

Appendices

The appendices are designed to complement the overall application and charter school plan. Make sure you follow all directions for appendices attached to the application. Some appendices within the application have specific directions and page limits. The required appendices have a single asterisk (*). Without these appendices the application shall be deemed incomplete. Appendices with two asterisks (**) are required only if the board contracts with a management group (Appendix A4.1) or is utilizing additional revenue resources to meet their budgetary needs (Appendix M). Appendix O should only be used to provide additional information that you believe will assist the State Board of Education in the consideration of your application. No more than 10 pages are permitted for Appendix O. The cover page template to be used for each appendix is available on the next page.

Appendix A1 – Acceleration Evidences

Appendix A2.1 – Public Conversion Evidences

Appendix A2.2 – Private Conversion Evidences

Appendix A3.1 – Replication Educational Outcomes

Appendix A3.2 – Replication Financial Records (IRS 990)

Appendix A4.1 – Executed CMO/EMO Contract (if contracting with an EMO or CMO)**

Appendix A4.2 – EMO/CMO Facility Buyout Agreement**

Appendix A4.3 – EMO/CMO Financial History (Bank Statements)**

Appendix A4.4 – IRS Form 990**

Appendix A – Evidence of Parent/Community Support*

Appendix B – Curriculum Outline for Each Grade Band the School Will Ultimately Serve*

Appendix C – 9-12 Core Content Electives

Appendix D – Yearly Academic Calendar*

Appendix E – Daily and Weekly Schedule for Each Grade Band the School Will Ultimately Serve*

Appendix F – Federal Documentation of Tax-Exempt Status

Appendix G – Organizational Chart*

Appendix H – Charter School Board Member Response and Resume*

Appendix I – Board Member Background Certification Statement and Completed Background Check*

Appendix J – Proposed By-Laws of the School’s Board of Directors*

Appendix K – Articles of Incorporation or Municipal Charter*

Appendix L – Insurance Quotes*

Appendix M – Revenue Assurances and/or Working Capital Report**

Appendix N – Proposed School Budget for Year 1 through Year 5*

Appendix O – Additional Appendices Provided by Applicant

Appendix P – Required Signed and Notarized Documents*



Appendix A3.1: Replication Educational Outcomes

Oak Grove Charter Academy

Replication Educational Outcomes: Our Board intends to replicate the model currently in place at Wake Forest Charter Academy (WFCA). WFCA has consistently received a “B” letter grade for the past three academic years, and also met or exceeded growth during this timeframe.

Wake Forest Charter Academy Academic Performance Data (Past 3 School Years)						
Year	Reading Proficiency			Math Proficiency		
	WFCA	Wake County Schools	(+/-)	WFCA	Wake County Schools	(+/-)
2015-16	72%	67%	5%	71%	68%	3%
2016-17	76%	67%	9%	79%	66%	13%
2017-18	76%	65%	11%	77%	63%	14%

Over the course of these three school years, WFCA outperformed Wake County Schools in both math and reading.

WFCA was recently renewed by the North Carolina State Board of Education for a term of 10 years. This is due in part to the success in working towards meeting the academic goals within their initial charter contract. This includes the following:

- Each year, our school will administer a nationally recognized standardized growth assessment in grades 3-8. In the spring of each year, the school will score at or above the 50th percentile or higher of public schools nationally as measured by beginning to end of year growth in grades 3-8. – **Met in nine of 12 grades and subjects every year the school has been operating.**
- On the average of all End of Grade (EOG)/End of Course (EOC) assessments administered, students who are enrolled in at least their second year at Wake Forest Charter Academy will meet or exceed the average performance of the demographically similar nearest neighbor schools. The comparison scores will be populated by the weighted total of EOG/EOC scores from the nearest schools that demographically match the population of Wake Forest Charter Academy. – **Met in 2016-17. In 2017-18, Wake Forest students achieved 77 percent proficiency, comparable to the closest five demographically similar schools.**
- Students who are enrolled in at least their third year at Wake Forest Charter Academy will demonstrate measurable progress toward meeting the college readiness thresholds in Math and English, as measured by the nationally recognized standardized assessment administered in grade 8. – **Met in 2017-18 (the first year data was available to measure against the goal).**
- The school will meet Expected Growth as measured by the EOG, and/or have an annual performance composite above 60 percent in any two years in a three-year period. – **Met every year the school has been operating.**



Appendix A3.2: Replication Financial Records (IRS 990)

Oak Grove Charter Academy

Included are the most recent IRS Form 990s for Wake Forest Charter Academy Fiscal Years 2015, 2016, and 2017 (we are proposing to replicate Wake Forest Charter Academy). NHA is a privately held company, and does not submit a Form 990, making this not applicable to the organization.

Form **990**

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2015

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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.

A For the 2015 calendar year, or tax year beginning 07/01, 2015, and ending 06/30, 2016

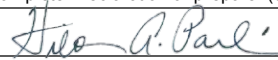
B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization WAKE FOREST CHARTER ACADEMY			D Employer identification number 90-0942554	
	Doing business as			E Telephone number (616) 222-1700	
	Number and street (or P.O. box if mail is not delivered to street address) Room/suite 1851 FRIENDSHIP CHAPEL ROAD		G Gross receipts \$ 4,699,141.		
	City or town, state or province, country, and ZIP or foreign postal code WAKE FOREST, NC 27587			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 type="checkbox"/> No If "No," attach a list. (see instructions)	
F Name and address of principal officer: HILDA PARLER 1851 FRIENDSHIP CHAPEL ROAD WAKE FOREST, NC 27587			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: ▶ WWW.NHASCHOOLS.COM					
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: 2013 M State of legal domicile: NC	

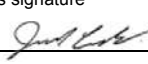
Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: TO OPERATE A PUBLIC CHARTER SCHOOL WHICH PROVIDES EDUCATION BASED ON RIGOROUS TEACHING METHODS, PARENTAL INVOLVEMENT, STUDENT RESPONSIBILITY, AND BASIC MORAL VALUES.	
	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 7.
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4 7.
	5 Total number of individuals employed in calendar year 2015 (Part V, line 2a)	5 0.
	6 Total number of volunteers (estimate if necessary)	6 504.
	7a Total unrelated business revenue from Part VIII, column (C), line 12	7a 0.
7b Net unrelated business taxable income from Form 990-T, line 34	7b 0.	
Revenue	8 Contributions and grants (Part VIII, line 1h)	3,522,894. 4,505,651.
	9 Program service revenue (Part VIII, line 2g)	163,190. 158,490.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	0. 0.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	35,000. 35,000.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	3,721,084. 4,699,141.
	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)		0. 0.
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)		1,864,146. 2,237,963.
16a Professional fundraising fees (Part IX, column (A), line 11e)		0. 0.
b Total fundraising expenses (Part IX, column (D), line 25) ▶		0.
17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)		1,845,491. 2,452,908.
18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	3,709,637. 4,690,871.	
19 Revenue less expenses. Subtract line 18 from line 12	11,447. 8,270.	
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	235,634. 311,389.
	21 Total liabilities (Part X, line 26)	224,187. 291,672.
	22 Net assets or fund balances. Subtract line 21 from line 20	11,447. 19,717.

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: 	Date: 1/26/2017
	Type or print name and title: HILDA PARLER PRESIDENT	

Paid Preparer Use Only	Print/Type preparer's name: JACOB COOK	Preparer's signature: 	Date: 01/24/2017	Check <input type="checkbox"/> if self-employed	PTIN: P01240455
	Firm's name ▶ BDO USA, LLP			Firm's EIN ▶ 13-5381590	
	Firm's address ▶ 200 OTTAWA AVE NW STE 300 GRAND RAPIDS, MI 49503			Phone no. 616-774-7000	

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

For Paperwork Reduction Act Notice, see the separate instructions.

Form **990** (2015)

Form **8868**

(Rev. January 2014)

Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

▶ **File a separate application for each return.**
▶ Information about Form 8868 and its instructions is at www.irs.gov/form8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. WAKE FOREST CHARTER ACADEMY	Employer identification number (EIN) or 90-0942554
	Number, street, and room or suite no. If a P.O. box, see instructions. 1851 FRIENDSHIP CHAPEL ROAD	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. WAKE FOREST, NC 27587-0000	

Enter the Return code for the return that this application is for (file a separate application for each return)

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STEPHEN CONLEY

- The books are in the care of ▶ 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS, MI 49512

Telephone No. ▶ 616 222-1700 FAX No. ▶ 616 831-6311

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ . If this is for the whole group, check this box . If it is for part of the group, check this box and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 02/15, 2017, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
 ▶ calendar year 20____ or
 ▶ tax year beginning 07/01, 2015, and ending 06/30, 2016.

2 If the tax year entered in line 1 is for less than 12 months, check reason: Initial return Final return Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.		3a	\$	0.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.		3b	\$	0.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.		3c	\$	0.

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2014)

JSA

5F8054 1.000

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:

ATTACHMENT 1

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.

4a (Code:) (Expenses \$ 3,863,371. including grants of \$) (Revenue \$ 97,957.)

OPERATED AN EDUCATIONAL INSTITUTION ORGANIZED AS A PUBLIC SCHOOL ACADEMY. THE ACADEMY PROVIDES EDUCATION, AT NO COST TO THE PARENT, TO STUDENTS IN KINDERGARTEN THROUGH SIXTH GRADE. THE ACADEMY OPERATES UNDER A CHARTER APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION.

