use of the corporate seal is not mandatory.

XIII. WAIVER OF NOTICE

XIII.1. Whenever any notice is required to be given under the provisions of Chapter 55A of the General Statutes of North Carolina or under the provisions of the Articles of Incorporation or these Bylaws of the corporation, a waiver thereof in writing, signed by the person or persons entitled to such notice, whether before or after the time stated herein, shall be deemed equivalent to the giving of such notice. Attendance at any meeting shall constitute waiver of notice thereof unless the person at the meeting objects to the holding of the meeting because proper notice was not given.

XIV. INDEMNIFICATION

XIV.1. **DIRECTORS, OFFICERS, EMPLOYEES OR AGENTS.** The corporation shall indemnify any director, officer, employee or agent to the maximum extent permitted by the provisions of North Carolina General Statute Sections 55A8.50-.58 and 55A-16-21, inclusive, the terms of which are hereby incorporated by reference.

XIV.2. **INDEMNIFICATION NOT EXCLUSIVE.** The indemnification provided by this Article shall not be deemed exclusive of any other rights to which those seeking indemnification may be entitled under any bylaw, agreement, vote of disinterested directors, or otherwise, both as to action in his or her official capacity and as to action in another capacity while holding such office, and shall continue as to a person who has ceased to be a director, officer, employee or agent, and shall inure to the benefit of the heirs, executors and administrators of such a person.

XIV.3. INSURANCE. The corporation may purchase and maintain insurance on behalf of any person who is or was a director, officer, employee or agent of the corporation, or who is or was serving at the request of the corporation as a director, officer, employee or agent of another corporation, partnership, joint venture, trust or other enterprise, against any liability asserted against such person and incurred by such person in any such capacity, or arising out of his or her status as such, whether or not the corporation would have the power to indemnify such person against such liability under the provisions of this Article.

XV. AMENDMENTS

XV.1. The power to alter, amend, or repeal these Bylaws or adopt new Bylaws shall be vested in the board of directors of the corporation, unless otherwise provided in the Articles of Incorporation or the Bylaws. Such action may be taken at a regular or special meeting for which written notice of the purpose shall be given at least fourteen (14) days in advance and shall only be taken upon an affirmative vote of at least two-thirds of the board of directors of the corporation then in office. The Bylaws may contain any provisions for the regulation and management of the affairs of the corporation not inconsistent with law or the Articles of Incorporation.

* Movement School and its Board of Directors is committed to upholding all applicable state and federal laws. Specifically, Movement School and its Board of Directors is committed to recognizing Open Meetings Law G.S. §143-318.9 and abiding by this statute in accordance with all other by-laws as stipulated above.

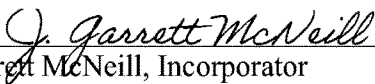
**ARTICLES OF INCORPORATION
OF
MOVEMENT CHARTER SCHOOL
(A NONPROFIT CORPORATION)**

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

1. The name of the corporation is Movement Charter School.
2. The corporation is a charitable corporation within the meaning of N.C.G.S. §55A-1-40(4).
3. The purposes for which the corporation is organized are:
 - (A) To operate exclusively for charitable and educational purposes within the meaning of Sections 501(c)(3) and 170(c)(2) of the Internal Revenue Code of 1986 or the corresponding provisions of any future United States Internal Revenue laws (the "Code"); and
 - (B) To engage in any lawful activity for which corporations may be organized under Chapter 55A of the General Statutes of North Carolina so long as the corporation does not engage in any activity or activities not in furtherance of one or more tax exempt purposes as contemplated in section 501(c)(3) of the Code.
4. The corporation shall have no members.
5. The number, qualifications, and method of election of the Directors shall be set forth in the bylaws of the corporation. The initial Directors will be elected by the Incorporator.
6. No part of the net earnings of the corporation shall be distributable to or inure to the benefit of its officers or Directors or any private person, except that the corporation shall be authorized to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of its exempt purposes. No substantial part of the activities of the corporation shall be the carrying on of propaganda or otherwise attempting to influence legislation (except to the extent permitted by Section 501(h) of the Code), and the corporation shall not participate in or intervene in (including the publication or distribution of statements) any political campaign on behalf of any candidate for public office. Notwithstanding any other provision hereof, the corporation shall not carry on any other activities not permitted to be carried on (1) by a corporation exempt from federal income tax under Section 501(c)(3) of the Code or (2) by a corporation to which contributions are deductible under Section 170(c)(2) of the Code.

7. In the event of termination, dissolution, or winding up of the affairs of the corporation in any manner or for any reason whatsoever, the Directors shall, after paying or making provision for payment of all liabilities of the corporation, distribute all of the remaining assets of the corporation as such Directors may determine among one or more organizations that are then organized and operated for exempt purposes and qualified as exempt organizations under Section 501(c)(3) of the Code and to which contributions are then deductible under Section 170(c)(2) of the Code or to federal, state, and local governments to be used exclusively for public purposes.
8. The address of the initial registered office and mailing address of the corporation are 11405 N. Community House Rd, Charlotte, NC 28277, in the County of Mecklenburg. The name of the initial registered agent of the corporation at such address is Casey Crawford.
9. The address of the initial principal office and mailing address of the corporation is 11405 N. Community House Rd, Charlotte, NC 28277.
10. To the full extent from time to time permitted by law, no person who is serving or who has served as a Director of the corporation shall be personally liable for any action for monetary damages for breach of his or her duty as a Director. Neither the amendment or repeal of this Article, nor the adoption of any provision of these Articles of Incorporation inconsistent with this Article, shall eliminate or reduce the protection afforded by this Article to a Director of the corporation with respect to any matter that occurred, or any cause of action, suit, or claim that but for this Article would have accrued or risen, prior to such amendment, repeal, or adoption.
11. The name and address of the Incorporator are Garrett McNeill, 11405 N Community House Rd. Charlotte, NC 28277, in the County of Mecklenburg.
12. The business email address of the corporation is: g *Privacy Redaction*
13. These articles will be effective upon filing.

This is the 17th day of September 2015.



Garrett McNeill, Incorporator

Proposal of Insurance

Movement Charter School Prospect Number MOWC856869 for 07/01/2017 to 07/01/2018

MOVEMENT INSURANCE
Bradley Davis - Indian Land, SC
Phone Number: 877-587-5327
Fax#: 704-837-7317

Classification Analyst: Ryann Nance
Extension: 1300 / e-mail: SBUTeam@GUARD.com
Phone Number: 570-825-9900
Fax Number: 570-820-7968

We are very interested in providing coverage on this account. If you would like to discuss any portion of this proposal to ensure that we have the best possible chance of success, we encourage you to call us.

Carrier:	NorGUARD Insurance Company
Coverage Option:	Guaranteed Cost
Payment Method:	Direct Bill
Limits Emp Liability:	500,000/500,000/500,000

Total Estimated Cost: 12,007.00

(This amount is subject to any pending rate changes or required premium modifications, and is based on the most current information available to us.)

Information Needed to Issue:

No information needed to issue your policy has currently been identified. If we subsequently recognize a need, we will contact you with our request.

Important Notes:

- * This proposal can only be accepted by our receipt of the payment quoted above by the due date; otherwise, no coverage will be provided and our offer will expire. Our only offer of insurance is stated by the terms of this proposal and can only be changed by our issuance of a revised proposal.
- * Covered terrorism losses would be partially reimbursed by the United States Government under a formula established by the Act. Under this formula, the United States Government would pay 85% of covered terrorism losses exceeding our insurer deductible. The premium charged for the coverage this policy provides for insured terrorism losses is included in the amount shown in the Policy Totals included with this proposal.
- * Signed Officer Exclusion forms must be in our office within 30 days of the policy inception date.
- * Applicable in Tennessee and Vermont: It is a crime to knowingly provide false, incomplete or misleading information to any party to a workers compensation transaction for the purpose of committing fraud. Penalties include imprisonment, fines and denial of insurance benefits.
- * Any person who knowingly and with intent to defraud any insurance company or another person files an application for insurance or statement of claim containing any materially false information, or conceals for the purpose of misleading information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime and subject the person to criminal and [NY: Substantial] civil penalties. (Specific language not applicable in CO, FL, HI, MA, NE, OH, OK, OR, TN or VT; in DC, LA, ME, VA and WA, insurance benefits may also be denied).
- * Final premium calculations may include amounts you pay to subcontractors (including sole proprietors without employees) who do not have their own workers compensation coverage, because such subcontractors and/or their employees can file claims against you that we are required to defend or pay under the terms of your policy.

Your Business is Our Businesssm

Featuring toll-free telephone reporting of claims (888-NEW-CLMS), 24 hours a day, 7 days a week.

Movement Charter School
Prospect Number MOWC856869
Renewal of NEW for 07/01/2017 to 07/01/2018

Rating Work Sheet

North Carolina

Classification	Code	Premium Basis: Total Estimated Annual Remuneration	Rate per \$100 Remuneration	Estimated Annual Premium
Effective: 07/01/2017-07/01/2018				
SCHOOL-PROF. EMPLOYEES & CLERICAL	8868	1,499,630.00	0.63	9,448
COLLEGE/SCHOOL: ALL OTHER EMPLOYEES	9101	65,000.00	3.78	2,457
Increased Limits Emp Liability, 500K/500K/500K	9807		0.8%	95
Premium Discount			6.358%	-763
Total Estimated Annual Premium for NC				11,237

Policy Totals

Total Estimated Standard Premium for North Carolina	11,237
Expense Constant	210
Terrorism NC 9740 0.0158 1,564,630	247
Catastrophe 9741 0.02 1,564,630	313
Minimum Premium NC \$850	
Total Estimated Annual Premium	12,007
Total Estimated Cost for MOWC856869	12,007



UTICA NATIONAL INSURANCE GROUP
 GRAPHIC ARTS MUTUAL INSURANCE CO.
 180 GENESEE STREET
 NEW HARTFORD, NY 13413

R0802
 MOVEMENT INSURANCE
 8024 CALVIN HALL ROAD
 INDIAN LAND, SC 29707
 (704) 409-7997

POLICY NUMBER: CPP 5069262

NAMED INSURED: THE MOVEMENT SCHOOL

ADDRESS:

FORM OF BUSINESS: ORGANIZATION OTHER THAN PARTNERSHIP OR JOINT VENTURE

BUSINESS DESCRIPTION: CHARTER SCHOOL

POLICY PERIOD: FROM 07-01-17 TO 07-01-18 12:01 A.M. Standard Time at your address shown above.

In return for the payment of the premium and subject to all the terms of this policy, we agree with you to provide the insurance as stated in this policy.

COMMERCIAL GENERAL LIABILITY COVERAGE PART - DECLARATIONS

LIMITS OF INSURANCE

General Aggregate Limit (Other Than Products-Completed Operations)	\$ 3,000,000
Products-Completed Operations Aggregate Limit	\$ 3,000,000
Personal and Advertising Injury Limit	\$ 1,000,000
Each Occurrence Limit	\$ 1,000,000
Damage To Premises Rented To You Limit	\$ 1,000,000
Medical Expense Limit (Any One Person)	\$ 10,000

LOCATIONS OF ALL PREMISES OTHER THAN THE ADDRESS SHOWN ABOVE WHICH YOU OWN, RENT OR OCCUPY ARE LISTED ON COMMERCIAL GENERAL LIABILITY DECLARATIONS - CONTINUED

ADVANCE PREMIUM \$ 8,192.00

FORMS AND ENDORSEMENTS APPLYING TO THIS COVERAGE PART:

TOTAL ADVANCE PREMIUM \$ 8,192.00

SEE 8-S-1018


 Authorized Representative

CPP CG 08 0 5069262



UTICA NATIONAL INSURANCE GROUP

GRAPHIC ARTS MUTUAL INSURANCE CO.
180 GENESEE STREET
NEW HARTFORD, NY 13413

R0802
MOVEMENT INSURANCE
8024 CALVIN HALL ROAD
INDIAN LAND, SC 29707
(704) 409-7997

POLICY NUMBER: CPP 5069262

NAMED INSURED: THE MOVEMENT SCHOOL

ADDRESS:

BUSINESS DESCRIPTION: CHARTER SCHOOL

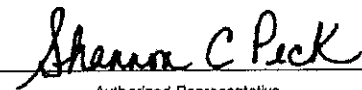
POLICY PERIOD: FROM 07-01-17 TO 07-01-18 12:01 A.M. Standard Time at your address shown above.

In return for the payment of the premium and subject to all terms of this policy, we agree with you to provide the insurance as stated in this policy.

COMMERCIAL PACKAGE POLICY — COMMON POLICY DECLARATIONS

THIS POLICY CONSISTS OF THE FOLLOWING COVERAGE PARTS FOR WHICH A PREMIUM IS INDICATED. THIS PREMIUM MAY BE SUBJECT TO ADJUSTMENT.

	PREMIUM
Commercial Property Coverage Part	\$ 1,213.00
Commercial General Liability Coverage Part	\$ 8,192.00
Commercial Crime Coverage Part	\$ 64.00
Commercial Inland Marine Coverage Part	\$ 64.00
Commercial Auto Coverage Part	\$
TOTAL	\$ 9,533.00


Authorized Representative

CPP 08 0 5069262

THESE DECLARATIONS TOGETHER WITH THE COMMON POLICY CONDITIONS, COVERAGE PART DECLARATIONS, COVERAGE PART COVERAGE FORM(S) AND FORMS AND ENDORSEMENTS, IF ANY, ISSUED TO FORM A PART THEREOF, COMPLETE THE ABOVE NUMBERED POLICY.