4b (Code:) (Expenses \$ 165,346. including grants of \$) (Revenue \$ 60,533.)

OPERATED A SCHOOL FOOD SERVICE PROGRAM AT THE PUBLIC SCHOOL ACADEMY DESCRIBED ABOVE. THE ACADEMY OFFERS FREE OR REDUCED LUNCH FOR FAMILIES THAT QUALIFY. FUNDING FOR THIS PROGRAM WAS PROVIDED BY THE USDA FOOD AND NUTRITION SERVICE, IN THE AMOUNT OF \$37,363.

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

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

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

4e Total program service expenses 4,028,717.

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

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
1a Enter the number of voting members of the governing body at the end of the tax year	7		
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	7		
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?	2		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? . .	3	X	
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		X
5 Did the organization become aware during the year of a significant diversion of the organization's assets?	5		X
6 Did the organization have members or stockholders?	6		X
7a 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?	7a		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?	7b		X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
a The governing body?	8a	X	
b Each committee with authority to act on behalf of the governing body?	8b	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	9		X

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

		Yes	No
10a Did the organization have local chapters, branches, or affiliates?	10a		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? . .	10b		
11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? .	11a	X	
b Describe in Schedule O the process, if any, used by the organization to review this Form 990.			
12a Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	X	
b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	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	12c	X	
13 Did the organization have a written whistleblower policy?	13		X
14 Did the organization have a written document retention and destruction policy?	14	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	15a		X
b Other officers or key employees of the organization	15b		X
If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).			
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		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?	16b		

Section C. Disclosure

- 17** List the states with which a copy of this Form 990 is required to be filed ► NONE
- 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: ►
STEPHEN CONLEY 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS, MI 49512 616-222-1700

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. X

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

1a 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.

X 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) HILDA PARLER PRESIDENT	1.00 0.	X		X				0.	0.	0.
(2) MARILYN BONNETT VICE PRESIDENT	1.00 0.	X		X				0.	0.	0.
(3) SALINA GARY SECRETARY	1.00 0.	X		X				0.	0.	0.
(4) MARK MARLEY TREASURER	1.00 0.	X		X				0.	0.	0.
(5) DR. DANIEL LAWSON DIRECTOR	1.00 0.	X						0.	0.	0.
(6) WILLIAM GOCCIA DIRECTOR	1.00 0.	X						0.	0.	0.
(7) VIVIANNE VALDES-HURTADO SEGREV DIRECTOR	1.00 0.	X						0.	0.	0.
(8) -----										
(9) -----										
(10) -----										
(11) -----										
(12) -----										
(13) -----										
(14) -----										

Part VIII Statement of Revenue

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

				(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	1a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c					
	d Related organizations	1d					
	e Government grants (contributions)	1e	4,505,651.				
	f All other contributions, gifts, grants, and similar amounts not included above	1f					
	g Noncash contributions included in lines 1a-1f: \$						
	h Total. Add lines 1a-1f ▶			4,505,651.			
Program Service Revenue			Business Code				
	2a FOOD SERVICE REVENUE		611600	60,533.	60,533.		
	b MISCELLANEOUS ACTIVITY FEES		900099	97,957.	97,957.		
	c						
	d						
	e						
	f All other program service revenue						
g Total. Add lines 2a-2f ▶			158,490.				
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts). ▶			0.			
	4 Income from investment of tax-exempt bond proceeds ▶			0.			
	5 Royalties ▶			0.			
	6a Gross rents	(i) Real	(ii) Personal				
	b Less: rental expenses						
	c Rental income or (loss)						
	d Net rental income or (loss) ▶			0.			
	7a 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) ▶			0.			
	8a 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 ▶			0.				
9a Gross income from gaming activities. See Part IV, line 19 a							
b Less: direct expenses b							
c Net income or (loss) from gaming activities ▶			0.				
10a 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 ▶			0.			
Miscellaneous Revenue			Business Code				
11a DISCRETIONARY SUPPORT		611710	35,000.			35,000.	
b							
c							
d All other revenue							
e Total. Add lines 11a-11d ▶			35,000.				
12 Total revenue. See instructions. ▶			4,699,141.	158,490.		35,000.	

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 X

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	0.			
2 Grants and other assistance to domestic individuals. See Part IV, line 22	0.			
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16	0.			
4 Benefits paid to or for members	0.			
5 Compensation of current officers, directors, trustees, and key employees	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)	0.			
7 Other salaries and wages	1,683,728.	1,683,728.		
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	37,014.	37,014.		
9 Other employee benefits	371,474.	371,474.		
10 Payroll taxes	145,747.	145,747.		
11 Fees for services (non-employees):				
a Management	0.			
b Legal	0.			
c Accounting	75,655.	8,652.	67,003.	
d Lobbying	0.			
e Professional fundraising services. See Part IV, line 17.	0.			
f Investment management fees	0.			
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)	227,440.	227,440.		
12 Advertising and promotion	25,975.	415.	25,560.	
13 Office expenses	282,739.	282,739.		
14 Information technology	0.			
15 Royalties	0.			
16 Occupancy	1,756,941.	1,629,754.	127,187.	
17 Travel	15,723.	15,723.		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	0.			
19 Conferences, conventions, and meetings	63,428.	63,428.		
20 Interest	0.			
21 Payments to affiliates	0.			
22 Depreciation, depletion, and amortization	0.			
23 Insurance	16,633.	16,633.		
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>IN-KIND SERVICES</u>	-632,631.	-686,340.	53,709.	
b <u>FOOD SERVICE</u>	165,346.	165,346.		
c <u>INSTRUCTIONAL SUPPORT</u>	97,579.		97,579.	
d <u>DISCRETIONARY EXPENSES</u>	76,740.		76,740.	
e All other expenses	281,340.	66,964.	214,376.	
25 Total functional expenses. Add lines 1 through 24e	4,690,871.	4,028,717.	662,154.	
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)	0.			

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	232,107.	1	302,144.
	2 Savings and temporary cash investments	0.	2	0.
	3 Pledges and grants receivable, net	639.	3	5,169.
	4 Accounts receivable, net	0.	4	0.
	5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L	0.	5	0.
	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	0.	6	0.
	7 Notes and loans receivable, net	0.	7	0.
	8 Inventories for sale or use	0.	8	0.
	9 Prepaid expenses and deferred charges	2,888.	9	4,076.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D		10a	
	b Less: accumulated depreciation	0.	10c	0.
	11 Investments - publicly traded securities	0.	11	0.
	12 Investments - other securities. See Part IV, line 11	0.	12	0.
	13 Investments - program-related. See Part IV, line 11	0.	13	0.
	14 Intangible assets	0.	14	0.
	15 Other assets. See Part IV, line 11	0.	15	0.
16 Total assets. Add lines 1 through 15 (must equal line 34)	235,634.	16	311,389.	
Liabilities	17 Accounts payable and accrued expenses	0.	17	0.
	18 Grants payable	0.	18	0.
	19 Deferred revenue	5,398.	19	25,775.
	20 Tax-exempt bond liabilities	0.	20	0.
	21 Escrow or custodial account liability. Complete Part IV of Schedule D	0.	21	0.
	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	0.	22	0.
	23 Secured mortgages and notes payable to unrelated third parties	0.	23	0.
	24 Unsecured notes and loans payable to unrelated third parties	0.	24	0.
	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	218,789.	25	265,897.
	26 Total liabilities. Add lines 17 through 25	224,187.	26	291,672.
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	11,447.	27	19,717.
	28 Temporarily restricted net assets	0.	28	0.
	29 Permanently restricted net assets	0.	29	0.
	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	11,447.	33	19,717.
34 Total liabilities and net assets/fund balances	235,634.	34	311,389.	

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	4,699,141.
2	Total expenses (must equal Part IX, column (A), line 25)	2	4,690,871.
3	Revenue less expenses. Subtract line 2 from line 1	3	8,270.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	11,447.
5	Net unrealized gains (losses) on investments	5	0.
6	Donated services and use of facilities	6	0.
7	Investment expenses	7	0.
8	Prior period adjustments	8	0.
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	19,717.

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.		
2a 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
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	
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	
3a 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	
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	

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 WAKE FOREST CHARTER ACADEMY	Employer identification number 90-0942554
--	---

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						

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ. Schedule A (Form 990 or 990-EZ) 2015

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						<input type="checkbox"/>

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		<input type="checkbox"/>
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		<input type="checkbox"/>
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		<input type="checkbox"/>
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		<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 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**

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 ►

Part IV Supporting Organizations

(Complete only if you checked a box in 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? <i>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.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i>		
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)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked 11a or 11b in Part I, answer (b) and (c) below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>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.</i>		
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)? <i>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.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>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).</i>		
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 (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
9a 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))? <i>If "Yes," provide detail in Part VI.</i>		
b Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

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?	11 a	
b A family member of a person described in (a) above?	11 b	
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>	11 c	

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, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) 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

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions):			
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (<i>see instructions</i>).			
2 Activities Test. Answer (a) and (b) below.		Yes	No
a 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? <i>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.</i>	2a		
b 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? <i>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.</i>	2b		
3 Parent of Supported Organizations. Answer (a) and (b) below.			
a 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? <i>Provide details in Part VI.</i>	3a		
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>	3b		

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 Nov. 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	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
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	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions).		

Schedule A (Form 990 or 990-EZ) 2015

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 2015 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-2015	(iii) Distributable Amount for 2015
1 Distributable amount for 2015 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2015 (reasonable cause required-see instructions)			
3 Excess distributions carryover, if any, to 2015:			
a			
b			
c			
d From 2013			
e From 2014			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2015 distributable amount			
i Carryover from 2010 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2015 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2015 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4.			
5 Remaining underdistributions for years prior to 2015, if any. Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions).			
6 Remaining underdistributions for 2015. Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions).			
7 Excess distributions carryover to 2016. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a			
b			
c Excess from 2013			
d Excess from 2014			
e Excess from 2015			

Schedule A (Form 990 or 990-EZ) 2015

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 B
 (Form 990, 990-EZ,
 or 990-PF)
 Department of the Treasury
 Internal Revenue Service

Schedule of Contributors

OMB No. 1545-0047

2015

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**
 Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.

Name of the organization WAKE FOREST CHARTER ACADEMY	Employer identification number 90-0942554
--	---

Organization type (check one):

- | Filers of: | Section: |
|--------------------|---|
| Form 990 or 990-EZ | <input checked="" type="checkbox"/> 501(c)(3) (enter number) organization |
| | <input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation |
| | <input type="checkbox"/> 527 political organization |
| Form 990-PF | <input type="checkbox"/> 501(c)(3) exempt private foundation |
| | <input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation |
| | <input type="checkbox"/> 501(c)(3) taxable private foundation |

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization WAKE FOREST CHARTER ACADEMY	Employer identification number 90-0942554
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Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	_____	\$ 3,036,566.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	_____	\$ 1,295,980.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	_____	\$ 135,742.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	_____	\$ 37,363.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	_____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	_____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization **WAKE FOREST CHARTER ACADEMY**

Employer identification number

90-0942554

Part II Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____	\$ _____	_____

Name of organization WAKE FOREST CHARTER ACADEMY	Employer identification number 90-0942554
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Part III *Exclusively* religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

**SCHEDULE D
(Form 990)**

Supplemental Financial Statements

OMB No. 1545-0047

2015

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

▶ Complete if the organization answered "Yes" on Form 990,
Part IV, line 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.

Name of the organization

Employer identification number

WAKE FOREST CHARTER ACADEMY

90-0942554

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

Complete if the organization answered "Yes" on 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" on 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	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register	2d
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?	<input type="checkbox"/> Yes <input type="checkbox"/> No
6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ _____	
7 Amount of expenses incurred in monitoring, inspecting, handling of violations, 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)?	<input type="checkbox"/> Yes <input type="checkbox"/> 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" on Form 990, Part IV, line 8.

1a 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 ▶ \$ _____	

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule D (Form 990) 2015

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" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a** 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 | 1c |
| d Additions during the year | 1d |
| e Distributions during the year | 1e |
| f Ending balance | 1f |
- 2a** 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 on Part XIII

Part V Endowment Funds.

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a 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 on lines 2a, 2b, and 2c should equal 100%.
- 3a** 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" on line 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" on 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
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment				
e Other				
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) ▶				

Part VII Investments - Other Securities.

Complete if the organization answered "Yes" on 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) _____		
Total. (Column (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

Part VIII Investments - Program Related.

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

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

Part IX Other Assets.

Complete if the organization answered "Yes" on 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)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	

Part X Other Liabilities.

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

1. (a) Description of liability	(b) Book value	
(1) Federal income taxes		
(2) CONTRACTED SERVICE FEE PAYABLE	265,897.	
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Column (b) must equal Form 990, Part X, col. (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 XIII Supplemental Information (continued)

SCHEDULE D, PART X, LINE 2:

THE AUDITED FINANCIAL STATEMENTS DO NOT REFERENCE ANY UNCERTAIN INCOME
TAX POSITIONS.

SCHEDULE D, PART XI, LINE 4B

DISCRETIONARY SUPPORT: \$35,000

SCHEDULE D, PART XII, LINE 4B

DISCRETIONARY EXPENSES: \$35,000

**SCHEDULE E
(Form 990 or 990-EZ)**

Schools

OMB No. 1545-0047

2015

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

▶ **Complete if the organization answered "Yes" on 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

WAKE FOREST CHARTER ACADEMY

Employer identification number

90-0942554

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>SEE SUPPLEMENTAL PAGE</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.		
6a 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	

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

Schedule E (Form 990 or 990-EZ) 2015

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).

SCHEDULE E, PART I, LINE 3:

THE SCHOOL'S RACIALLY NONDISCRIMINATORY POLICY IS DISCLOSED ON ALL STUDENT APPLICATIONS AND PUBLISHED WITH OPEN ENROLLMENT ADVERTISEMENTS IN LOCAL NEWSPAPERS. THE NOTICE OF ITS RACIALLY NONDISCRIMINATORY POLICY IS PUBLISHED ANNUALLY DURING THE PERIOD PRIOR TO THE SCHOOLS SOLICITATION IN LOCAL NEWSPAPERS WHICH ARE AVAILABLE FOR CIRCULATION TO ALL SEGMENTS OF THE COMMUNITY. THE PARTICULARS AS TO COLUMN SIZE, PRINT AND TYPE SPECIFIED BY THE IRS ARE MET OR EXCEEDED.

SCHEDULE E, PART I, LINE 6: EXPLANATION OF GOVERNMENTAL FINANCIAL AID:

THE SCHOOL RECEIVES SUPPORT GRANTS FROM FEDERAL, STATE, AND LOCAL AGENCIES.

SCHEDULE O
(Form 990 or 990-EZ)Department of the Treasury
Internal Revenue Service**Supplemental Information to Form 990 or 990-EZ**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.

OMB No. 1545-0047

2015**Open to Public
Inspection**

Name of the organization

WAKE FOREST CHARTER ACADEMY

Employer identification number

90-0942554

FORM 990, PART VI, LINE 3:

THE BOARD OF DIRECTORS OF THE ACADEMY HAS ENTERED INTO A MANAGEMENT AGREEMENT ("THE AGREEMENT") WITH NATIONAL HERITAGE ACADEMIES, INC. ("NHA") FOR THE PROVISION OF ALL EDUCATIONAL, MANAGEMENT AND BUSINESS SERVICES RELATED TO THE OPERATION OF THE ACADEMY. THE AGREEMENT WAS SUBMITTED AND APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION AS PART OF THE CHARTERING PROCESS. PURSUANT TO THE TERMS OF THE AGREEMENT, NHA RECEIVES ALL REVENUE ALLOCATED TO THE ACADEMY AS ITS MANAGEMENT FEE, FROM WHICH IT PROVIDES ITS COMPREHENSIVE EDUCATIONAL MANAGEMENT SERVICES AS SPECIFIED IN THE AGREEMENT AND REQUIRED UNDER THE ACADEMY'S CHARTER (I.E., ALL OF THE OPERATING COSTS OF THE ACADEMY IDENTIFIED IN THE BUDGET APPROVED BY THE ACADEMY'S BOARD). THE FUNCTIONAL EXPENSES REPORTED IN PART IX ARE THE EXPENSES PAID FROM THE FUNDS REMITTED UNDER THE NHA AGREEMENT. IN THE EVENT EXPENSES EXCEED REVENUES, NHA COVERS THE SHORTFALL WITH AN IN-KIND CONTRIBUTION. THIS AGREEMENT HAS BEEN APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION DURING THE ACADEMY'S CHARTER PROCESS AS WELL AS THE INTERNAL REVENUE SERVICE DURING THE ACADEMY'S EXEMPTION APPLICATION PROCESS.

FORM 990, PART VI, LINE 11B:

A DRAFT COPY OF THE FORM 990 WAS PROVIDED TO THE BOARD OF DIRECTORS IN A PACKAGE OF MATERIALS FOR BOARD REVIEW PRIOR TO THE SCHEDULED BOARD MEETING HELD BEFORE THE FILING OF THIS RETURN.

Name of the organization WAKE FOREST CHARTER ACADEMY	Employer identification number 90-0942554
---	--

FORM 990, PART VI, LINE 12C:

THE ACADEMY'S BYLAWS REQUIRE THAT ANY DIRECTOR, OFFICER, KEY EMPLOYEE OR COMMITTEE MEMBER WHO HAS A CONFLICT OF INTEREST MUST PROMPTLY NOTIFY THE BOARD OF THE CONFLICT AND THE CONFLICT WILL BE DULY NOTED IN THE BOARD OF DIRECTOR MEETING MINUTES. THE PERSON WITH THE CONFLICT WILL BE EXCLUDED FROM DECISION MAKING ON THIS ISSUE. THE BOARD MAY TAKE FORMAL, CORRECTIVE AND DISCIPLINARY ACTION IF PROPER DISCLOSURE OF CONFLICTS OF INTEREST ARE NOT MADE.

FORM 990, PART VI, LINE 19:

DOCUMENTS APPROVED BY THE BOARD OF DIRECTORS, INCLUDING THE ACADEMY'S GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICIES AND AUDITED FINANCIAL STATEMENTS ARE AVAILABLE TO THE PUBLIC UPON REQUEST.