8-D-CL Ed. 06-92
BILLING NO. 201366053

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07-11-17 YOUR BILL WILL FOLLOW 03

POLICY NUMBER: CPP 5069262

Item No.	Locations/Classifications	Code No. St.-Terr.	Premium Basis	Rates		Advance Premium	
				OTHER	PR/CO	OTHER	PR/CO
001A	SCHOOLS - PUBLIC - ELEMENTARY, KINDER-GARTEN OR JUNIOR HIGH - PRODUCTS - COMPLETED OPERATIONS ARE SUBJECT TO THE GENERAL AGGREGATE LIMIT 2701-C FREEDOM DRIVE CHARLOTTE, NC 28208	47471 NC-002	PUPILS	300	PER PUPIL		INCLUDED
002A	SCHOOLS - FACULTY LIABILITY FOR CORPORAL PUNISHMENT OF PUPILS - PRODUCTS - COMPLETED OPERATIONS ARE SUBJECT TO THE GENERAL AGGREGATE LIMIT 2701-C FREEDOM DRIVE CHARLOTTE, NC 28208	47469 NC-002	FACULTY MEMBER	28	PER FACULTY MEMBER		INCLUDED
003A	DAY CARE CENTERS - NOT-FOR-PROFIT ONLY - PRODUCTS - COMPLETED OPERATIONS ARE SUBJECT TO THE GENERAL AGGREGATE LIMIT CG2240 2701-C FREEDOM DRIVE CHARLOTTE, NC 28208	41716 NC-002	PERSONS	150	PER PERSON		INCLUDED
003B	8E3633 CRISIS EVENT EXPENSE COVERAGE	44444 NC-002					INCLUDED
005B	8D1848 ABUSE OR MOLESTATION LIABILITY COVERAGE PART(INCLUDING SEXUAL MISCOND	47471 NC-002					INCLUDED
013B	8D1213 SCHOOL DISTRICT AND EDUCATORS LEGAL LIABILITY INSURANCE DECLARATIONS	47471 NC-002					INCLUDED
014B	8E1657 SDELL- ADDITIONAL DEFENSE COVERAGE ENDORSEMENT	47471 NC-002					INCLUDED

Total Advance Other and PR/CO

TOTAL ADVANCE PREMIUM

ITEM LETTER CODE

- A = HAZARD
- B = FORM
- C = FLAT CHARGE

COMMERCIAL GENERAL LIABILITY DECLARATIONS-CONTINUED

POLICY NUMBER: CPP 5069262

Item No.	Locations/Classifications	Code No. St.-Terr.	Premium Basis	Rates		Advance Premium	
				OTHER	PR/CO	OTHER	PR/CO
017B	8D2636 EMPLOYMENT RELATED PRACTICES- LIABILITY INSURANCE DECLARATION	67082 NC-002				INCLUDED	
018B	8E3767 HIRED AUTO AND NON-OWNED AUTO LIABILITY	44444 NC-002				INCLUDED	

Total Advance Other and PR/CO \$ 8,192
TOTAL ADVANCE PREMIUM \$ 8,192

ITEM LETTER CODE

- A = HAZARD
- B = FORM
- C = FLAT CHARGE

POLICY NUMBER: CPP 5069262

COMMERCIAL AUTO LIABILITY
COMMERCIAL GENERAL LIABILITY
COMMERCIAL INLAND MARINE
COMMERCIAL PROPERTY
BUSINESSOWNERS
CRIME

SUPPLEMENTAL DECLARATIONS

Named Insured: THE MOVEMENT SCHOOL

Forms and Endorsements applying to this Coverage Part and made part of this policy at time of issue:

FORM -----	EDITION -----	TITLE -----
CG2240	01/96	EXCLUSION - MEDICAL PAYMENTS TO CHILDREN DAY CARE CENTERS
8E3042	07/16	EDUCATIONAL INSTITUTION COVERAGE-EXCLUDING STUDENT MEDICAL E
8E3633	07/16	CRISIS EVENT EXPENSE COVERAGE
8C1848	11/01	ABUSE OR MOLESTATION LIABILITY COVERAGE FORM
8D1848	09/99	ABUSE OR MOLESTATION LIABILITY COVERAGE PART(INCLUDING SEXUA
8C1213	01/04	SDELL COVERAGE FORM
8D1213	07/01	SCHOOL DISTRICT AND EDUCATORS LEGAL LIABILITY INSURANCE DECL
8E1657	01/05	SDELL - ADDITIONAL DEFENSE COVERAGE ENDORSEMENT
8C2636	07/98	EMPLOYMENT RELATED PRACTICES- LIABILITY COVERAGE FORM
8D2636	09/09	EMPLOYMENT RELATED PRACTICES- LIABILITY INSURANCE DECLARATIO
8E3767	10/10	HIRED AUTO AND NON-OWNED AUTO LIABILITY
8E3674	05/09	EXCLUSION RECORDING & DISTRIBUTION OF MATERIAL OR INFO IN VI
8E3498	01/04	ABUSE OR MOLESTATION EXCLUSION
8E3857	07/14	KNOWLEDGE OF WRONGFUL ACTS
8E3786	07/14	AMENDATORY ENDORSEMENT CHANGES TO SDELL COVERAGE FORM
8E3553	01/09	LIMITED COVERAGE FOR SPOUSES AND DOMESTIC PARTNERS
8E3676	12/08	LAW ENFORCEMENT AND SECURITY OFFICER COVERAGE
8E4105	07/17	WHO IS AN INSURED-CHANGES
CG2170	01/15	CAP ON LOSSES FROM CERTIFIED ACTS OF TERRORISM
CG2106	05/14	EXCLUSION-ACCESS OR DISCLOSURE OF CONFIDENTIAL/PERSONAL INFO
CG2001	04/13	PRIMARY AND NONCONTRIBUTORY OTHER INSURANCE CONDITION
CG0001	04/13	COMMERCIAL GENERAL LIABILITY COVERAGE FORM
CG2426	04/13	AMENDMENT OF INSURED CONTRACT DEFINITION
ILO021	09/08	NUCLEAR ENERGY LIABILITY
ILO269	09/08	NORTH CAROLINA CHANGES - CANCELLATION AND NONRENEWAL
8E3202	01/02	ASBESTOS EXCLUSION
ILO985	01/15	DISCLOSURE PURSUANT TO TERRORISM RISK INSURANCE
ILO017	11/98	COMMON POLICY CONDITIONS
8E2370	05/00	ABUSE OR MOLESTATION EXCLUSION
8E3502	01/04	EXCLUSION- SILICA LIABILITY HAZARD
CG2167	12/04	FUNGI OR BACTERIA EXCLUSION
CG2147	12/07	EMPLOYEE RELATED PRACTICES EXCLUSION



Tim Hurley
8024 Calvin Hall Rd.
Indian Land, SC 29707
704-245-5914

To Whom It May Concern:

The Movement Foundation recognizes the critical importance of quality education in low-income communities. As a part of our mission, we are committed to helping resource organizations who are working in these communities as a part of a broader effort towards community revitalization in Charlotte. We have already committed and given over \$10 million towards initiatives in this area. Our foundation has decided to invest in Movement School East in east Charlotte, as we believe it has the ability to greatly impact and positively alter the lives of residents in the community.

On behalf of the Movement Foundation, we would like to extend the following offer to Movement School East in Charlotte, NC. Movement Foundation will:

- purchase reasonable facility as mutually agreed upon by the board of directors and head of school for Movement School East. The facility will be located in east Charlotte and will be identified and up-fit or built solely through Movement Foundation with no ownership interests given towards Movement School East.
- purchase the initial 4 buses for the school. (All on-going maintenance will be the responsibility of Movement School East.)
- purchase the initial furniture, fixtures and equipment up to a limit of \$2 million to enable the school to operate grades k-2 inclusive, but not limited to,
 - phone system
 - furniture
 - technology needs
 - school supplies
- provide free rent on the facility for years 1 & 2
- Subsidize 50% of rent on the facility for year 3 & 4
- Beginning in year 5 and beyond the Movement Foundation will charge well below market rent for the facility.

We are excited to forge this new partnership in east Charlotte and look forward to the impact this will have in our community.

A handwritten signature in black ink that reads "Tim Hurley". The signature is written in a cursive style with a long horizontal line extending to the right.

Tim Hurley
Executive Director of Education, Movement Foundation

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter Social Security numbers on this form as it may be made public.
▶ Information about Form 990 and its instructions is at www.irs.gov/form990.

2013

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

A For the 2013 calendar year, or tax year beginning Jul 1, 2013, and ending Jun 30, 2014

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization <u>Sugar Creek Charter School</u> Doing Business As _____ Number and street (or P.O. box if mail is not delivered to street address) <u>4101 N Tryon Street</u> Room/suite _____ City or town, state or province, country, and ZIP or foreign postal code <u>Charlotte NC 28206</u>	D Employer Identification Number <u>56-2077708</u> E Telephone number <u>(704) 509-5470</u> G Gross receipts <u>\$ 8,367,448.</u>
F Name and address of principal officer: <u>Bruce Major 4101 N Tryon Charlotte NC 28206</u>		H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all subordinates included? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'No,' attach a list. (see instructions) H(c) Group exemption number ▶ _____
I Tax-exempt status <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) () (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		
J Website: <u>N/A</u>		
K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶ _____		L Year of formation: <u>1997</u> M State of legal domicile: <u>NC</u>

Part I Summary

	1 Briefly describe the organization's mission or most significant activities: <u>Operate a public charter school.</u>			
Activities & Governance	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.			
	3 Number of voting members of the governing body (Part VI, line 1a)	3		11
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4		11
	5 Total number of individuals employed in calendar year 2013 (Part V, line 2a)	5		201
	6 Total number of volunteers (estimate if necessary)	6		2
	7a Total unrelated business revenue from Part VIII, column (C), line 12	7a		0.
	b Net unrelated business taxable income from Form 990-T, line 34	7b		
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year	
	9 Program service revenue (Part VIII, line 2g)	7,577,016.	8,242,352.	
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	26,772.	24,852.	
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	127.	62.	
	12 Total revenue — add lines 8 through 11 (must equal Part VIII, column (A), line 12)	7,707,926.	8,367,448.	
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)			
	14 Benefits paid to or for members (Part IX, column (A), line 4)			
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	5,180,881.	5,898,281.	
	16a Professional fundraising fees (Part IX, column (A), line 11e)			
	b Total fundraising expenses (Part IX, column (D), line 25) ▶ <u>22,875.</u>			
17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	2,608,942.	2,382,382.		
18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	7,789,823.	8,280,663.		
19 Revenue less expenses. Subtract line 18 from line 12	-81,897.	86,785.		
Net Assets of Fund Balances	20 Total assets (Part X, line 16)	Beginning of Current Year	End of Year	
	21 Total liabilities (Part X, line 26)	8,319,043.	9,015,530.	
	22 Net assets or fund balances. Subtract line 21 from line 20	6,357,093.	6,966,795.	
		1,961,950.	2,048,735.	

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer: Rich Bovard
 Date: January 27, 2015
 Type or print name and title: Rich Bovard Treasurer

Paid Preparer Use Only

Print/Type preparer's name <u>Darrell L. Keller</u>	Preparer's signature <u>Darrell L. Keller</u>	Date <u>01/13/15</u>	Check <input type="checkbox"/> if self-employed	PTIN <u>P00153428</u>
Firm's name ▶ <u>Darrell L. Keller, CPA, PA</u>	Firm's EIN ▶ <u>51-0471443</u>		Phone no. <u>(704) 739-0771</u>	
Firm's address ▶ <u>P.O. Box 1028</u> <u>Kings Mountain NC 28086</u>				

May the IRS discuss this return with the preparer shown above? (see instructions) Yes No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

1 Briefly describe the organization's mission:

Operate a public charter school.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? Yes No
If 'Yes,' describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes No
If 'Yes,' describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4 a (Code: _____) (Expenses \$ 6,062,239. including grants of \$ _____ 0.) (Revenue \$ 8,367,448.)

Operation of a charter school in Charlotte, North Carolina serving approximately 1,200 students in grades K through 10.

4 b (Code: _____) (Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

4 c (Code: _____) (Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

4 d Other program services. (Describe in Schedule O.)
(Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

4 e Total program service expenses ▶ 6,062,239.