ATTACHMENT 1

FORM 990, PART III, LINE 1 - ORGANIZATION'S MISSION

TO OPERATE A PUBLIC CHARTER SCHOOL AND TO PROVIDE EDUCATION TO CHILDREN IN GRADES KINDERGARTEN THROUGH SIXTH GRADE BASED ON RIGOROUS TEACHING METHODS, PARENTAL INVOLVEMENT, STUDENT RESPONSIBILITY, AND BASIC MORAL VALUES. ENROLLMENT IS OPEN TO ALL APPROPRIATELY AGED CHILDREN WITHOUT REGARD TO GENDER, ETHNIC BACKGROUND, DISABILITY, AND/OR RELIGIOUS AFFILIATION.

ATTACHMENT 2

990, PART VII- COMPENSATION OF THE FIVE HIGHEST PAID IND. CONTRACTORS

<u>NAME AND ADDRESS</u>	<u>DESCRIPTION OF SERVICES</u>	<u>COMPENSATION</u>
NATIONAL HERITAGE ACADEMIES, INC. 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS, MI 49512	MANAGEMENT SERVICES	3,439,465.

Form **990**

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2016

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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.

A For the 2016 calendar year, or tax year beginning 07/01, 2016, and ending 06/30, 2017


B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization WAKE FOREST CHARTER ACADEMY			D Employer identification number 90-0942554	
	Doing business as			E Telephone number (616) 222-1700	
	Number and street (or P.O. box if mail is not delivered to street address) Room/suite 1851 FRIENDSHIP CHAPEL ROAD		G Gross receipts \$ 5,511,219.		
	City or town, state or province, country, and ZIP or foreign postal code WAKE FOREST, NC 27587			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 type="checkbox"/> No If "No," attach a list. (see instructions)	
F Name and address of principal officer: HILDA PARLER 1851 FRIENDSHIP CHAPEL ROAD WAKE FOREST, NC 27587			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: WWW.NHASCHOOLS.COM			H(c) Group exemption number ▶		
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: 2013		M State of legal domicile: NC

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: TO OPERATE A PUBLIC CHARTER SCHOOL WHICH PROVIDES EDUCATION BASED ON RIGOROUS TEACHING METHODS, PARENTAL INVOLVEMENT, STUDENT RESPONSIBILITY, AND BASIC MORAL VALUES.		
	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	7.
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	7.
	5 Total number of individuals employed in calendar year 2016 (Part V, line 2a)	5	0.
	6 Total number of volunteers (estimate if necessary)	6	654.
	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	0.	
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	9 Program service revenue (Part VIII, line 2g)	4,505,651.	5,312,343.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	158,490.	163,876.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	0.	0.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	35,000.	35,000.
		4,699,141.	5,511,219.
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.	0.
	14 Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	2,237,963.	2,500,899.
	16a Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	b Total fundraising expenses (Part IX, column (D), line 25) ▶	0.	
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	2,452,908.	3,006,523.
18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	4,690,871.	5,507,422.	
19 Revenue less expenses. Subtract line 18 from line 12	8,270.	3,797.	
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	Beginning of Current Year	End of Year
	21 Total liabilities (Part X, line 26)	311,389.	218,243.
	22 Net assets or fund balances. Subtract line 21 from line 20	291,672.	194,729.
	19,717.	23,514.	

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		5/9/2018 Date		
	HILDA PARLER Type or print name and title		PRESIDENT		
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	JACOB COOK		5/08/2018		P01240455
	Firm's name ▶ BDO USA, LLP	Firm's EIN ▶ 13-5381590		Phone no. 616-774-7000	
Firm's address ▶ 200 OTTAWA AVE NW STE 300 GRAND RAPIDS, MI 49503					

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

For Paperwork Reduction Act Notice, see the separate instructions.

Form **990** (2016)

Form **8868**

(Rev. January 2017)

Department of the Treasury
Internal Revenue Service

Application for Automatic Extension of Time To File an Exempt Organization Return

▶ **File a separate application for each return.**
▶ **Information about Form 8868 and its instructions is at www.irs.gov/form8868.**

OMB No. 1545-1709

Electronic filing (e-file). You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile, click on Charities & Non-Profits, and click on e-file for *Charities and Non-Profits*.

Automatic 6-Month Extension of Time. Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print	Enter filer's identifying number, see instructions	
	Name of exempt organization or other filer, see instructions. WAKE FOREST CHARTER ACADEMY	Employer identification number (EIN) or 90-0942554
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions. 1851 FRIENDSHIP CHAPEL ROAD	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. WAKE FOREST, NC 27587	

Enter the Return Code for the return that this application is for (file a separate application for each return)

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STEPHEN CONLEY

• The books are in the care of ▶ 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS MI 49512

Telephone No. ▶ 616 222-1700 Fax No. ▶ 616 831-6311

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ . If this is for the whole group, check this box . If it is for part of the group, check this box and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 6-month extension of time until 05/15, 2018, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- ▶ calendar year 20____ or
- ▶ tax year beginning 07/01, 2016, and ending 06/30, 2017.

2 If the tax year entered in line 1 is for less than 12 months, check reason: Initial return Final return Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	0.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	0.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2017)

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:

ATTACHMENT 1

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.

4a (Code:) (Expenses \$ 4,785,237. including grants of \$) (Revenue \$ 104,047.)

OPERATED AN EDUCATIONAL INSTITUTION ORGANIZED AS A PUBLIC SCHOOL ACADEMY. THE ACADEMY PROVIDES EDUCATION, AT NO COST TO THE PARENT, TO STUDENTS IN KINDERGARTEN THROUGH EIGHTH GRADE. THE ACADEMY OPERATES UNDER A CHARTER APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION.

4b (Code:) (Expenses \$ 175,048. including grants of \$) (Revenue \$ 59,829.)

OPERATED A SCHOOL FOOD SERVICE PROGRAM AT THE PUBLIC SCHOOL ACADEMY DESCRIBED ABOVE. THE ACADEMY OFFERS FREE OR REDUCED LUNCH FOR FAMILIES THAT QUALIFY. FUNDING FOR THIS PROGRAM WAS PROVIDED BY THE USDA FOOD AND NUTRITION SERVICE, IN THE AMOUNT OF \$40,914.

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

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

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

4e Total program service expenses 4,960,285.

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</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? <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>		
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

Table with columns for question numbers (1a-14b), Yes, and No. Contains various tax compliance questions such as 'Enter the number reported in Box 3 of Form 1096', 'Did the organization comply with backup withholding rules', and 'Sponsoring organizations maintaining donor advised funds'.

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

Section A. Governing Body and Management

		Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year 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.		
1b	Enter the number of voting members included in line 1a, above, who are independent		
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
7a	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
7b	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:		
8a	a The governing body?	X	
8b	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
10a	Did the organization have local chapters, branches, or affiliates?		X
10b	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? . .		
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? .	X	
11b	Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
12a	Did the organization have a written conflict of interest policy? If "No," go to line 13	X	
12b	b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
12c	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?		
15a	a The organization's CEO, Executive Director, or top management official		X
15b	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
16a	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
16b	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 ► _____
- 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: ►

ANNE SHERMAN 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS, MI 49512 616-222-1700

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

1a 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) HILDA PARLER PRESIDENT	1.00 0.	X		X				0.	0.	0.
(2) MARILYN BONNETT VICE PRESIDENT	1.00 0.	X		X				0.	0.	0.
(3) SALINA GARY SECRETARY	1.00 0.	X		X				0.	0.	0.
(4) MARK MARLEY TREASURER	1.00 0.	X		X				0.	0.	0.
(5) SCOTT DABAL DIRECTOR	1.00 0.	X						0.	0.	0.
(6) WILLIAM GOCCIA DIRECTOR	1.00 0.	X						0.	0.	0.
(7) VIVIANNE VALDES-HURTADO DIRECTOR	1.00 0.	X						0.	0.	0.
(8)										
(9)										
(10)										
(11)										
(12)										
(13)										
(14)										

Part VIII Statement of Revenue

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

				(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	1a Federated campaigns	1a						
	b Membership dues	1b						
	c Fundraising events	1c						
	d Related organizations	1d						
	e Government grants (contributions)	1e	5,312,343.					
	f All other contributions, gifts, grants, and similar amounts not included above	1f						
	g Noncash contributions included in lines 1a-1f: \$							
	h Total. Add lines 1a-1f ▶			5,312,343.				
	Program Service Revenue			Business Code				
2a FOOD SERVICE REVENUE			611600	59,829.	59,829.			
b MISCELLANEOUS ACTIVITY FEES			900099	104,047.	104,047.			
c								
d								
e								
g Total. Add lines 2a-2f ▶				163,876.				
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts). ▶			0.				
	4 Income from investment of tax-exempt bond proceeds ▶			0.				
	5 Royalties ▶			0.				
	6a Gross rents	(i) Real	(ii) Personal					
		b Less: rental expenses						
		c Rental income or (loss)						
	d Net rental income or (loss) ▶			0.				
	7a 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) ▶			0.				
	8a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18 a			0.				
		b Less: direct expenses b		0.				
		c Net income or (loss) from fundraising events ▶			0.			
	9a Gross income from gaming activities. See Part IV, line 19 a			0.				
b Less: direct expenses b			0.					
c Net income or (loss) from gaming activities ▶				0.				
10a Gross sales of inventory, less returns and allowances a			0.					
	b Less: cost of goods sold b		0.					
	c Net income or (loss) from sales of inventory ▶			0.				
Miscellaneous Revenue			Business Code					
11a DISCRETIONARY SUPPORT		611710	35,000.			35,000.		
b								
c								
d All other revenue								
e Total. Add lines 11a-11d ▶			35,000.					
12 Total revenue. See instructions. ▶			5,511,219.	163,876.		35,000.		

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 X

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	0.			
2 Grants and other assistance to domestic individuals. See Part IV, line 22	0.			
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16	0.			
4 Benefits paid to or for members	0.			
5 Compensation of current officers, directors, trustees, and key employees	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)	0.			
7 Other salaries and wages	1,890,589.	1,890,589.		
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	36,404.	36,404.		
9 Other employee benefits	421,414.	421,414.		
10 Payroll taxes	152,492.	152,492.		
11 Fees for services (non-employees):				
a Management	0.			
b Legal	0.			
c Accounting	75,980.	8,904.	67,076.	
d Lobbying	0.			
e Professional fundraising services. See Part IV, line 17.	0.			
f Investment management fees	0.			
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)	335,232.	335,232.		
12 Advertising and promotion	24,773.	167.	24,606.	
13 Office expenses	251,376.	251,376.		
14 Information technology	62,463.		62,463.	
15 Royalties	0.			
16 Occupancy	1,734,250.	1,727,580.	6,670.	
17 Travel	7,059.	7,059.		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	0.			
19 Conferences, conventions, and meetings	71,180.	71,180.		
20 Interest	0.			
21 Payments to affiliates	0.			
22 Depreciation, depletion, and amortization	0.			
23 Insurance	21,392.	21,392.		
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 IN-KIND SERVICES	-191,490.	-191,490.		
b FOOD SERVICE	175,048.	175,048.		
c INSTRUCTIONAL SUPPORT	103,136.		103,136.	
d DISCRETIONARY EXPENSES	67,797.		67,797.	
e All other expenses	268,327.	52,938.	215,389.	
25 Total functional expenses. Add lines 1 through 24e	5,507,422.	4,960,285.	547,137.	
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)	0.			

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	302,144.	1	174,707.
	2 Savings and temporary cash investments	0.	2	0.
	3 Pledges and grants receivable, net	5,169.	3	39,971.
	4 Accounts receivable, net	0.	4	0.
	5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L	0.	5	0.
	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	0.	6	0.
	7 Notes and loans receivable, net	0.	7	0.
	8 Inventories for sale or use	0.	8	0.
	9 Prepaid expenses and deferred charges	4,076.	9	3,565.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D		10a	
	b Less: accumulated depreciation	0.	10c	0.
	11 Investments - publicly traded securities	0.	11	0.
	12 Investments - other securities. See Part IV, line 11	0.	12	0.
	13 Investments - program-related. See Part IV, line 11	0.	13	0.
	14 Intangible assets	0.	14	0.
	15 Other assets. See Part IV, line 11	0.	15	0.
16 Total assets. Add lines 1 through 15 (must equal line 34)	311,389.	16	218,243.	
Liabilities	17 Accounts payable and accrued expenses	0.	17	0.
	18 Grants payable	0.	18	0.
	19 Deferred revenue	25,775.	19	29,247.
	20 Tax-exempt bond liabilities	0.	20	0.
	21 Escrow or custodial account liability. Complete Part IV of Schedule D	0.	21	0.
	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	0.	22	0.
	23 Secured mortgages and notes payable to unrelated third parties	0.	23	0.
	24 Unsecured notes and loans payable to unrelated third parties	0.	24	0.
	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	265,897.	25	165,482.
	26 Total liabilities. Add lines 17 through 25	291,672.	26	194,729.
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	19,717.	27	23,514.
	28 Temporarily restricted net assets	0.	28	0.
	29 Permanently restricted net assets	0.	29	0.
	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	19,717.	33	23,514.
	34 Total liabilities and net assets/fund balances	311,389.	34	218,243.

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	5,511,219.
2	Total expenses (must equal Part IX, column (A), line 25)	2	5,507,422.
3	Revenue less expenses. Subtract line 2 from line 1	3	3,797.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	19,717.
5	Net unrealized gains (losses) on investments	5	0.
6	Donated services and use of facilities	6	0.
7	Investment expenses	7	0.
8	Prior period adjustments	8	0.
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	23,514.

Part XII Financial Statements and Reporting

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

- 1** Accounting method used to prepare the Form 990: Cash Accrual Other _____
If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.
- 2a** 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:
 Separate basis Consolidated basis Both consolidated and separate basis
- 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:
 Separate basis Consolidated basis Both consolidated and separate basis
- 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.
- 3a** 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?
- 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.

	Yes	No
2a		X
2b	X	
2c	X	
3a		X
3b		

SCHEDULE A
(Form 990 or 990-EZ)

Public Charity Status and Public Support

OMB No. 1545-0047

2016

Open to Public Inspection

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.

Name of the organization

WAKE FOREST CHARTER ACADEMY

Employer identification number

90-0942554

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 12, 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 agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
- 10 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.)
- 11 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12 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 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
 - 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 1-10 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						

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

Schedule A (Form 990 or 990-EZ) 2016

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) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(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) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(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 2016 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2015 Schedule A, Part II, line 14	15	%
16a 33 1/3% support test - 2016. 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		<input type="checkbox"/>
b 33 1/3% support test - 2015. 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 - 2016. 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 - 2015. 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 10 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) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(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) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(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**

Section C. Computation of Public Support Percentage

15 Public support percentage for 2016 (line 8, column (f) divided by line 13, column (f)).	15	%
16 Public support percentage from 2015 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2016 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2015 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2016. 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 - 2015. 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 in line 12 on Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d 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? <i>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.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i>		
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)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>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.</i>		
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)? <i>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.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>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).</i>		
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 (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
9a 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))? <i>If "Yes," provide detail in Part VI.</i>		
b Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

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, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) 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

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
c <input type="checkbox"/> 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.		Yes	No
a 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? <i>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.</i>	2a		
b 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? <i>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.</i>	2b		
3 Parent of Supported Organizations. Answer (a) and (b) below.			
a 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? <i>Provide details in Part VI.</i>	3a		
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>	3b		

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 Nov. 20, 1970 (explain in Part VI). **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	1a		
b Average monthly cash balances	1b		
c Fair market value of other non-exempt-use assets	1c		
d Total (add lines 1a, 1b, and 1c)	1d		
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).

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 2016 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-2016	(iii) Distributable Amount for 2016
1 Distributable amount for 2016 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2016 (reasonable cause required-explain in Part VI). See instructions.			
3 Excess distributions carryover, if any, to 2016:			
a			
b			
c From 2013.			
d From 2014.			
e From 2015.			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2016 distributable amount			
i Carryover from 2011 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2016 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2016 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4.			
5 Remaining underdistributions for years prior to 2016, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.			
6 Remaining underdistributions for 2016. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.			
7 Excess distributions carryover to 2017. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a			
b Excess from 2013. . . .			
c Excess from 2014. . . .			
d Excess from 2015. . . .			
e Excess from 2016. . . .			

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

Schedule B
 (Form 990, 990-EZ,
 or 990-PF)
 Department of the Treasury
 Internal Revenue Service

Schedule of Contributors

OMB No. 1545-0047

2016

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**

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

Name of the organization

WAKE FOREST CHARTER ACADEMY

Employer identification number

90-0942554

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)(3) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization WAKE FOREST CHARTER ACADEMY	Employer identification number 90-0942554
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Part I **Contributors** (See instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	_____	\$ 3,627,562.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	_____	\$ 1,521,868.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	_____	\$ 121,999.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	_____	\$ 40,914.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	_____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	_____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization WAKE FOREST CHARTER ACADEMY

Employer identification number

90-0942554

Part II Noncash Property (See instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____

Name of organization **WAKE FOREST CHARTER ACADEMY**

Employer identification number

90-0942554

Part III *Exclusively* religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____
 Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____	_____ _____	_____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____	_____ _____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____	_____ _____	_____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____	_____ _____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____	_____ _____	_____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____	_____ _____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____	_____ _____	_____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____	_____ _____

SCHEDULE D (Form 990)

Supplemental Financial Statements

OMB No. 1545-0047

2016

Open to Public Inspection

Department of the Treasury Internal Revenue Service

Complete if the organization answered "Yes" on Form 990, Part IV, line 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.

Name of the organization

Employer identification number

WAKE FOREST CHARTER ACADEMY

90-0942554

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

Complete if the organization answered "Yes" on 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 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?, 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" on Form 990, Part IV, line 7.

Table with 2 columns: Description, Held at the End of the Tax Year. Rows include: 1 Purpose(s) of conservation easements held by the organization (check all that apply), 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., 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?, 6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year, 7 Amount of expenses incurred in monitoring, inspecting, handling of violations, 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)?, 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" on Form 990, Part IV, line 8.

Table with 2 columns: Description, Amount. Rows include: 1a 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., 1b 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.