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If 'Yes,' complete Schedule A	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?		X
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If 'Yes,' complete Schedule C, Part II		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If 'Yes,' complete Schedule C, Part III		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If 'Yes,' complete Schedule D, Part I		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If 'Yes,' complete Schedule D, Part II		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If 'Yes,' complete Schedule D, Part III		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If 'Yes,' complete Schedule D, Part IV		X
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If 'Yes,' complete Schedule D, Part V		X
11 If the organization's answer to any of the following questions is 'Yes', then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings and equipment in Part X, line 10? If 'Yes,' complete Schedule D, Part VI	X	
b Did the organization report an amount for investments — other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VII		X
c Did the organization report an amount for investments — program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VIII		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part IX		X
e Did the organization report an amount for other liabilities in Part X, line 25? If 'Yes,' complete Schedule D, Part X		X
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If 'Yes,' complete Schedule D, Part X		X
12a Did the organization obtain separate, independent audited financial statements for the tax year? If 'Yes,' complete Schedule D, Parts XI, and XII	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? If 'Yes,' and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI and XII is optional		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E	X	
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If 'Yes,' complete Schedule F, Parts I and IV		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If 'Yes,' complete Schedule F, Parts II and IV		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If 'Yes,' complete Schedule F, Parts III and IV		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If 'Yes,' complete Schedule G, Part I (see instructions)		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If 'Yes,' complete Schedule G, Part II		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If 'Yes,' complete Schedule G, Part III		X
20 a Did the organization operate one or more hospital facilities? If 'Yes,' complete Schedule H		X
b If 'Yes' to line 20a, did the organization attach a copy of its audited financial statements to this return?		

Part IV Checklist of Required Schedules (continued)

	Yes	No
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organizations or government on Part IX, column (A), line 1? <i>If 'Yes,' complete Schedule I, Parts I and II</i>		X
22 Did the organization report more than \$5,000 of grants or other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If 'Yes,' complete Schedule I, Parts I and III</i>		X
23 Did the organization answer 'Yes' to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If 'Yes,' complete Schedule J</i>		X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If 'Yes,' answer lines 24b through 24d and complete Schedule K. If 'No,' go to line 25a</i>	X	
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		X
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		X
d Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year?		X
25a Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If 'Yes,' complete Schedule L, Part I</i>		X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If 'Yes,' complete Schedule L, Part I</i>		X
26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If so, complete Schedule L, Part II</i>		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If 'Yes,' complete Schedule L, Part III</i>		X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
b A family member of a current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If 'Yes,' complete Schedule M</i>		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If 'Yes,' complete Schedule M</i>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If 'Yes,' complete Schedule N, Part I</i>		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If 'Yes,' complete Schedule N, Part II</i>		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If 'Yes,' complete Schedule R, Part I</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If 'Yes,' complete Schedule R, Parts II, III, IV, and V, line 1</i>		X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
b If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>		X
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If 'Yes,' complete Schedule R, Part VI</i>		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O	X	

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Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V

Table with columns for question number, description, and Yes/No boxes. Includes sections for backup withholding, employee reporting, foreign accounts, prohibited transactions, and charitable contributions.

Part VI Governance, Management and Disclosure For each 'Yes' response to lines 2 through 7b below, and for a 'No' response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI. [X]

Section A. Governing Body and Management

Table with columns for line number, description, and Yes/No boxes. Includes lines 1a through 9.

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

Table with columns for line number, description, and Yes/No boxes. Includes lines 10a through 16b.

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed North Carolina
18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection.
19 Describe in Schedule O whether (and if so, how) the organization makes its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: Acadia Northstar Main Street Rutherfordton, NC 28139 (828) 287-7897

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1 a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of 'key employee.'
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) George H Edmiston Dir	2.00	X					0.	0.	0.	
(2) Velva Woolen Dir	2.00	X					0.	0.	0.	
(3) J Franklin Martin Chair	5.00	X		X			0.	0.	0.	
(4) Vernon Sumter Dir	2.00	X					0.	0.	0.	
(5) Herbert L Harriss Director	5.00	X					0.	0.	0.	
(6) Lynn Simonini Director	2.00	X					0.	0.	0.	
(7) Richard L Bovard Sec./Treasurer	5.00	X		X			0.	0.	0.	
(8) Scott A Stover Director	2.00	X					0.	0.	0.	
(9) Richard Vinroot Director	2.00	X					0.	0.	0.	
(10) Whitney Wertz Director	2.00	X					0.	0.	0.	
(11) Charles East Director	2.00	X					0.	0.	0.	
(12) Cheryl Turner School Director	40.00					X	126,649.	0.	0.	
(13) Bruce Major Business Director	40.00					X	116,062.	0.	0.	
(14)										

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) -----										
(16) -----										
(17) -----										
(18) -----										
(19) -----										
(20) -----										
(21) -----										
(22) -----										
(23) -----										
(24) -----										
(25) -----										
1 b Sub-total							242,711.	0.	0.	
c Total from continuation sheets to Part VII, Section A										
d Total (add lines 1b and 1c)							242,711.	0.	0.	

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **2**

	Yes	No
3 Did the organization list any former officer, director, or trustee, key employee, or highest compensated employee on line 1a? <i>If 'Yes,' complete Schedule J for such individual</i>	3	X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If 'Yes' complete Schedule J for such individual</i>	4	X
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If 'Yes,' complete Schedule J for such person</i>	5	X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514	
CONTRIBUTIONS, GIFTS, GRANTS AND OTHER SIMILAR AMOUNTS	1 a Federated campaigns	1 a					
	b Membership dues	1 b					
	c Fundraising events	1 c					
	d Related organizations	1 d					
	e Government grants (contributions) . .	1 e 8,099,977.					
	f All other contributions, gifts, grants, and similar amounts not included above . .	1 f 142,375.					
	g Noncash contributions included in lines 1a-1f: \$						
	h Total. Add lines 1a-1f ▶		8,242,352.				
PROGRAM SERVICE REVENUE	Business Code						
	2 a <u>Food Services</u>	900099	24,852.	24,852.	0.	0.	
	b						
	c						
	d						
	e						
	f All other program service revenue . . .						
	g Total. Add lines 2a-2f ▶		24,852.				
OTHER REVENUE	3 Investment income (including dividends, interest and other similar amounts) ▶		62.	62.	0.	0.	
	4 Income from investment of tax-exempt bond proceeds . . ▶						
	5 Royalties ▶						
	6 a Gross rents	(i) Real	(ii) Personal				
		b Less: rental expenses					
		c Rental income or (loss) . .					
		d Net rental income or (loss) ▶					
	7 a Gross amount from sales of assets other than inventory .	(i) Securities	(ii) Other				
		b Less: cost or other basis and sales expenses					
		c Gain or (loss)					
		d Net gain or (loss) ▶					
	8 a Gross income from fundraising events (not including . . \$ _____ of contributions reported on line 1c). See Part IV, line 18.	a					
		b Less: direct expenses	b				
		c Net income or (loss) from fundraising events ▶					
	9 a Gross income from gaming activities. See Part IV, line 19.	a					
b Less: direct expenses		b					
c Net income or (loss) from gaming activities ▶							
10 a Gross sales of inventory, less returns and allowances	a						
	b Less: cost of goods sold	b					
	c Net income or (loss) from sales of inventory ▶						
Miscellaneous Revenue		Business Code					
11 a <u>School activities</u>	900099	100,182.	100,182.	0.	0.		
b <u>Sales Tax refund</u>	900099	0.	0.	0.	0.		
c <u>Others</u>	900099	0.	0.	0.	0.		
d All other revenue							
e Total. Add lines 11a-11d ▶		100,182.					
12 Total revenue. See instructions ▶		8,367,448.	125,096.	0.	0.		

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States. See Part IV, line 21				
2 Grants and other assistance to individuals in the United States. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16				
4 Benefits paid to or for members.				
5 Compensation of current officers, directors, trustees, and key employees				
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).				
7 Other salaries and wages.	5,102,547.	4,565,616.	536,931.	0.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).	79,422.	76,605.	2,817.	0.
9 Other employee benefits	272,558.	256,300.	16,258.	0.
10 Payroll taxes	443,754.	391,955.	51,799.	0.
11 Fees for services (non-employees):				
a Management				
b Legal	15,925.	0.	15,925.	0.
c Accounting	8,750.	0.	8,750.	0.
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amt exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)				
12 Advertising and promotion	13,608.	0.	13,608.	0.
13 Office expenses	102,036.	55,357.	46,679.	0.
14 Information technology	30,220.	30,220.	0.	0.
15 Royalties				
16 Occupancy	142,351.	1,125.	141,226.	0.
17 Travel	166.	166.	0.	0.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	155,090.	155,090.	0.	0.
20 Interest	213,642.	0.	213,642.	0.
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	456,865.	100,531.	356,334.	0.
23 Insurance	71,038.	31,129.	39,909.	0.
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a <u>Contracted Services</u>	215,773.	116,921.	98,852.	0.
b <u>Supplies</u>	208,352.	155,061.	30,416.	22,875.
c <u>Other</u>	27,725.	24,577.	3,148.	0.
d <u>Food Service</u>	301,239.	0.	301,239.	0.
e All other expenses	419,602.	101,586.	318,016.	0.
25 Total functional expenses. Add lines 1 through 24e.	8,280,663.	6,062,239.	2,195,549.	22,875.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X

		(A) Beginning of year		(B) End of year	
ASSETS	1	Cash — non-interest-bearing	513,341.	1	315,052.
	2	Savings and temporary cash investments		2	
	3	Pledges and grants receivable, net		3	
	4	Accounts receivable, net	255,432.	4	313,558.
	5	Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L		6	
	7	Notes and loans receivable, net		7	
	8	Inventories for sale or use		8	
	9	Prepaid expenses and deferred charges	53,182.	9	17,383.
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 11,648,074.		
	b	Less: accumulated depreciation	10b 3,278,537.		
	11	Investments — publicly traded securities	7,497,088.	10c	8,369,537.
	12	Investments — other securities. See Part IV, line 11		11	
	13	Investments — program-related. See Part IV, line 11		12	
	14	Intangible assets		13	
	15	Other assets. See Part IV, line 11		14	
16	Total assets. Add lines 1 through 15 (must equal line 34)	8,319,043.	15	9,015,530.	
LIABILITIES	17	Accounts payable and accrued expenses	79,728.	16	297,058.
	18	Grants payable		17	
	19	Deferred revenue		18	78,875.
	20	Tax-exempt bond liabilities	4,881,664.	19	4,674,996.
	21	Escrow or custodial account liability. Complete Part IV of Schedule D		20	
	22	Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		21	
	23	Secured mortgages and notes payable to unrelated third parties	1,395,701.	22	1,915,866.
	24	Unsecured notes and loans payable to unrelated third parties		23	
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D		24	
	26	Total liabilities. Add lines 17 through 25	6,357,093.	25	6,966,795.
NET ASSETS OR FUND BALANCES	Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.				
	27	Unrestricted net assets	742,228.	26	270,060.
	28	Temporarily restricted net assets	1,219,722.	27	1,778,675.
	29	Permanently restricted net assets		28	
	Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.				
	30	Capital stock or trust principal, or current funds		29	
	31	Paid-in or capital surplus, or land, building, or equipment fund		30	
	32	Retained earnings, endowment, accumulated income, or other funds		31	
33	Total net assets or fund balances.	1,961,950.	32	2,048,735.	
34	Total liabilities and net assets/fund balances	8,319,043.	33	9,015,530.	

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Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI.

1	Total revenue (must equal Part VIII, column (A), line 12)	1	8,367,448.
2	Total expenses (must equal Part IX, column (A), line 25)	2	8,280,663.
3	Revenue less expenses. Subtract line 2 from line 1	3	86,785.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	1,961,950.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	2,048,735.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

		Yes	No
1	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked 'Other,' explain in Schedule O.		
2 a	Were the organization's financial statements compiled or reviewed by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		X
2 b	Were the organization's financial statements audited by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	X	
2 c	If 'Yes' to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.		X
3 a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	X	
3 b	If 'Yes,' did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits	X	

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SCHEDULE A
(Form 990 or 990-EZ)

Public Charity Status and Public Support

OMB No. 1545-0047

2013

Department of the Treasury
Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ.

▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Open to Public Inspection

Name of the organization Sugar Creek Charter School	Employer identification number 56-2077708
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Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1 A church, convention of churches or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: _____
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 An organization that normally receives: (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions — subject to certain exceptions, and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 An organization organized and operated exclusively for the benefit of, to perform the functions of, or carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h.
 - a Type I b Type II c Type III — Functionally integrated d Type III — Non-functionally integrated
- e By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f If the organization received a written determination from the IRS that is a Type I, Type II or Type III supporting organization, check this box
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

	Yes	No
(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?	11 g (i)	
(ii) A family member of a person described in (i) above?	11 g (ii)	
(iii) A 35% controlled entity of a person described in (i) or (ii) above?	11 g (iii)	

h Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in column (i) listed in your governing document?		(v) Did you notify the organization in column (i) of your support?		(vi) Is the organization in column (i) organized in the U.S.?		(vii) Amount of monetary support
			Yes	No	Yes	No	Yes	No	
(A)									
(B)									
(C)									
(D)									
(E)									
Total									

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule A (Form 990 or 990-EZ) 2013

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2009	(b) 2010	(c) 2011	(d) 2012	(e) 2013	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any 'unusual grants.')						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge.						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2009	(b) 2010	(c) 2011	(d) 2012	(e) 2013	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ▶ <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2013 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2012 Schedule A, Part II, line 14	15	%
16 a 33-1/3% support test — 2013. If the organization did not check the box on line 13, and the line 14 is 33-1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
b 33-1/3% support test — 2012. If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
17 a 10%-facts-and-circumstances test — 2013. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and stop here. Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
b 10%-facts-and-circumstances test — 2012. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and stop here. Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ <input type="checkbox"/>		

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal yr beginning in) ▶	(a) 2009	(b) 2010	(c) 2011	(d) 2012	(e) 2013	(f) Total
1 Gifts, grants, contributions and membership fees received. (Do not include any 'unusual grants'.)						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal yr beginning in) ▶	(a) 2009	(b) 2010	(c) 2011	(d) 2012	(e) 2013	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 Total Support. (Add lns 9,10c, 11 and 12.)						