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule D (Form 990) 2016

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" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a** 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 | 1c |
| d Additions during the year | 1d |
| e Distributions during the year | 1e |
| f Ending balance | 1f |
- 2a** 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 on Part XIII

Part V Endowment Funds.

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a 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 on lines 2a, 2b, and 2c should equal 100%.
- 3a** 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" on line 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" on 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
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment				
e Other				
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) ▶				

Part VII Investments - Other Securities.

Complete if the organization answered "Yes" on 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)		
Total. (Column (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

Part VIII Investments - Program Related.

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

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

Part IX Other Assets.

Complete if the organization answered "Yes" on 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)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	

Part X Other Liabilities.

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) CONTRACTED SERVICE FEE PAYABLE	165,482.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	165,482.

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" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements	1	5,667,709.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	
b	Donated services and use of facilities	2b	191,490.
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	191,490.
3	Subtract line 2e from line 1	3	5,476,219.
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	4a	
b	Other (Describe in Part XIII.)	4b	35,000.
c	Add lines 4a and 4b	4c	35,000.
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)	5	5,511,219.

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

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements	1	5,663,912.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	191,490.
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	191,490.
3	Subtract line 2e from line 1	3	5,472,422.
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	4a	
b	Other (Describe in Part XIII.)	4b	35,000.
c	Add lines 4a and 4b	4c	35,000.
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)	5	5,507,422.

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.

SEE PAGE 5

Part XIII Supplemental Information *(continued)*

SCHEDULE D, PART X, LINE 2:

THE AUDITED FINANCIAL STATEMENTS DO NOT REFERENCE ANY UNCERTAIN INCOME
TAX POSITIONS.

SCHEDULE D, PART XI, LINE 4B

DISCRETIONARY SUPPORT: \$35,000

SCHEDULE D, PART XII, LINE 4B

DISCRETIONARY EXPENSES: \$35,000

**SCHEDULE E
(Form 990 or 990-EZ)**

Department of the Treasury
Internal Revenue Service

Schools

▶ Complete if the organization answered "Yes" on 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

2016

**Open to Public
Inspection**

Name of the organization

WAKE FOREST CHARTER ACADEMY

Employer identification number

90-0942554

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	
SEE SUPPLEMENTAL PAGE		
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.		
6a 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" on 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	

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

Schedule E (Form 990 or 990-EZ) 2016

JSA
6E1273 1.000

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).

SCHEDULE E, PART I, LINE 3:

THE SCHOOL'S RACIALLY NONDISCRIMINATORY POLICY IS DISCLOSED ON ALL STUDENT APPLICATIONS AND PUBLISHED WITH OPEN ENROLLMENT ADVERTISEMENTS IN LOCAL NEWSPAPERS. THE NOTICE OF ITS RACIALLY NONDISCRIMINATORY POLICY IS PUBLISHED ANNUALLY DURING THE PERIOD PRIOR TO THE SCHOOLS SOLICITATION IN LOCAL NEWSPAPERS WHICH ARE AVAILABLE FOR CIRCULATION TO ALL SEGMENTS OF THE COMMUNITY. THE PARTICULARS AS TO COLUMN SIZE, PRINT AND TYPE SPECIFIED BY THE IRS ARE MET OR EXCEEDED.

SCHEDULE E, PART I, LINE 6: EXPLANATION OF GOVERNMENTAL FINANCIAL AID:

THE SCHOOL RECEIVES SUPPORT GRANTS FROM FEDERAL, STATE, AND LOCAL AGENCIES.

SCHEDULE O
(Form 990 or 990-EZ)Department of the Treasury
Internal Revenue Service

Name of the organization

WAKE FOREST CHARTER ACADEMY

Supplemental Information to Form 990 or 990-EZComplete 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.

OMB No. 1545-0047

2016**Open to Public
Inspection**

Employer identification number

90-0942554

FORM 990, PART VI, LINE 3:

THE BOARD OF DIRECTORS OF THE ACADEMY HAS ENTERED INTO A MANAGEMENT AGREEMENT ("THE AGREEMENT") WITH NATIONAL HERITAGE ACADEMIES, INC. ("NHA") FOR THE PROVISION OF ALL EDUCATIONAL, MANAGEMENT AND BUSINESS SERVICES RELATED TO THE OPERATION OF THE ACADEMY. THE AGREEMENT WAS SUBMITTED AND APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION AS PART OF THE CHARTERING PROCESS. PURSUANT TO THE TERMS OF THE AGREEMENT, NHA RECEIVES ALL REVENUE ALLOCATED TO THE ACADEMY AS ITS MANAGEMENT FEE, FROM WHICH IT PROVIDES ITS COMPREHENSIVE EDUCATIONAL MANAGEMENT SERVICES AS SPECIFIED IN THE AGREEMENT AND REQUIRED UNDER THE ACADEMY'S CHARTER (I.E., ALL OF THE OPERATING COSTS OF THE ACADEMY IDENTIFIED IN THE BUDGET APPROVED BY THE ACADEMY'S BOARD). THE FUNCTIONAL EXPENSES REPORTED IN PART IX ARE THE EXPENSES PAID FROM THE FUNDS REMITTED UNDER THE NHA AGREEMENT. IN THE EVENT EXPENSES EXCEED REVENUES, NHA COVERS THE SHORTFALL WITH AN IN-KIND CONTRIBUTION. THIS AGREEMENT HAS BEEN APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION DURING THE ACADEMY'S CHARTER PROCESS AS WELL AS THE INTERNAL REVENUE SERVICE DURING THE ACADEMY'S EXEMPTION APPLICATION PROCESS.

FORM 990, PART VI, LINE 11B:

A DRAFT COPY OF THE FORM 990 WAS PROVIDED TO THE BOARD OF DIRECTORS IN A PACKAGE OF MATERIALS FOR REVIEW AND BOARD APPROVAL WAS OBTAINED PRIOR TO FINALIZATION.

Name of the organization WAKE FOREST CHARTER ACADEMY	Employer identification number 90-0942554
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FORM 990, PART VI, LINE 12C:

THE ACADEMY'S BYLAWS REQUIRE THAT ANY DIRECTOR, OFFICER, KEY EMPLOYEE OR COMMITTEE MEMBER WHO HAS A CONFLICT OF INTEREST MUST PROMPTLY NOTIFY THE BOARD OF THE CONFLICT AND THE CONFLICT WILL BE DULY NOTED IN THE BOARD OF DIRECTOR MEETING MINUTES. THE PERSON WITH THE CONFLICT WILL BE EXCLUDED FROM DECISION MAKING ON THIS ISSUE. THE BOARD MAY TAKE FORMAL, CORRECTIVE AND DISCIPLINARY ACTION IF PROPER DISCLOSURE OF CONFLICTS OF INTEREST ARE NOT MADE.

FORM 990, PART VI, LINE 19:

DOCUMENTS APPROVED BY THE BOARD OF DIRECTORS, INCLUDING THE ACADEMY'S GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICIES AND AUDITED FINANCIAL STATEMENTS ARE AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART IX:

THE ACADEMY'S FUNCTIONAL EXPENSES CONSISTS PRIMARILY OF A MANAGEMENT FEE TO NATIONAL HERITAGE ACADEMIES (NHA) FOR THE COMPREHENSIVE EDUCATIONAL MANAGEMENT SERVICES PROVIDED, IN LINE WITH THE MANAGEMENT AGREEMENT APPROVED AS PART OF THE CHARTERING PROCESS. THE FUNCTIONAL EXPENSES REPORTED IN PART IX ARE THE EXPENSES INCURRED BY NHA ON BEHALF OF THE SCHOOL AND PAID USING THE FUNDS REMITTED BY THE ACADEMY UNDER MANAGEMENT FEE. UNDER THE NHA MANAGEMENT AGREEMENT, NHA PROVIDES THE SCHOOL WITH ALL PERSONNEL REQUIRED (I.E. TEACHERS, SPECIALIZED AIDE, PRINCIPALS, OFFICE STAFF, ETC). THE SALARIES AND WAGES AND RELATED PAYROLL EXPENSES REPORTED IN THE STATEMENT OF FUNCTIONAL EXPENSES IN PART IX REFER TO THE COMPENSATION EXPENSES OF THESE NHA EMPLOYEES WORKING AT THE ACADEMY.

Name of the organization WAKE FOREST CHARTER ACADEMY	Employer identification number 90-0942554
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LIKELIHOOD, ALL EXPENSES REPORTED IN PART IX ARE EXPENSES INCURRED IN THE OPERATION OF THE ACADEMY BY NHA.

ATTACHMENT 1

FORM 990, PART III, LINE 1 - ORGANIZATION'S MISSION

TO OPERATE A PUBLIC CHARTER SCHOOL AND TO PROVIDE EDUCATION TO CHILDREN IN GRADES KINDERGARTEN THROUGH EIGHTH GRADE BASED ON RIGOROUS TEACHING METHODS, PARENTAL INVOLVEMENT, STUDENT RESPONSIBILITY, AND BASIC MORAL VALUES. ENROLLMENT IS OPEN TO ALL APPROPRIATELY AGED CHILDREN WITHOUT REGARD TO GENDER, ETHNIC BACKGROUND, DISABILITY, AND/OR RELIGIOUS AFFILIATION.

ATTACHMENT 2

990, PART VII- COMPENSATION OF THE FIVE HIGHEST PAID IND. CONTRACTORS

<u>NAME AND ADDRESS</u>	<u>DESCRIPTION OF SERVICES</u>	<u>COMPENSATION</u>
NATIONAL HERITAGE ACADEMIES, INC. 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS, MI 49512	MANAGEMENT SERVICES	4,216,417.

Form **990**

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2017

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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.
- ▶ Go to www.irs.gov/Form990 for instructions and the latest information.

A For the **2017** calendar year, or tax year beginning **07/01, 2017**, and ending **06/30, 2018**

B Check if applicable:	<input type="checkbox"/>	Address change	C Name of organization WAKE FOREST CHARTER ACADEMY			D Employer identification number 90-0942554	
	<input type="checkbox"/>	Name change					
	<input type="checkbox"/>	Initial return					
	<input type="checkbox"/>	Final return/terminated					
<input type="checkbox"/>	Amended return	E Telephone number (616) 222-1700			G Gross receipts \$ 6,356,983.		
<input type="checkbox"/>	Application pending						
F Name and address of principal officer: HILDA PARLER 1851 FRIENDSHIP CHAPEL ROAD WAKE FOREST, NC 27587			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 type="checkbox"/> No		
							If "No," attach a list. (see instructions)
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: WWW.NHASCHOOLS.COM		H(c) Group exemption number ▶		
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: 2013			M State of legal domicile: NC				

Part I Summary

Activities & Governance	1	Briefly describe the organization's mission or most significant activities: TO OPERATE A PUBLIC CHARTER SCHOOL WHICH PROVIDES EDUCATION BASED ON RIGOROUS TEACHING METHODS, PARENTAL INVOLVEMENT, STUDENT RESPONSIBILITY, AND BASIC MORAL VALUES.		
	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	7.
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	7.
	5	Total number of individuals employed in calendar year 2017 (Part V, line 2a)	5	0.
	6	Total number of volunteers (estimate if necessary)	6	559.
	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)	5,312,343.	6,149,653.
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	163,876.	172,330.
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	0.	0.
	12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	35,000.	35,000.
			5,511,219.	6,356,983.
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.	0.
	14	Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	2,500,899.	3,024,093.
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶ 0.		
	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	3,006,523.	3,328,677.
18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	5,507,422.	6,352,770.	
19	Revenue less expenses. Subtract line 18 from line 12	3,797.	4,213.	
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	Beginning of Current Year	End of Year
	21	Total liabilities (Part X, line 26)	218,243.	256,214.
	22	Net assets or fund balances. Subtract line 21 from line 20	194,729.	228,487.
		23,514.	27,727.	

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		2/19/2019			
	Signature of officer	Date			
	HILDA PARLER	PRESIDENT			
	Type or print name and title				
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	JACOB COOK		02/06/2019		P01240455
	Firm's name ▶ BDO USA, LLP	Firm's EIN ▶ 13-5381590		Phone no. 616-774-7000	
	Firm's address ▶ 200 OTTAWA AVE NW STE 300 GRAND RAPIDS, MI 49503				

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

For Paperwork Reduction Act Notice, see the separate instructions.

Form **990** (2017)

Form **8868**

(Rev. January 2017)

Department of the Treasury
Internal Revenue Service

Application for Automatic Extension of Time To File an Exempt Organization Return

▶ **File a separate application for each return.**
▶ **Information about Form 8868 and its instructions is at www.irs.gov/form8868.**

OMB No. 1545-1709

Electronic filing (e-file). You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile, click on Charities & Non-Profits, and click on e-file for *Charities and Non-Profits*.

Automatic 6-Month Extension of Time. Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print	Enter filer's identifying number, see instructions	
	Name of exempt organization or other filer, see instructions. WAKE FOREST CHARTER ACADEMY	Employer identification number (EIN) or 90-0942554
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions. 1851 FRIENDSHIP CHAPEL ROAD	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. WAKE FOREST, NC 27587	

Enter the Return Code for the return that this application is for (file a separate application for each return)

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

ANNE SHERMAN

• The books are in the care of ▶ 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS MI 49512

Telephone No. ▶ 616 222-1700 Fax No. ▶ 616 831-6311

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ . If this is for the whole group, check this box . If it is for part of the group, check this box and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 6-month extension of time until 05/15, 2019, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- ▶ calendar year 20____ or
- ▶ tax year beginning 07/01, 2017, and ending 06/30, 2018.

2 If the tax year entered in line 1 is for less than 12 months, check reason: Initial return Final return Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a \$	0.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b \$	0.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c \$	0.

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2017)

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III Yes No

1 Briefly describe the organization's mission:

ATTACHMENT 1

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.

4a (Code:) (Expenses \$ 5,529,584. including grants of \$) (Revenue \$ 114,605.)

OPERATED AN EDUCATIONAL INSTITUTION ORGANIZED AS A PUBLIC SCHOOL ACADEMY. THE ACADEMY PROVIDES EDUCATION, AT NO COST TO THE PARENT, TO STUDENTS IN KINDERGARTEN THROUGH EIGHTH GRADE. THE ACADEMY OPERATES UNDER A CHARTER APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION.

4b (Code:) (Expenses \$ 158,864. including grants of \$) (Revenue \$ 57,725.)

OPERATED A SCHOOL FOOD SERVICE PROGRAM AT THE PUBLIC SCHOOL ACADEMY DESCRIBED ABOVE. THE ACADEMY OFFERS FREE OR REDUCED LUNCH FOR FAMILIES THAT QUALIFY. FUNDING FOR THIS PROGRAM WAS PROVIDED BY THE USDA FOOD AND NUTRITION SERVICE IN THE AMOUNT OF \$38,083.

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

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

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

4e Total program service expenses ▶ 5,688,448.

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</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? <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>		
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

Table with columns for line numbers (1a-14b), descriptions of tax compliance items, and Yes/No response columns. Includes items like backup withholding rules, employee reporting, foreign accounts, 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

Section A. Governing Body and Management

		Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year 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.		
1b	Enter the number of voting members included in line 1a, above, who are independent		
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
7a	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
7b	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:		
8a	a The governing body?	X	
8b	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
10a		X
10b		
11a	X	
11b		
12a	X	
12b	X	
12c	X	
13		X
14	X	
15a		X
15b		X
16a		X
16b		

Section C. Disclosure

- 17** List the states with which a copy of this Form 990 is required to be filed ► NONE
- 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: ►

COREY BALKON 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS, MI 49503 616-222-1700

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

1a 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) HILDA PARLER PRESIDENT	1.00 0.	X		X				0.	0.	0.
(2) MARILYN BONNETT VICE PRESIDENT	1.00 0.	X		X				0.	0.	0.
(3) SALINA GARY SECRETARY	1.00 0.	X		X				0.	0.	0.
(4) MARK MARLEY TREASURER	1.00 0.	X		X				0.	0.	0.
(5) SCOTT DABAL DIRECTOR	1.00 0.	X						0.	0.	0.
(6) NICK GORNEAULT DIRECTOR	1.00 0.	X						0.	0.	0.
(7) VIVIANNE VALDES-HURTADO DIRECTOR	1.00 0.	X						0.	0.	0.
(8)										
(9)										
(10)										
(11)										
(12)										
(13)										
(14)										

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	1a Federated campaigns	1a						
	b Membership dues	1b						
	c Fundraising events	1c						
	d Related organizations	1d						
	e Government grants (contributions)	1e	6,149,653.					
	f All other contributions, gifts, grants, and similar amounts not included above	1f						
	g Noncash contributions included in lines 1a-1f: \$							
	h Total. Add lines 1a-1f ▶			6,149,653.				
	Program Service Revenue	2a FOOD SERVICE REVENUE	Business Code	611600	57,725.	57,725.		
b MISCELLANEOUS ACTIVITY FEES			900099	114,605.	114,605.			
c _____								
d _____								
e _____								
f All other program service revenue								
g Total. Add lines 2a-2f ▶				172,330.				
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts). ▶			0.				
	4 Income from investment of tax-exempt bond proceeds ▶			0.				
	5 Royalties ▶			0.				
	6a Gross rents	(i) Real	(ii) Personal					
		b Less: rental expenses						
	c Rental income or (loss)							
	d Net rental income or (loss) ▶			0.				
	7a 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) ▶			0.				
	8a 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 ▶			0.			
9a Gross income from gaming activities. See Part IV, line 19 a								
	b Less: direct expenses b							
	c Net income or (loss) from gaming activities ▶			0.				
10a 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 ▶			0.				
Miscellaneous Revenue			Business Code					
11a DISCRETIONARY SUPPORT		611710	35,000.			35,000.		
b _____								
c _____								
d All other revenue								
e Total. Add lines 11a-11d ▶			35,000.					
12 Total revenue. See instructions. ▶			6,356,983.	172,330.		35,000.		