14 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**.

Section C. Computation of Public Support Percentage

15 Public support percentage for 2013 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2012 Schedule A, Part III, line 15.	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2013 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2012 Schedule A, Part III, line 17	18	%

19a **33-1/3% support tests — 2013.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization.

b **33-1/3% support tests — 2012.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization.

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions.

SCHEDULE D (Form 990)

Supplemental Financial Statements

OMB No. 1545-0047

2013

Open to Public Inspection

Complete if the organization answered 'Yes,' to Form 990, Part IV, lines 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b. Attach to Form 990.

Information about Schedule D (Form 990) and its instructions is at www.irs.gov/form990.

Department of the Treasury Internal Revenue Service Name of the organization

Employer identification number

Sugar Creek Charter School

56-2077708

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 6.

Table with 2 columns: (a) Donor advised funds, (b) Funds and other accounts. Rows include: 1 Total number at end of year, 2 Aggregate contributions to (during year), 3 Aggregate grants from (during year), 4 Aggregate value at end of year, 5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?, 6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?

Part II Conservation Easements.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 7.

Form with questions 1-9 regarding conservation easements. Question 1 asks for purpose(s) of conservation easements. Question 2 asks for details of conservation easements held. Question 3 asks for modified, transferred, released, extinguished, or terminated easements. Question 4 asks for number of states where property is located. Question 5 asks for written policy regarding monitoring. Question 6 asks for staff and volunteer hours. Question 7 asks for amount of expenses. Question 8 asks if each easement satisfies requirements of section 170(h)(4)(B)(i) and (ii). Question 9 asks for reporting details.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 8.

Form with questions 1a-1b and 2a-2b regarding collections of art, historical treasures, or other similar assets. Question 1a asks for text of footnote if not reported. Question 1b asks for amounts relating to these items. Question 2 asks for amounts required to be reported.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

- 3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):
- a Public exhibition
 - b Scholarly research
 - c Preservation for future generations
 - d Loan or exchange programs
 - e Other _____
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? Yes No

Part IV Escrow and Custodial Arrangements. Complete if the organization answered 'Yes' to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1 a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? Yes No
- b If 'Yes,' explain the arrangement in Part XIII and complete the following table:
- | | Amount |
|---------------------------------|--------|
| c Beginning balance | 1 c |
| d Additions during the year | 1 d |
| e Distributions during the year | 1 e |
| f Ending balance | 1 f |
- 2 a Did the organization include an amount on Form 990, Part X, line 21? Yes No
- b If 'Yes,' explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII

Part V Endowment Funds. Complete if the organization answered 'Yes' to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1 a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

- a Board designated or quasi-endowment %
- b Permanent endowment %
- c Temporarily restricted endowment %

The percentages in lines 2a, 2b, and 2c should equal 100%.

3 a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

	Yes	No
(i) unrelated organizations	3a(i)	
(ii) related organizations	3a(ii)	

b If 'Yes' to 3a(ii), are the related organizations listed as required on Schedule R? **3b**

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment. Complete if the organization answered 'Yes' to Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1 a Land		413,666.		413,666.
b Buildings		9,291,816.	1,982,393.	7,309,423.
c Leasehold improvements				
d Equipment		1,942,592.	1,296,144.	646,448.
e Other				
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).)				8,369,537.

Part VII Investments – Other Securities.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other _____		
(A) _____		
(B) _____		
(C) _____		
(D) _____		
(E) _____		
(F) _____		
(G) _____		
(H) _____		
(I) _____		
Total. (Column (b) must equal Form 990, Part X, column (B) line 12.) . . . ▶		

Part VIII Investments – Program Related.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment type	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) _____		
(2) _____		
(3) _____		
(4) _____		
(5) _____		
(6) _____		
(7) _____		
(8) _____		
(9) _____		
(10) _____		
Total. (Column (b) must equal Form 990, Part X, column (B) line 13.) . . . ▶		

Part IX Other Assets.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) _____	
(2) _____	
(3) _____	
(4) _____	
(5) _____	
(6) _____	
(7) _____	
(8) _____	
(9) _____	
(10) _____	
Total. (Column (b) must equal Form 990, Part X, column (B), line 15.) ▶	

Part X Other Liabilities.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25

(a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) _____	
(3) _____	
(4) _____	
(5) _____	
(6) _____	
(7) _____	
(8) _____	
(9) _____	
(10) _____	
(11) _____	
Total. (Column (b) must equal Form 990, Part X, column (B) line 25.) . . . ▶	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements		1	8,367,448.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
	a Net unrealized gains on investments	2 a		
	b Donated services and use of facilities	2 b		
	c Recoveries of prior year grants	2 c		
	d Other (Describe in Part XIII.)	2 d		
	e Add lines 2a through 2d		2 e	
3	Subtract line 2e from line 1		3	8,367,448.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
	a Investment expenses not included on Form 990, Part VIII, line 7b	4 a		
	b Other (Describe in Part XIII.)	4 b		
	c Add lines 4a and 4b		4 c	
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)		5	8,367,448.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements.		1	8,280,663.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
	a Donated services and use of facilities	2 a		
	b Prior year adjustments	2 b		
	c Other losses	2 c		
	d Other (Describe in Part XIII.)	2 d		
	e Add lines 2a through 2d		2 e	
3	Subtract line 2e from line 1		3	8,280,663.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
	a Investment expenses not included on Form 990, Part VIII, line 7b	4 a		
	b Other (Describe in Part XIII.)	4 b		
	c Add lines 4a and 4b		4 c	
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)		5	8,280,663.

Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

SCHEDULE E
(Form 990 or 990-EZ)

Schools

OMB No. 1545-0047

2013

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

▶ **Complete if the organization answered 'Yes' to Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.**
▶ **Attach to Form 990 or Form 990-EZ.**

▶ **Information about Schedule E (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.**

Name of the organization

Sugar Creek Charter School

Employer identification number

56-2077708

Part I

	YES	NO
1 Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?	X	
2 Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?	X	
3 Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If 'Yes,' please describe. If 'No,' please explain. If you need more space, use Part II <u>Included in all advertisements, brochures</u> <u>and school applications.</u>	X	
4 Does the organization maintain the following?		
a Records indicating the racial composition of the student body, faculty, and administrative staff?	X	
b Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?	X	
c Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	X	
d Copies of all material used by the organization or on its behalf to solicit contributions? If you answered 'No' to any of the above, please explain. If you need more space, use Part II.	X	
5 Does the organization discriminate by race in any way with respect to:		
a Students' rights or privileges?		X
b Admissions policies?		X
c Employment of faculty or administrative staff?		X
d Scholarships or other financial assistance?		X
e Educational policies?		X
f Use of facilities?		X
g Athletic programs?		X
h Other extracurricular activities? If you answered 'Yes' to any of the above, please explain. If you need more space, use Part II.		X
6 a Does the organization receive any financial aid or assistance from a governmental agency?	X	
b Has the organization's right to such aid ever been revoked or suspended? If you answered 'Yes' to either line 6a or line 6b, explain on Part II.		X
7 Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If 'No,' explain on Part II	X	

SCHEDULE K (Form 990)

Supplemental Information on Tax Exempt Bonds

2013

Open to Public Inspection

Complete if the organization answered 'Yes' on Form 990, Part IV, line 24a. Provide descriptions, explanations, and any additional information in Part VI. Attach to Form 990. See separate instructions. Information about Schedule K (Form 990) and its instructions is at www.irs.gov/form990.

Department of the Treasury Internal Revenue Service

Employer identification number

56-2077708

Name of the organization

Sugar Creek Charter School

Part I Bond Issues

Table with columns: (a) Issuer Name, (b) Issuer EIN, (c) CUSIP #, (d) Date issued, (e) Issue price, (f) Description of purpose, (g) Defeased, (h) On behalf of issuer, (i) Pooled financing. Row 1: North Carolina Capital Facilities Finance Agency, 56-1592154, None, 10/27/10, 5,300,000, Capital Expenditures, X, X, X.

Part II Proceeds

Table with columns: A, B, C, D. Rows 1-13: Amount of bonds retired, Amount of bonds legally defeased, Total proceeds of issue, Gross proceeds in reserve funds, Capitalized interest from proceeds, Proceeds in refunding escrows, Issuance costs from proceeds, Credit enhancement from proceeds, Working capital expenditures from proceeds, Capital expenditures from proceeds, Other spent proceeds, Other unspent proceeds, Year of substantial completion.

Part III Private Business Use

Table with columns: A, B, C, D. Rows 14-17: Were the bonds issued as part of a current refunding issue?, Were the bonds issued as part of an advance refunding issue?, Has the final allocation of proceeds been made?, Does the organization maintain adequate books and records to support the final allocation of proceeds?, Was the organization a partner in a partnership, or a member of an LLC, which owned property financed by tax-exempt bonds?, Are there any lease arrangements that may result in private business use of bond-financed property?

Part III Private Business Use (Continued)

	A		B		C		D	
	Yes	No	Yes	No	Yes	No	Yes	No
3 a								
b								
c								
d								
4								
5								
6								
7								
8 a								
b								
c								
9								

Part IV Arbitrage

	A		B		C		D	
	Yes	No	Yes	No	Yes	No	Yes	No
1								
2								
a								
b								
c								
3								
4 a								
b								
c								
d								
e								

Part IV Arbitrage (Continued)

	A		B		C		D	
	Yes	No	Yes	No	Yes	No	Yes	No
5 a	Were gross proceeds invested in a guaranteed investment contract (GIC)?							
b	Name of provider							
c	Term of GIC							
d	Was the regulatory safe harbor for establishing the fair market value of the GIC satisfied?							
6	Were any gross proceeds invested beyond an available temporary period?							
7	Has the organization established written procedures to monitor the requirements of section 148?							

Part V Procedures To Undertake Corrective Action

	A		B		C		D	
	Yes	No	Yes	No	Yes	No	Yes	No
	Has the organization established written procedures to ensure that violations of federal tax requirements are timely identified and corrected through the voluntary closing agreement program if self-remediation is not available under applicable regulations?							

Part VI Supplemental Information. Provide additional information for responses to questions on Schedule K (see instructions).

Schedule K (Form 990) 2013 Sugar Creek Charter School

Part VI Supplemental Information. Provide additional information for responses to questions on Schedule K (see instructions) (Continued)

Lined area for supplemental information.

SCHEDULE O
(Form 990 or 990-EZ)

Supplemental Information to Form 990 or 990-EZ

OMB No. 1545-0047

2013

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.
▶ Attach to Form 990 or 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Name of the organization

Employer identification number

Sugar Creek Charter School

56-2077708

Pt VI, Line 11b Form 990 is reviewed prior to filing.

Pt VI, Line 12c Conflict of interest statements are signed annually.

Pt VI, Line 15b Salaries are compared to other charter schools.

Pt XI Prior years loan closing costs written off.

Pt VI, Line 15a Salaries are compared to other charter schools.

Return of Organization Exempt From Income Tax
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)
Do not enter social security numbers on this form as it may be made public.
Information about Form 990 and its instructions is at www.irs.gov/form990.

2014

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

A For the 2014 calendar year, or tax year beginning Jul 1, 2014, and ending Jun 30, 2015

B Check if applicable: Address change, Name change, Initial return, Final return/terminated, Amended return, Application pending
C Name of organization: Sugar Creek Charter School
D Employer identification number: 56-2077708
E Telephone number: (704) 509-5470
G Gross receipts: \$10,122,434
F Name and address of principal officer: Bruce Major 4101 N Tryon Charlotte NC 28206
H(a) Is this a group return for subordinates? Yes No
H(b) Are all subordinates included? Yes No
I Tax-exempt status: X 501(c)(3) 501(c) () (insert no.) 4947(a)(1) or 527
J Website: N/A
K Form of organization: X Corporation Trust Association Other
L Year of formation: 1997
M State of legal domicile: NC

K Form of organization: X Corporation Trust Association Other
L Year of formation: 1997
M State of legal domicile: NC

Part I Summary

Table with 3 columns: Description, Prior Year, Current Year. Rows include: 1 Briefly describe the organization's mission or most significant activities: Operate a public charter school. 2 Check this box if the organization discontinued its operations or disposed of more than 25% of its net assets. 3-7a Revenue and expense items. 8-12 Revenue items. 13-19 Expenses. 20-22 Net Assets or Fund Balances.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here: Signature of officer J Franklin Martin, Date 02/11/16, Title Chair
Paid Preparer Use Only: Print/Type preparer's name Darrell L. Keller, Preparer's signature Darrell L. Keller, Date 02/10/16, Check self-employed, PTIN P00153428, Firm's name Darrell L. Keller, CPA, PA, Firm's address P.O. Box 1028, Kings Mountain NC 28086, Firm's EIN 51-0471443, Phone no. (704) 739-0771

May the IRS discuss this return with the preparer shown above? (see instructions) X Yes No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

1 Briefly describe the organization's mission:

Operate a public charter school.

2 Did the organization undertake any significant program services during the year which were not listed on the prior

Form 990 or 990-EZ? Yes No

If 'Yes,' describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?

Yes No

If 'Yes,' describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4 a (Code:) (Expenses \$ 7,352,951. including grants of \$ 0.) (Revenue \$ 9,695,676.)

Operation of a charter school in Charlotte, North Carolina serving approximately 1,200 students in grades K through 10.

4 b (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4 c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4 d Other program services. (Describe in Schedule O.)

(Expenses \$ including grants of \$) (Revenue \$)

4 e Total program service expenses 7,352,951.

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If 'Yes,' complete Schedule A.</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> (see instructions)?		X
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If 'Yes,' complete Schedule C, Part I.</i>		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If 'Yes,' complete Schedule C, Part II.</i>		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If 'Yes,' complete Schedule C, Part III.</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If 'Yes,' complete Schedule D, Part I.</i>		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If 'Yes,' complete Schedule D, Part II.</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If 'Yes,' complete Schedule D, Part III.</i>		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If 'Yes,' complete Schedule D, Part IV.</i>		X
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If 'Yes,' complete Schedule D, Part V.</i>		X
11 If the organization's answer to any of the following questions is 'Yes', then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings and equipment in Part X, line 10? <i>If 'Yes,' complete Schedule D, Part VI.</i>	X	
b Did the organization report an amount for investments — other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If 'Yes,' complete Schedule D, Part VII.</i>		X
c Did the organization report an amount for investments — program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If 'Yes,' complete Schedule D, Part VIII.</i>		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If 'Yes,' complete Schedule D, Part IX.</i>		X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If 'Yes,' complete Schedule D, Part X.</i>		X
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If 'Yes,' complete Schedule D, Part X.</i>		X
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If 'Yes,' complete Schedule D, Parts XI, and XII.</i>	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If 'Yes,' and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI and XII is optional.</i>		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If 'Yes,' complete Schedule E.</i>	X	
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If 'Yes,' complete Schedule F, Parts I and IV.</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If 'Yes,' complete Schedule F, Parts II and IV.</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If 'Yes,' complete Schedule F, Parts III and IV.</i>		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If 'Yes,' complete Schedule G, Part I (see instructions).</i>		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If 'Yes,' complete Schedule G, Part II.</i>		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If 'Yes,' complete Schedule G, Part III.</i>		X
20 a Did the organization operate one or more hospital facilities? <i>If 'Yes,' complete Schedule H.</i>		X
b If 'Yes' to line 20a, did the organization attach a copy of its audited financial statements to this return?		

Part IV Checklist of Required Schedules (continued)

	Yes	No
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If 'Yes,' complete Schedule I, Parts I and II</i>		X
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If 'Yes,' complete Schedule I, Parts I and III</i>		X
23 Did the organization answer 'Yes' to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If 'Yes,' complete Schedule J</i>		X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If 'Yes,' answer lines 24b through 24d and complete Schedule K. If 'No,' go to line 25a</i>		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If 'Yes,' complete Schedule L, Part I</i>		X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If 'Yes,' complete Schedule L, Part I</i>		X
26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If 'Yes,' complete Schedule L, Part II</i>		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If 'Yes,' complete Schedule L, Part III</i>		X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
b A family member of a current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If 'Yes,' complete Schedule M</i>		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If 'Yes,' complete Schedule M</i>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If 'Yes,' complete Schedule N, Part I</i>		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If 'Yes,' complete Schedule N, Part II</i>		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If 'Yes,' complete Schedule R, Part I</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If 'Yes,' complete Schedule R, Part II, III, or IV, and Part V, line 1</i>		X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
b If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>		X
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If 'Yes,' complete Schedule R, Part VI</i>		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V

		Yes	No
1 a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable		
1 a	15		
1 b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
1 b	0		
1 c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	
2 a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
2 a	198		
2 b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	X	
Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)			
3 a	Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
3 b	If 'Yes' has it filed a Form 990-T for this year? If 'No' to line 3b, provide an explanation in Schedule O		
4 a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
4 b	If 'Yes,' enter the name of the foreign country: ▶ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts. (FBAR)		
5 a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
5 b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
5 c	If 'Yes,' to line 5a or 5b, did the organization file Form 8886-T?		
6 a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		X
6 b	If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7 Organizations that may receive deductible contributions under section 170(c).			
7 a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		X
7 b	If 'Yes,' did the organization notify the donor of the value of the goods or services provided?		
7 c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
7 d	If 'Yes,' indicate the number of Forms 8282 filed during the year		
7 e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
7 f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
7 g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
7 h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		X
9 Sponsoring organizations maintaining donor advised funds.			
9 a	Did the sponsoring organization make any taxable distributions under section 4966?		X
9 b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		X
10 Section 501(c)(7) organizations. Enter:			
10 a	Initiation fees and capital contributions included on Part VIII, line 12.		
10 b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		
11 Section 501(c)(12) organizations. Enter:			
11 a	Gross income from members or shareholders.		
11 b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)		
12 a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		
12 b	If 'Yes,' enter the amount of tax-exempt interest received or accrued during the year		
13 Section 501(c)(29) qualified nonprofit health insurance issuers.			
13 a	Is the organization licensed to issue qualified health plans in more than one state?		
Note. See the instructions for additional information the organization must report on Schedule O.			
13 b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans		
13 c	Enter the amount of reserves on hand		
14 a	Did the organization receive any payments for indoor tanning services during the tax year?		X
14 b	If 'Yes,' has it filed a Form 720 to report these payments? If 'No,' provide an explanation in Schedule O		

Part VI Governance, Management, and Disclosure For each 'Yes' response to lines 2 through 7b below, and for a 'No' response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI. [X]

Section A. Governing Body and Management

Table with 3 columns: Question, Yes, No. Rows include 1a (11), 1b (11), 2, 3, 4, 5, 6, 7a, 7b, 8a, 8b, 9.

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

Table with 3 columns: Question, Yes, No. Rows include 10a, 10b, 11a, 12a, 12b, 12c, 13, 14, 15a, 15b, 16a, 16b.

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed North Carolina
18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
20 State the name, address, and telephone number of the person who possesses the organization's books and records: Acadia Northstar Main Street Rutherfordton, NC 28139 (828) 287-7897

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1 a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of 'key employee.'
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) Domina Blount Dir	2.00	X								
(2) Malcolm Grant Dir	2.00	X								
(3) J Franklin Martin Chair	5.00	X		X						
(4) Vernon Sumter Dir	2.00	X								
(5) Herbert L Harriss Director	5.00	X								
(6) Donald Thompson Director	2.00	X								
(7) Richard L Bovard Sec./Treasurer	5.00	X		X						
(8) Scott A Stover Vice Chair	2.00	X		X						
(9) Tom Van Popering Director	2.00	X								
(10) Whitney Wertz Director	2.00	X								
(11) Charles East Director	2.00	X								
(12)										
(13)										
(14)										

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) -----										
(16) -----										
(17) -----										
(18) -----										
(19) -----										
(20) -----										
(21) -----										
(22) -----										
(23) -----										
(24) -----										
(25) -----										
1 b Sub-total										
c Total from continuation sheets to Part VII, Section A										
d Total (add lines 1b and 1c)										

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization ▶

	Yes	No
3 Did the organization list any former officer, director, or trustee, key employee, or highest compensated employee on line 1a? <i>If 'Yes,' complete Schedule J for such individual</i>		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If 'Yes' complete Schedule J for such individual</i>		X
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If 'Yes,' complete Schedule J for such person</i>		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization ▶

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514	
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1 a				
	b Membership dues	1 b				
	c Fundraising events	1 c				
	d Related organizations	1 d				
	e Government grants (contributions) . .	1 e 9,630,714.				
	f All other contributions, gifts, grants, and similar amounts not included above . .	1 f 475,402.				
	g Noncash contributions included in lines 1a-1f: \$					
	h Total. Add lines 1a-1f		10,106,116.			
Program Service Revenue	Business Code					
	2 a <u>Food Services</u>	900099	40,417.	40,417.	0.	0.
	b					
	c					
	d					
	e					
	f All other program service revenue . . .					
g Total. Add lines 2a-2f		40,417.				
Other Revenue	3 Investment income (including dividends, interest and other similar amounts)					
	4 Income from investment of tax-exempt bond proceeds . .					
	5 Royalties					
	6 a Gross rents	(i) Real				
		(ii) Personal				
		b Less: rental expenses				
		c Rental income or (loss) . .				
	d Net rental income or (loss)					
	7 a Gross amount from sales of assets other than inventory	(i) Securities				
		(ii) Other	0.			
		b Less: cost or other basis and sales expenses	426,758.			
		c Gain or (loss)	-426,758.			
	d Net gain or (loss)		-426,758.	0.	0.	-426,758.
	8 a Gross income from fundraising events (not including: . . \$ _____ of contributions reported on line 1c). See Part IV, line 18.	a				
		b Less: direct expenses	b			
c Net income or (loss) from fundraising events						
9 a Gross income from gaming activities. See Part IV, line 19.	a					
	b Less: direct expenses	b				
	c Net income or (loss) from gaming activities					
10 a Gross sales of inventory, less returns and allowances	a					
	b Less: cost of goods sold	b				
	c Net income or (loss) from sales of inventory					
Miscellaneous Revenue		Business Code				
11 a <u>School activities</u>	900099	26,473.	26,473.	0.	0.	
b <u>Int. Rate Swap Buyout</u>	900099	-115,969.	0.	0.	-115,969.	
c <u>Others</u>	900099	65,397.	65,397.	0.	0.	
d All other revenue						
e Total. Add lines 11a-11d		-24,099.				
12 Total revenue. See instructions		9,695,676.	132,287.	0.	-542,727.	

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees				
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	5,583,941.	5,149,157.	434,784.	0.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	75,077.	72,370.	2,707.	0.
9 Other employee benefits	386,820.	383,628.	3,192.	0.
10 Payroll taxes	472,986.	431,635.	41,351.	0.
11 Fees for services (non-employees):				
a Management				
b Legal	7,739.	0.	7,739.	0.
c Accounting	8,800.	0.	8,800.	0.
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amt exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)				
12 Advertising and promotion	29,316.	0.	29,316.	0.
13 Office expenses	170,998.	41,104.	129,894.	0.
14 Information technology	81,932.	81,932.	0.	0.
15 Royalties				
16 Occupancy	151,353.	14,230.	137,123.	0.
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	74,824.	74,824.	0.	0.
20 Interest	238,091.	0.	238,091.	0.
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	472,374.	122,831.	349,543.	0.
23 Insurance	10,811.	0.	10,811.	0.
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a <u>Contracted Services</u>	234,408.	141,520.	92,888.	0.
b <u>Supplies</u>	210,363.	164,074.	33,451.	12,838.
c <u>Other</u>	0.	0.	0.	0.
d <u>Food Service</u>	454,814.	454,814.	0.	0.
e All other expenses	634,954.	220,832.	414,122.	0.
25 Total functional expenses. Add lines 1 through 24e.	9,299,601.	7,352,951.	1,933,812.	12,838.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X

		(A) Beginning of year		(B) End of year
Assets	1 Cash — non-interest-bearing	315,052.	1	820,576.
	2 Savings and temporary cash investments		2	
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net	313,558.	4	358,444.
	5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	17,383.	9	30,879.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 13,475,681.		
	b Less: accumulated depreciation	10b 3,310,510.	8,809,938.	10c 10,165,171.
	11 Investments — publicly traded securities		11	
	12 Investments — other securities. See Part IV, line 11		12	
	13 Investments — program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11		15	
16 Total assets. Add lines 1 through 15 (must equal line 34)		9,455,931.	16	11,375,070.
Liabilities	17 Accounts payable and accrued expenses.	297,058.	17	25,945.
	18 Grants payable.		18	
	19 Deferred revenue	78,875.	19	30,000.
	20 Tax-exempt bond liabilities	4,674,996.	20	0.
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23 Secured mortgages and notes payable to unrelated third parties	1,915,864.	23	8,433,912.
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D		25	
	26 Total liabilities. Add lines 17 through 25.		6,966,793.	26
Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.			
	27 Unrestricted net assets.	270,060.	27	1,153,954.
	28 Temporarily restricted net assets	2,219,078.	28	1,731,259.
	29 Permanently restricted net assets		29	
	Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.			
	30 Capital stock or trust principal, or current funds		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds		32	
	33 Total net assets or fund balances.		2,489,138.	33
34 Total liabilities and net assets/fund balances		9,455,931.	34	11,375,070.

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI.

1	Total revenue (must equal Part VIII, column (A), line 12)	1	9,695,676.
2	Total expenses (must equal Part IX, column (A), line 25)	2	9,299,601.
3	Revenue less expenses. Subtract line 2 from line 1	3	396,075.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	2,489,138.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	2,885,213.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

		Yes	No
1	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked 'Other,' explain in Schedule O.		
2 a	Were the organization's financial statements compiled or reviewed by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		X
2 b	Were the organization's financial statements audited by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	X	
2 c	If 'Yes' to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.		X
3 a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	X	
3 b	If 'Yes,' did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits	X	

BAA

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
 ▶ Attach to Form 990 or Form 990-EZ.
 ▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2014

Open to Public Inspection

Name of the organization Sugar Creek Charter School	Employer identification number 56-2077708
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Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1 A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: _____
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 An organization that normally receives: (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions — subject to certain exceptions, and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box in lines 11a through 11d that describes the type of supporting organization and complete lines 11e, 11f, and 11g.
 - a **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
 - b **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
 - c **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
 - d **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
 - e Check this box if the organization received a written determination from the IRS that is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
 - f Enter the number of supported organizations
 - g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
Total						

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any 'unusual grants.')						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge.						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ▶ <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2014 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2013 Schedule A, Part II, line 14	15	%
16a 33-1/3% support test — 2014. If the organization did not check the box on line 13, and the line 14 is 33-1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
b 33-1/3% support test — 2013. If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
17a 10%-facts-and-circumstances test — 2014. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and stop here. Explain in Part VI how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
b 10%-facts-and-circumstances test — 2013. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and stop here. Explain in Part VI how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ <input type="checkbox"/>		

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal yr beginning in) ▶	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
1 Gifts, grants, contributions and membership fees received. (Do not include any 'unusual grants').						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge.						
6 Total. Add lines 1 through 5						
7 a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal yr beginning in) ▶	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
9 Amounts from line 6						
10 a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11 and 12.)						

14 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ▶

Section C. Computation of Public Support Percentage

15 Public support percentage for 2014 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2013 Schedule A, Part III, line 15.	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2014 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2013 Schedule A, Part III, line 17	18	%

19 a **33-1/3% support tests — 2014.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ▶

b **33-1/3% support tests — 2013.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ▶

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions. ▶

Part IV Supporting Organizations

(Complete only if you checked a box on line 11 of Part I. If you checked 11a of Part I, complete Sections A and B. If you checked 11b of Part I, complete Sections A and C. If you checked 11c of Part I, complete Sections A, D, and E. If you checked 11d of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If 'No,' describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If 'Yes,' explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2)		
3 a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If 'Yes,' answer (b) and (c) below.		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If 'Yes,' describe in Part VI when and how the organization made the determination		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If 'Yes,' explain in Part VI what controls the organization put in place to ensure such use		
4 a Was any supported organization not organized in the United States ('foreign supported organization')? If 'Yes' and if you checked 11a or 11b in Part I, answer (b) and (c) below		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If 'Yes,' describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If 'Yes,' explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes		
5 a Did the organization add, substitute, or remove any supported organizations during the tax year? If 'Yes,' answer (b) and (c) below (if applicable). Also, provide detail in Part VI , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document)		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (a) its supported organizations; (b) individuals that are part of the charitable class benefited by one or more of its supported organizations; or (c) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If 'Yes,' provide detail in Part VI		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in IRC 4958(c)(3)(C)), a family member of a substantial contributor, or a 35-percent controlled entity with regard to a substantial contributor? If 'Yes,' complete Part I of Schedule L (Form 990)		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If 'Yes,' complete Part I of Schedule L (Form 990).		
9 a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If 'Yes,' provide detail in Part VI		
b Did one or more disqualified persons (as defined in line 9(a)) hold a controlling interest in any entity in which the supporting organization had an interest? If 'Yes,' provide detail in Part VI		
c Did a disqualified person (as defined in line 9(a)) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If 'Yes,' provide detail in Part VI		
10 a Was the organization subject to the excess business holdings rules of IRC 4943 because of IRC 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If 'Yes,' answer (b) below		
b Did the organization, have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?	11a	
b A family member of a person described in (a) above?	11b	
c A 35% controlled entity of a person described in (a) or (b) above? <i>If 'Yes' to a, b, or c, provide detail in Part VI</i>	11c	

Section B. Type I Supporting Organizations

	Yes	No
1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? <i>If 'No,' describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year</i>	1	
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If 'Yes,' explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.</i>	2	

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If 'No,' describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s)</i>	1	

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (1) a written notice describing the type and amount of support provided during the prior tax year, (2) a copy of the Form 990 that was most recently filed as of the date of notification, and (3) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	1	
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? <i>If 'No,' explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>	2	
3 By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If 'Yes,' describe in Part VI the role the organization's supported organizations played in this regard</i>	3	

Section E. Type III Functionally-Integrated Supporting Organizations

- Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions):
 - The organization satisfied the Activities Test. Complete line 2 below.
 - The organization is the parent of each of its supported organizations. Complete line 3 below.
 - The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).

2 Activities Test. Answer (a) and (b) below.

- Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? *If 'Yes,' then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities*
- Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? *If 'Yes,' explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement*

	Yes	No
2a		
2b		
3a		
3b		

3 Parent of Supported Organizations. Answer (a) and (b) below.

- Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? *Provide details in Part VI.*
- Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? *If 'Yes,' describe in Part VI the role played by the organization in this regard*

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 Check here if the organization satisfied the Integral Part Test as a qualifying trust on November 20, 1970. See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A – Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions).	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6 and 7 from line 4)	8	

Section B – Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1 a	
b	Average monthly cash balances	1 b	
c	Fair market value of other non-exempt-use assets	1 c	
d	Total (add lines 1a, 1b, and 1c).	1 d	
e	Discount claimed for blockage or other factors (explain in detail in Part VI):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by .035.	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C – Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	

7 Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions).

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Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations *(continued)*

Section D – Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required).	
6 Other distributions (describe in Part VI). See instructions	
7 Total annual distributions. Add lines 1 through 6	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	
9 Distributable amount for 2014 from Section C, line 6	
10 Line 8 amount divided by Line 9 amount	

Section E – Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2014	(iii) Distributable Amount for 2014
1 Distributable amount for 2014 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2014 (reasonable cause required – see instructions)			
3 Excess distributions carryover, if any, to 2014:			
a			
b			
c			
d			
e From 2013			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2014 distributable amount			
i Carryover from 2009 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f			
4 Distributions for 2014 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2014 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4			
5 Remaining underdistributions for years prior to 2014, if any. Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions)			
6 Remaining underdistributions for 2014. Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions)			
7 Excess distributions carryover to 2015. Add lines 3j and 4c			
8 Breakdown of line 7:			
a			
b			
c			
d Excess from 2013			
e Excess from 2014			

BAA

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

**SCHEDULE D
(Form 990)**

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ Complete if the organization answered 'Yes,' to Form 990, Part IV, lines 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
▶ Attach to Form 990.

▶ Information about Schedule D (Form 990) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2014

Open to Public Inspection

Name of the organization

Sugar Creek Charter School

Employer identification number

56-2077708

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Part II Conservation Easements.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (e.g., recreation or education)	<input type="checkbox"/> Preservation of a historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements	2 a
b Total acreage restricted by conservation easements	2 b
c Number of conservation easements on a certified historic structure included in (a)	2 c
d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register	2 d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ _____

4 Number of states where property subject to conservation easement is located ▶ _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? Yes No

6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ▶ _____

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ \$ _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? Yes No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 8.

1 a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included in Form 990, Part VIII, line 1 ▶ \$ _____

(ii) Assets included in Form 990, Part X ▶ \$ _____

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:

a Revenue included in Form 990, Part VIII, line 1 ▶ \$ _____

b Assets included in Form 990, Part X ▶ \$ _____

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

- 3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):
- a Public exhibition
 - b Scholarly research
 - c Preservation for future generations
 - d Loan or exchange programs
 - e Other _____
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? Yes No

Part IV Escrow and Custodial Arrangements. Complete if the organization answered 'Yes' to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1 a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? Yes No
- b If 'Yes,' explain the arrangement in Part XIII and complete the following table:
- | | Amount |
|-----------------------------------|--------|
| 1 c Beginning balance | |
| 1 d Additions during the year | |
| 1 e Distributions during the year | |
| 1 f Ending balance | |
- 2 a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? Yes No
- b If 'Yes,' explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII. Yes No

Part V Endowment Funds. Complete if the organization answered 'Yes' to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1 a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

- a Board designated or quasi-endowment _____ %
- b Permanent endowment _____ %
- c Temporarily restricted endowment _____ %

The percentages in lines 2a, 2b, and 2c should equal 100%.

3 a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

	Yes	No
(i) unrelated organizations	3a(i)	
(ii) related organizations	3a(ii)	
b If 'Yes' to 3a(ii), are the related organizations listed as required on Schedule R?	3b	

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1 a Land		3,262,499.		3,262,499.
b Buildings		8,128,226.	1,837,915.	6,290,311.
c Leasehold improvements				
d Equipment		2,084,956.	1,472,595.	612,361.
e Other				
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				10,165,171.

Part VII Investments – Other Securities.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other _____		
(A) _____		
(B) _____		
(C) _____		
(D) _____		
(E) _____		
(F) _____		
(G) _____		
(H) _____		
(I) _____		
Total. (Column (b) must equal Form 990, Part X, column (B) line 12.) . . . ▶		

Part VIII Investments – Program Related.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment type	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
Total. (Column (b) must equal Form 990, Part X, column (B) line 13.) . . . ▶		

Part IX Other Assets.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
Total. (Column (b) must equal Form 990, Part X, column (B), line 15.) ▶	

Part X Other Liabilities.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25

(a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
(11)	
Total. (Column (b) must equal Form 990, Part X, column (B) line 25.) . . . ▶	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements		1	9,695,676.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
	a Net unrealized gains (losses) on investments	2 a		
	b Donated services and use of facilities	2 b		
	c Recoveries of prior year grants	2 c		
	d Other (Describe in Part XIII.)	2 d		
	e Add lines 2a through 2d		2 e	
3	Subtract line 2e from line 1		3	9,695,676.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
	a Investment expenses not included on Form 990, Part VIII, line 7b.	4 a		
	b Other (Describe in Part XIII.)	4 b		
	c Add lines 4a and 4b		4 c	
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)		5	9,695,676.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements.		1	9,299,601.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
	a Donated services and use of facilities	2 a		
	b Prior year adjustments	2 b		
	c Other losses	2 c		
	d Other (Describe in Part XIII.)	2 d		
	e Add lines 2a through 2d		2 e	
3	Subtract line 2e from line 1		3	9,299,601.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
	a Investment expenses not included on Form 990, Part VIII, line 7b.	4 a		
	b Other (Describe in Part XIII.)	4 b		
	c Add lines 4a and 4b		4 c	
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)		5	9,299,601.

Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

SCHEDULE E
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Schools

▶ Complete if the organization answered 'Yes' to Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.
▶ Attach to Form 990 or Form 990-EZ.

▶ Information about Schedule E (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2014

Open to Public Inspection

Name of the organization

Sugar Creek Charter School

Employer identification number

56-2077708

Part I

	YES	NO
1 Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?	X	
2 Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?	X	
3 Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If 'Yes,' please describe. If 'No,' please explain. If you need more space, use Part II	X	
<u>Included in all advertisements, brochures and school applications.</u>		
4 Does the organization maintain the following?		
a Records indicating the racial composition of the student body, faculty, and administrative staff?	X	
b Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?	X	
c Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	X	
d Copies of all material used by the organization or on its behalf to solicit contributions?	X	
If you answered 'No' to any of the above, please explain. If you need more space, use Part II.		
5 Does the organization discriminate by race in any way with respect to:		
a Students' rights or privileges?		X
b Admissions policies?		X
c Employment of faculty or administrative staff?		X
d Scholarships or other financial assistance?		X
e Educational policies?		X
f Use of facilities?		X
g Athletic programs?		X
h Other extracurricular activities?		X
If you answered 'Yes' to any of the above, please explain. If you need more space, use Part II.		
6 a Does the organization receive any financial aid or assistance from a governmental agency?	X	
b Has the organization's right to such aid ever been revoked or suspended?		X
If you answered 'Yes' to either line 6a or line 6b, explain on Part II.		
7 Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If 'No,' explain on Part II	X	

Part II **Supplemental Information.** Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable. Also provide any other additional information (see instructions).

Line 3 N/A
Line 6b N/A

SCHEDULE O
(Form 990 or 990-EZ)

Supplemental Information to Form 990 or 990-EZ

OMB No. 1545-0047

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.
▶ Attach to Form 990 or 990-EZ.

2014

Department of the Treasury
Internal Revenue Service

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is
at www.irs.gov/form990.

Open to Public
Inspection

Name of the organization

Employer identification number

Sugar Creek Charter School

56-2077708

Pt VI, Line 11b Board reviews 990 prior to filing.
Pt VI, Line 12c Conflict of Interest statement signed annually.
Pt VI, Line 15a Compared to other charter schools.
Pt VI, Line 15b Compared to other charter schools.

**IRS e-file Signature Authorization
for an Exempt Organization**

For calendar year 2014, or fiscal year beginning Jul 1, 2014, and ending Jun 30, 2015.

▶ Do not send to the IRS. Keep for your records.

▶ Information about Form 8879-EO and its instructions is at www.irs.gov/form8879eo.

2014

Department of the Treasury
Internal Revenue Service

Name of exempt organization

Sugar Creek Charter School

Employer identification number

56-2077708

Name and title of officer

J Franklin Martin

Chair

Part I Type of Return and Return Information (Whole Dollars Only)

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line 1a, 2a, 3a, 4a, or 5a, below, and the amount on that line for the return being filed with this form was blank, then leave line 1b, 2b, 3b, 4b, or 5b, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. Do not complete more than 1 line in Part I.

1 a Form 990 check here . . . ▶ <input checked="" type="checkbox"/>	b Total revenue, if any (Form 990, Part VIII, column (A), line 12)	1 b	9,695,676.
2 a Form 990-EZ check here . . . ▶ <input type="checkbox"/>	b Total revenue, if any (Form 990-EZ, line 9)	2 b	
3 a Form 1120-POL check here . . . ▶ <input type="checkbox"/>	b Total tax (Form 1120-POL, line 22)	3 b	
4 a Form 990-PF check here . . . ▶ <input type="checkbox"/>	b Tax based on investment income (Form 990-PF, Part VI, line 5)	4 b	
5 a Form 8868 check here . . . ▶ <input type="checkbox"/>	b Balance Due (Form 8868, Part I, line 3c or Part II, line 8c)	5 b	

Part II Declaration and Signature Authorization of Officer

Under penalties of perjury, I declare that I am an officer of the above organization and that I have examined a copy of the organization's 2014 electronic return and accompanying schedules and statements and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the organization's electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the organization's return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the organization's federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the organization's electronic return and, if applicable, the organization's consent to electronic funds withdrawal.

Officer's PIN: check one box only

I authorize Darrell L. Keller to enter my PIN 12345 as my signature
ERO firm name Enter five numbers, but do not enter all zeros

on the organization's tax year 2014 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

As an officer of the organization, I will enter my PIN as my signature on the organization's tax year 2014 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Officer's signature ▶ _____ Date ▶ 02/11/2016

Part III Certification and Authentication

ERO's EFIN/PIN. Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN 69202033401
do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2014 electronically filed return for the organization indicated above. I confirm that I am submitting this return in accordance with the requirements of Pub 4163, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature ▶ _____ Date ▶ 02/10/2016

**ERO Must Retain This Form – See Instructions
Do Not Submit This Form To the IRS Unless Requested To Do So**

**IRS e-file Signature Authorization
for an Exempt Organization**

For calendar year 2014, or fiscal year beginning Jul 1, 2014, and ending Jun 30, 2015.

▶ Do not send to the IRS. Keep for your records.

▶ Information about Form 8879-EO and its instructions is at www.irs.gov/form8879eo.

2014

Department of the Treasury
Internal Revenue Service

Name of exempt organization

Sugar Creek Charter School

Name and title of officer

J Franklin Martin

Chair

Employer identification number

56-2077708

Part I Type of Return and Return Information (Whole Dollars Only)

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line 1a, 2a, 3a, 4a, or 5a, below, and the amount on that line for the return being filed with this form was blank, then leave line 1b, 2b, 3b, 4b, or 5b, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. Do not complete more than 1 line in Part I.

- 1 a Form 990 check here . . . ▶ b Total revenue, if any (Form 990, Part VIII, column (A), line 12) 1 b 9,695,676.
- 2 a Form 990-EZ check here . . . ▶ b Total revenue, if any (Form 990-EZ, line 9) 2 b _____
- 3 a Form 1120-POL check here . . . ▶ b Total tax (Form 1120-POL, line 22) 3 b _____
- 4 a Form 990-PF check here . . . ▶ b Tax based on investment income (Form 990-PF, Part VI, line 5) 4 b _____
- 5 a Form 8868 check here . . . ▶ b Balance Due (Form 8868, Part I, line 3c or Part II, line 8c) 5 b _____

Part II Declaration and Signature Authorization of Officer

Under penalties of perjury, I declare that I am an officer of the above organization and that I have examined a copy of the organization's 2014 electronic return and accompanying schedules and statements and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the organization's electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the organization's return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the organization's federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the organization's electronic return and, if applicable, the organization's consent to electronic funds withdrawal.

Officer's PIN: check one box only

I authorize Darrell L. Keller to enter my PIN 12345 as my signature
ERO firm name Enter five numbers, but do not enter all zeros

on the organization's tax year 2014 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

As an officer of the organization, I will enter my PIN as my signature on the organization's tax year 2014 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Officer's signature ▶ J Franklin Martin, Board Chair Date ▶ 02/11/2016

Part III Certification and Authentication

ERO's EFIN/PIN. Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN 69202033401
do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2014 electronically filed return for the organization indicated above. I confirm that I am submitting this return in accordance with the requirements of Pub 4163, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature ▶ Sheryl D Turner Date ▶ 02/10/2016

**ERO Must Retain This Form – See Instructions
Do Not Submit This Form To the IRS Unless Requested To Do So**

2015 Exempt Organization Business Tax Return

prepared by:

Darrell L. Keller, CPA, PA

P.O. Box 1028

Kings Mountain, NC 28086

Sugar Creek Charter School

4101 N Tryon Street

Charlotte, NC 28206

Return of Organization Exempt From Income Tax
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)
Do not enter social security numbers on this form as it may be made public.
Information about Form 990 and its instructions is at www.irs.gov/form990.

2015

Open to Public Inspection

Department of the Treasury Internal Revenue Service

A For the 2015 calendar year, or tax year beginning Jul 1, 2015, and ending Jun 30, 2016

B Check if applicable: Address change, Name change, Initial return, Final return/terminated, Amended return, Application pending. C Name of organization: Sugar Creek Charter School. D Employer identification number: 56-2077708. E Telephone number: (704) 509-5470. F Name and address of principal officer: J Franklin Martin 4101 N Tryon Charlotte NC 28206. G Gross receipts: \$12,633,493. H(a) Is this a group return for subordinates? Yes No. H(b) Are all subordinates included? Yes No. I Tax-exempt status: 501(c)(3). J Website: N/A. K Form of organization: Corporation. L Year of formation: 1997. M State of legal domicile: NC.

Part I Summary

Table with 4 columns: Line number, Description, Prior Year, Current Year. Rows include: 1. Briefly describe the organization's mission or most significant activities: Operate a public charter school. 2-7. Governance and membership statistics. 8-12. Revenue breakdown. 13-19. Expenses breakdown. 20-22. Net assets or fund balances.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here: Signature of officer: J Franklin Martin, Date: 01/25/17, Title: Chair.

Paid Preparer Use Only: Print/Type preparer's name: Darrell L. Keller, Preparer's signature: Darrell L. Keller, Date: 01/25/17, PTIN: P00153428, Firm's name: Darrell L. Keller, CPA, PA, Firm's address: P.O. Box 1028, Kings Mountain NC 28086, Firm's EIN: 51-0471443, Phone no.: (704) 739-0771.

May the IRS discuss this return with the preparer shown above? (see instructions) Yes No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III []

1 Briefly describe the organization's mission:

Operate a public charter school.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [] Yes [X] No

If 'Yes,' describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [] Yes [X] No

If 'Yes,' describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4 a (Code:) (Expenses \$ 8,569,403. including grants of \$ 0.) (Revenue \$ 12,633,493.)

Operation of a charter school in Charlotte, North Carolina.

4 b (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4 c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4 d Other program services. (Describe in Schedule O.)

(Expenses \$ including grants of \$) (Revenue \$)

4 e Total program service expenses 8,569,403.

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If 'Yes,' complete Schedule A.</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> (see instructions)?		X
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If 'Yes,' complete Schedule C, Part I.</i>		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If 'Yes,' complete Schedule C, Part II.</i>		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If 'Yes,' complete Schedule C, Part III.</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If 'Yes,' complete Schedule D, Part I.</i>		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If 'Yes,' complete Schedule D, Part II.</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If 'Yes,' complete Schedule D, Part III.</i>		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If 'Yes,' complete Schedule D, Part IV.</i>		X
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If 'Yes,' complete Schedule D, Part V.</i>		X
11 If the organization's answer to any of the following questions is 'Yes,' then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings and equipment in Part X, line 10? <i>If 'Yes,' complete Schedule D, Part VI.</i>	X	
b Did the organization report an amount for investments — other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If 'Yes,' complete Schedule D, Part VII.</i>		X
c Did the organization report an amount for investments — program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If 'Yes,' complete Schedule D, Part VIII.</i>		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If 'Yes,' complete Schedule D, Part IX.</i>		X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If 'Yes,' complete Schedule D, Part X.</i>		X
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If 'Yes,' complete Schedule D, Part X.</i>		X
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If 'Yes,' complete Schedule D, Parts XI, and XII.</i>	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If 'Yes,' and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI and XII is optional.</i>		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If 'Yes,' complete Schedule E.</i>	X	
14a Did the organization maintain an office, employees, or agents outside of the United States?.		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If 'Yes,' complete Schedule F, Parts I and IV.</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If 'Yes,' complete Schedule F, Parts II and IV.</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If 'Yes,' complete Schedule F, Parts III and IV.</i>		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If 'Yes,' complete Schedule G, Part I (see instructions).</i>		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If 'Yes,' complete Schedule G, Part II.</i>		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If 'Yes,' complete Schedule G, Part III.</i>		X

Part IV Checklist of Required Schedules (continued)

	Yes	No
20a Did the organization operate one or more hospital facilities? <i>If 'Yes,' complete Schedule H</i>		X
b If 'Yes' to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If 'Yes,' complete Schedule I, Parts I and II</i>		X
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If 'Yes,' complete Schedule I, Parts I and III</i>		X
23 Did the organization answer 'Yes' to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If 'Yes,' complete Schedule J</i>		X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If 'Yes,' answer lines 24b through 24d and complete Schedule K. If 'No,' go to line 25a</i>		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If 'Yes,' complete Schedule L, Part I</i>		X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If 'Yes,' complete Schedule L, Part I</i>		X
26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If 'Yes,' complete Schedule L, Part II</i>		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If 'Yes,' complete Schedule L, Part III</i>		X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
b A family member of a current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If 'Yes,' complete Schedule M</i>		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If 'Yes,' complete Schedule M</i>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If 'Yes,' complete Schedule N, Part I</i>		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If 'Yes,' complete Schedule N, Part II</i>		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If 'Yes,' complete Schedule R, Part I</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If 'Yes,' complete Schedule R, Part II, III, or IV, and Part V, line 1</i>		X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
b If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>		X
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If 'Yes,' complete Schedule R, Part VI</i>		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O	X	

BAA

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V

Table with columns for line numbers (1a-14b), descriptions of questions, and Yes/No columns. Includes sections for backup withholding, employee reporting, foreign accounts, prohibited transactions, charitable contributions, and sponsoring organizations.

Part VI Governance, Management, and Disclosure For each 'Yes' response to lines 2 through 7b below, and for a 'No' response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI. X

Section A. Governing Body and Management

		Yes	No
1 a	Enter the number of voting members of the governing body at the end of the tax year 1 a 12 If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.		
b	Enter the number of voting members included in line 1a, above, who are independent 1 b 10		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person?		X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		X
6	Did the organization have members or stockholders?		X
7 a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?		X
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a	The governing body?	X	
b	Each committee with authority to act on behalf of the governing body?	X	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If 'Yes,' provide the names and addresses in Schedule O		X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
10 a	Did the organization have local chapters, branches, or affiliates?		X
b	If 'Yes,' did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?		
11 a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	X	
b	Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
12 a	Did the organization have a written conflict of interest policy? If 'No,' go to line 13	X	
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If 'Yes,' describe in Schedule O how this was done	X	
13	Did the organization have a written whistleblower policy?	X	
14	Did the organization have a written document retention and destruction policy?	X	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a	The organization's CEO, Executive Director, or top management official	X	
b	Other officers or key employees of the organization If 'Yes' to line 15a or 15b, describe the process in Schedule O (see instructions).	X	
16 a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
b	If 'Yes,' did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?		

Section C. Disclosure

- 17** List the states with which a copy of this Form 990 is required to be filed ▶ North Carolina
- 18** Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
 Own website Another's website Upon request Other (explain in Schedule O)
- 19** Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records: ▶
Acadia Northstar Main Street Rutherfordton, NC 28139 (828) 287-7897

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1 a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of 'key employee.'
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)					(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee			
(1) <u>Domina Blount</u> Dir Ex Officio	2.00	X			X		85,660.	0.	0.
(2) <u>Malcolm Grant</u> Dir	2.00	X					0.	0.	0.
(3) <u>J Franklin Martin</u> Chair	5.00	X		X			0.	0.	0.
(4) <u>Vernon Sumter</u> Dir	2.00	X					0.	0.	0.
(5) <u>Herbert L Harriss</u> Director	5.00	X					0.	0.	0.
(6) <u>Donald Thompson</u> Director	2.00	X					0.	0.	0.
(7) <u>Richard L Bovard</u> Treasurer	5.00	X		X			0.	0.	0.
(8) <u>Scott A Stover</u> Vice Chair	2.00	X		X			0.	0.	0.
(9) <u>Tom Van Popering</u> Director	2.00	X					0.	0.	0.
(10) <u>Whitni Wertz</u> Director	2.00	X					0.	0.	0.
(11) <u>Charles East</u> Secretary	2.00	X		X			0.	0.	0.
(12) <u>Cheryl Turner</u> Dir Ex Officio	2.00	X			X		134,518.	0.	0.
(13) _____	---								
(14) _____	---								

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) -----										
(16) -----										
(17) -----										
(18) -----										
(19) -----										
(20) -----										
(21) -----										
(22) -----										
(23) -----										
(24) -----										
(25) -----										
1 b Sub-total							220,178.	0.	0.	
c Total from continuation sheets to Part VII, Section A										
d Total (add lines 1b and 1c)							220,178.	0.	0.	

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **1**

	Yes	No
3 Did the organization list any former officer, director, or trustee, key employee, or highest compensated employee on line 1a? <i>If 'Yes,' complete Schedule J for such individual</i>	3	X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If 'Yes' complete Schedule J for such individual</i>	4	X
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If 'Yes,' complete Schedule J for such person</i>	5	X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1 a				
	b Membership dues	1 b				
	c Fundraising events	1 c				
	d Related organizations	1 d				
	e Government grants (contributions) . .	1 e	11,057,200.			
	f All other contributions, gifts, grants, and similar amounts not included above . .	1 f	1,414,511.			
	g Noncash contributions included in lines 1a-1f: \$					
h Total. Add lines 1a-1f			12,471,711.			
Program Service Revenue	2 a <u>Food Services</u>	Business Code 900099	1,002.	1,002.	0.	0.
	b					
	c					
	d					
	e					
	f All other program service revenue . . .					
	g Total. Add lines 2a-2f			1,002.		
Other Revenue	3 Investment income (including dividends, interest and other similar amounts)					
	4 Income from investment of tax-exempt bond proceeds . .					
	5 Royalties					
	6 a Gross rents	(i) Real				
		(ii) Personal				
		b Less: rental expenses				
		c Rental income or (loss) . .				
	d Net rental income or (loss)					
	7 a Gross amount from sales of assets other than inventory	(i) Securities				
		(ii) Other				
		b Less: cost or other basis and sales expenses . . .				
		c Gain or (loss)				
	d Net gain or (loss)					
	8 a Gross income from fundraising events (not including . . \$ _____ of contributions reported on line 1c). See Part IV, line 18.	a				
		b Less: direct expenses	b			
c Net income or (loss) from fundraising events						
9 a Gross income from gaming activities. See Part IV, line 19.	a					
	b Less: direct expenses	b				
	c Net income or (loss) from gaming activities					
10 a Gross sales of inventory, less returns and allowances	a					
	b Less: cost of goods sold	b				
	c Net income or (loss) from sales of inventory					
Miscellaneous Revenue		Business Code				
11 a <u>School activities</u>	900099	0.	0.	0.	0.	
b <u>Int. Rate Swap Buyout</u>	900099	0.	0.	0.	0.	
c <u>Others</u>	900099	160,780.	160,780.	0.	0.	
d All other revenue						
e Total. Add lines 11a-11d			160,780.			
12 Total revenue. See instructions			12,633,493.	161,782.	0.	0.

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	220,178.	220,178.	0.	0.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	6,806,648.	5,991,394.	815,254.	0.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	82,053.	78,116.	3,937.	0.
9 Other employee benefits	437,509.	417,225.	20,284.	0.
10 Payroll taxes	589,932.	516,376.	73,556.	0.
11 Fees for services (non-employees):				
a Management				
b Legal	64,990.	0.	64,990.	0.
c Accounting	8,800.	0.	8,800.	0.
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)				
12 Advertising and promotion	27,789.	0.	27,789.	0.
13 Office expenses	128,295.	70,050.	58,245.	0.
14 Information technology	161,182.	161,182.	0.	0.
15 Royalties				
16 Occupancy	184,097.	0.	184,097.	0.
17 Travel	99.	99.	0.	0.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	159,146.	159,146.	0.	0.
20 Interest	545,601.	0.	545,601.	0.
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	550,566.	71,553.	479,013.	0.
23 Insurance	125,075.	43,617.	81,458.	0.
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a <u>Contracted Services</u>	575,145.	71,916.	503,229.	0.
b <u>Supplies</u>	406,448.	242,225.	135,266.	28,957.
c <u>Other</u>	1,501.	0.	1,501.	0.
d <u>Food Service</u>	470,064.	0.	470,064.	0.
e All other expenses	715,431.	526,326.	189,105.	0.
25 Total functional expenses. Add lines 1 through 24e.	12,260,549.	8,569,403.	3,662,189.	28,957.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X

		(A) Beginning of year		(B) End of year	
Assets	1	Cash — non-interest-bearing	820,576.	1	973,032.
	2	Savings and temporary cash investments		2	
	3	Pledges and grants receivable, net		3	
	4	Accounts receivable, net	358,444.	4	724,769.
	5	Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L		6	
	7	Notes and loans receivable, net		7	
	8	Inventories for sale or use		8	
	9	Prepaid expenses and deferred charges	30,879.	9	7,383.
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 16,451,667.		
	10b	Less: accumulated depreciation	10b 3,604,343.		
			10,165,171.	10c	12,847,324.
	11	Investments — publicly traded securities		11	
	12	Investments — other securities. See Part IV, line 11		12	
	13	Investments — program-related. See Part IV, line 11		13	
	14	Intangible assets		14	
15	Other assets. See Part IV, line 11		15		
16	Total assets. Add lines 1 through 15 (must equal line 34)	11,375,070.	16	14,552,508.	
Liabilities	17	Accounts payable and accrued expenses	25,945.	17	50,273.
	18	Grants payable		18	
	19	Deferred revenue	30,000.	19	
	20	Tax-exempt bond liabilities	0.	20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22	Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23	Secured mortgages and notes payable to unrelated third parties	8,433,912.	23	11,244,078.
	24	Unsecured notes and loans payable to unrelated third parties		24	
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D		25	
	26	Total liabilities. Add lines 17 through 25	8,489,857.	26	11,294,351.
Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.				
	27	Unrestricted net assets	1,153,954.	27	1,654,910.
	28	Temporarily restricted net assets	1,731,259.	28	1,603,247.
	29	Permanently restricted net assets		29	
	Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.				
	30	Capital stock or trust principal, or current funds		30	
	31	Paid-in or capital surplus, or land, building, or equipment fund		31	
	32	Retained earnings, endowment, accumulated income, or other funds		32	
	33	Total net assets or fund balances	2,885,213.	33	3,258,157.
	34	Total liabilities and net assets/fund balances	11,375,070.	34	14,552,508.

BAA

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI

1	Total revenue (must equal Part VIII, column (A), line 12)	1	12,633,493.
2	Total expenses (must equal Part IX, column (A), line 25)	2	12,260,549.
3	Revenue less expenses. Subtract line 2 from line 1	3	372,944.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	2,885,213.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	3,258,157.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

		Yes	No
1	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked 'Other,' explain in Schedule O.		
2 a	Were the organization's financial statements compiled or reviewed by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		X
2 b	Were the organization's financial statements audited by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	X	
2 c	If 'Yes' to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.		X
3 a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	X	
3 b	If 'Yes,' did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits	X	

BAA

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ.

▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2015

Open to Public Inspection

Name of the organization Sugar Creek Charter School	Employer identification number 56-2077708
--	--

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1 A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990 or 990-EZ).)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: _____
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 An organization that normally receives: (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions — subject to certain exceptions, and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box in lines 11a through 11d that describes the type of supporting organization and complete lines 11e, 11f, and 11g.
 - a **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
 - b **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
 - c **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
 - d **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
 - e Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
 - f Enter the number of supported organizations
 - g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
Total						

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any 'unusual grants.')						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge.						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions).					12	

13 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

Section C. Computation of Public Support Percentage

14 Public support percentage for 2015 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2014 Schedule A, Part II, line 14	15	%

16a **33-1/3% support test – 2015.** If the organization did not check the box on line 13, and line 14 is 33-1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization

b **33-1/3% support test – 2014.** If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization

17a **10%-facts-and-circumstances test – 2015.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and **stop here.** Explain in Part VI how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization

b **10%-facts-and-circumstances test – 2014.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and **stop here.** Explain in Part VI how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
1 Gifts, grants, contributions and membership fees received. (Do not include any 'unusual grants.')						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						
14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ▶ <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

15 Public support percentage for 2015 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2014 Schedule A, Part III, line 15.	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2015 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2014 Schedule A, Part III, line 17	18	%

- 19a **33-1/3% support tests — 2015.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ▶
- b **33-1/3% support tests — 2014.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ▶
- 20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions. ▶

Appendix V:

Charter School Required Signature Certification

Note: Outlined below is a list of areas that must be certified by the proposed Board of Directors. Any forms Not Applicable to the proposed charter school indicate below with N/A and provide a brief explanation for providing such response.

Serving on a public charter school board is a position of public trust and board members of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, the school's fulfillment of its public obligations, all terms of its charter, and understanding/overseeing all third party contracts with individuals or companies.

❖ The selected Board Attorney that he/she has reviewed with the full Board of Directors, listed within the application, all the governance documents and liabilities associated with being on the Board of a Non Profit Corporation.

- Name of the Selected Board Attorney: Scott Green / Richard Vinroot
- Date of Review: 2015
- Signature of Board Members Present (Add Signature Lines as Needed):

- _____
■ _____
■ _____
- Scott Green
■ Richard Vinroot
■ _____
- _____
■ _____

❖ The selected Board Auditor that he/she has reviewed with the full Board of Directors, listed within the application, all the items required for the annual audit and 990 preparations.

- Name of the Selected Board Auditor: Darrell Keller, CPA
- Date of Review: 2015
- Signature of Board Members Present (Add Signature Lines as Needed):

■ _____
■ _____
- _____
■ _____
■ _____
- Darrell Keller, CPA
■ Scott Green
■ Richard Vinroot

❖ If contracting with a CMO/EMO, that the selected management company has reviewed with the full Board of Directors, listed within the application, all the items required and the associated management contract and operations.

- Name of the Contact for Selected EMO/CMO: N/A not an EMO/CMO
- Date of Review: _____
- Signature of Board Members Present (Add Signature Lines as Needed):

❖ If contracting with a financial management service provider that the selected financial service provider has reviewed with the full Board of Directors, listed within the application, all the financial processes and services provided.

- Name of the Contact: Robin Mallette
- Name of the Selected Financial Service Provider: Acadio Northstar
- Date of Review: 2015
- Signature of Board Members Present (Add Signature Lines as Needed):

❖ If the proposed Board of Directors, listed within the application, is contracting with a service provider to operate PowerSchool that the service provider has reviewed all of the financial processes and services provided.

- Name of the Contact: N/A in-house through Office Manager
- Name of the Selected PowerSchool Service Provider: _____
- Date of Review: _____
- Signature of Board Members Present (Add Signature Lines as Needed):

Certification

I, Casey Crawford, as Board Chair, certify that each Board Member has reviewed and participated in the selection of the individuals and vendors attached to this document as evidenced by the full Board of Director signatures outlined above. The information I am providing to the North Carolina State Board of Education as Movement Charter School is true and correct in every respect.

Signature

9-24-15
Date

Appendix V:

Charter School Required Signature Certification

Note: Outlined below is a list of areas that must be certified by the proposed Board of Directors. Any forms Not Applicable to the proposed charter school indicate below with N/A and provide a brief explanation for providing such response.

Serving on a public charter school board is a position of public trust and board members of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, the school's fulfillment of its public obligations, all terms of its charter, and understanding/overseeing all third party contracts with individuals or companies.

❖ The selected Board Attorney that he/she has reviewed with the full Board of Directors, listed within the application, all the governance documents and liabilities associated with being on the Board of a Non Profit Corporation.

- Name of the Selected Board Attorney: Scott Green / Richard Vinroot
- Date of Review: 2015
- Signature of Board Members Present (Add Signature Lines as Needed):

- _____
■ _____
■ _____
- _____
■ _____
■ _____
- _____
■ _____

❖ The selected Board Auditor that he/she has reviewed with the full Board of Directors, listed within the application, all the items required for the annual audit and 990 preparations.

- Name of the Selected Board Auditor: Darrell Keller, CPA
- Date of Review: 2015
- Signature of Board Members Present (Add Signature Lines as Needed):

■ _____
■ _____
- _____
■ _____
■ _____
- _____
■ _____
■ _____

❖ If contracting with a CMO/EMO, that the selected management company has reviewed with the full Board of Directors, listed within the application, all the items required and the associated management contract and operations.

- Name of the Contact for Selected EMO/CMO: N/A not an EMO/CMO
- Date of Review: _____
- Signature of Board Members Present (Add Signature Lines as Needed):

❖ If contracting with a financial management service provider that the selected financial service provider has reviewed with the full Board of Directors, listed within the application, all the financial processes and services provided.

- Name of the Contact: Robin Mallette
- Name of the Selected Financial Service Provider: Acadio Northstar
- Date of Review: 2015
- Signature of Board Members Present (Add Signature Lines as Needed):

❖ If the proposed Board of Directors, listed within the application, is contracting with a service provider to operate PowerSchool that the service provider has reviewed all of the financial processes and services provided.

- Name of the Contact: N/A in-house through Office Manager
- Name of the Selected PowerSchool Service Provider: _____
- Date of Review: _____
- Signature of Board Members Present (Add Signature Lines as Needed):

Certification

I, Casey Crawford, as Board Chair, certify that each Board Member has reviewed and participated in the selection of the individuals and vendors attached to this document as evidenced by the full Board of Director signatures outlined above. The information I am providing to the North Carolina State Board of Education as Movement Charter School is true and correct in every respect.

Signature

9-24-15
Date