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 X

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	0.			
2 Grants and other assistance to domestic individuals. See Part IV, line 22	0.			
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16	0.			
4 Benefits paid to or for members	0.			
5 Compensation of current officers, directors, trustees, and key employees	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)	0.			
7 Other salaries and wages	2,301,726.	2,301,726.		
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	47,890.	47,890.		
9 Other employee benefits	498,376.	498,376.		
10 Payroll taxes	176,101.	176,101.		
11 Fees for services (non-employees):				
a Management	0.			
b Legal	0.			
c Accounting	84,225.	9,125.	75,100.	
d Lobbying	0.			
e Professional fundraising services. See Part IV, line 17.	0.			
f Investment management fees	0.			
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)	386,832.	386,832.		
12 Advertising and promotion	28,574.		28,574.	
13 Office expenses	259,292.	259,292.		
14 Information technology	105,342.	8,029.	97,313.	
15 Royalties	0.			
16 Occupancy	1,664,110.	1,659,012.	5,098.	
17 Travel	7,055.	7,055.		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	0.			
19 Conferences, conventions, and meetings	71,621.	71,621.		
20 Interest	0.			
21 Payments to affiliates	0.			
22 Depreciation, depletion, and amortization	0.			
23 Insurance	20,891.	20,891.		
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 FOOD SERVICE	158,864.	158,864.		
b INSTRUCTIONAL SUPPORT	126,754.		126,754.	
c HUMAN RESOURCES	124,051.		124,051.	
d DISCRETIONARY EXPENSES	61,810.		61,810.	
e All other expenses	229,256.	83,634.	145,622.	
25 Total functional expenses. Add lines 1 through 24e	6,352,770.	5,688,448.	664,322.	
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)	0.			

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	174,707.	1	92,944.
	2 Savings and temporary cash investments	0.	2	0.
	3 Pledges and grants receivable, net	39,971.	3	159,320.
	4 Accounts receivable, net	0.	4	0.
	5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L	0.	5	0.
	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	0.	6	0.
	7 Notes and loans receivable, net	0.	7	0.
	8 Inventories for sale or use	0.	8	0.
	9 Prepaid expenses and deferred charges	3,565.	9	3,950.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a		
	b Less: accumulated depreciation	10b	0.	10c 0.
	11 Investments - publicly traded securities	0.	11	0.
	12 Investments - other securities. See Part IV, line 11	0.	12	0.
	13 Investments - program-related. See Part IV, line 11	0.	13	0.
	14 Intangible assets	0.	14	0.
	15 Other assets. See Part IV, line 11	0.	15	0.
16 Total assets. Add lines 1 through 15 (must equal line 34)	218,243.	16	256,214.	
Liabilities	17 Accounts payable and accrued expenses	0.	17	0.
	18 Grants payable	0.	18	0.
	19 Deferred revenue	29,247.	19	38,847.
	20 Tax-exempt bond liabilities	0.	20	0.
	21 Escrow or custodial account liability. Complete Part IV of Schedule D	0.	21	0.
	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	0.	22	0.
	23 Secured mortgages and notes payable to unrelated third parties	0.	23	0.
	24 Unsecured notes and loans payable to unrelated third parties	0.	24	0.
	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	165,482.	25	189,640.
	26 Total liabilities. Add lines 17 through 25	194,729.	26	228,487.
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	23,514.	27	27,727.
	28 Temporarily restricted net assets	0.	28	0.
	29 Permanently restricted net assets	0.	29	0.
	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	23,514.	33	27,727.
	34 Total liabilities and net assets/fund balances	218,243.	34	256,214.

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	6,356,983.
2	Total expenses (must equal Part IX, column (A), line 25)	2	6,352,770.
3	Revenue less expenses. Subtract line 2 from line 1	3	4,213.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	23,514.
5	Net unrealized gains (losses) on investments	5	0.
6	Donated services and use of facilities	6	0.
7	Investment expenses	7	0.
8	Prior period adjustments	8	0.
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	27,727.

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.		
2a	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
2b	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	
2c	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	
3a	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
3b	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.		

SCHEDULE A
(Form 990 or 990-EZ)

Public Charity Status and Public Support

OMB No. 1545-0047

2017

Open to Public Inspection

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.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

Name of the organization

WAKE FOREST CHARTER ACADEMY

Employer identification number

90-0942554

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 12, 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 agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
- 10 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.)
- 11 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12 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 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
 - 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 1-10 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						

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

Schedule A (Form 990 or 990-EZ) 2017

JSA
7E1210 1.000

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

Table with 7 columns: (a) 2013, (b) 2014, (c) 2015, (d) 2016, (e) 2017, (f) Total. Rows include: 1 Gifts, grants, contributions, and membership fees received; 2 Tax revenues levied for the organization's benefit; 3 The value of services or facilities furnished by a governmental unit; 4 Total. Add lines 1 through 3; 5 The portion of total contributions by each person; 6 Public support. Subtract line 5 from line 4.

Section B. Total Support

Table with 7 columns: (a) 2013, (b) 2014, (c) 2015, (d) 2016, (e) 2017, (f) Total. Rows include: 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; 10 Other income. Do not include gain or loss from the sale of capital assets; 11 Total support. Add lines 7 through 10; 12 Gross receipts from related activities, etc. (see instructions); 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

Table with 3 columns: Line number, Description, and Percentage. Rows include: 14 Public support percentage for 2017; 15 Public support percentage from 2016 Schedule A, Part II, line 14; 16a 33 1/3% support test - 2017; 16b 33 1/3% support test - 2016; 17a 10%-facts-and-circumstances test - 2017; 17b 10%-facts-and-circumstances test - 2016; 18 Private foundation.

Part III Support Schedule for Organizations Described in Section 509(a)(2)
 (Complete only if you checked the box on line 10 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) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(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) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(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**

Section C. Computation of Public Support Percentage

15 Public support percentage for 2017 (line 8, column (f) divided by line 13, column (f)).	15	%
16 Public support percentage from 2016 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2017 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2016 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2017. 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 - 2016. 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 in line 12 on Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d 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? <i>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.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i>		
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)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>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.</i>		
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)? <i>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.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>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).</i>		
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 (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
9a 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))? <i>If "Yes," provide detail in Part VI.</i>		
b Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

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?	11 a	
b A family member of a person described in (a) above?	11 b	
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>	11 c	

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, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) 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

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
c <input type="checkbox"/> 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.		Yes	No
a 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? <i>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.</i>	2a		
b 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? <i>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.</i>	2b		
3 Parent of Supported Organizations. Answer (a) and (b) below.			
a 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? <i>Provide details in Part VI.</i>	3a		
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>	3b		

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 Nov. 20, 1970 (explain in Part VI). **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	1a		
b Average monthly cash balances	1b		
c Fair market value of other non-exempt-use assets	1c		
d Total (add lines 1a, 1b, and 1c)	1d		
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).

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 2017 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-2017	(iii) Distributable Amount for 2017
1 Distributable amount for 2017 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2017 (reasonable cause required-explain in Part VI). See instructions.			
3 Excess distributions carryover, if any, to 2017			
a			
b From 2013			
c From 2014			
d From 2015			
e From 2016			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2017 distributable amount			
i Carryover from 2012 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2017 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2017 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4.			
5 Remaining underdistributions for years prior to 2017, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.			
6 Remaining underdistributions for 2017. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.			
7 Excess distributions carryover to 2018. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2013			
b Excess from 2014			
c Excess from 2015			
d Excess from 2016			
e Excess from 2017			

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

Schedule B
 (Form 990, 990-EZ,
 or 990-PF)
 Department of the Treasury
 Internal Revenue Service

Schedule of Contributors

OMB No. 1545-0047

2017

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**
 ▶ **Go to www.irs.gov/Form990 for the latest information.**

Name of the organization WAKE FOREST CHARTER ACADEMY	Employer identification number 90-0942554
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Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)(3) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization WAKE FOREST CHARTER ACADEMY	Employer identification number 90-0942554
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Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	_____	\$ 4,196,508.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	_____	\$ 1,767,083.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	_____	\$ 147,979.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	_____	\$ 38,083.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization WAKE FOREST CHARTER ACADEMY

Employer identification number

90-0942554

Part II Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____

Name of organization **WAKE FOREST CHARTER ACADEMY**

Employer identification number
90-0942554

Part III *Exclusively* religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____	_____ _____	_____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____	_____ _____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____	_____ _____	_____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____	_____ _____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____	_____ _____	_____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____	_____ _____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____ _____	_____ _____	_____ _____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____ _____	_____ _____

SCHEDULE D (Form 990)

Supplemental Financial Statements

OMB No. 1545-0047

2017

Open to Public Inspection

Department of the Treasury Internal Revenue Service

Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

Name of the organization

WAKE FOREST CHARTER ACADEMY

Employer identification number

90-0942554

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

Complete if the organization answered "Yes" on 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 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?, 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" on Form 990, Part IV, line 7.

Table with 2 columns: Held at the End of the Tax Year. Rows include: 1 Purpose(s) of conservation easements held by the organization (check all that apply), 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, 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?, 6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year, 7 Amount of expenses incurred in monitoring, inspecting, handling of violations, 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)?, 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" on Form 990, Part IV, line 8.

Table with 2 columns: Revenue, Assets. Rows include: 1a 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. 1b 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 on 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 on Form 990, Part VIII, line 1. b Assets included in Form 990, Part X.

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule D (Form 990) 2017

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" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a** 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 | 1c |
| d Additions during the year | 1d |
| e Distributions during the year | 1e |
| f Ending balance | 1f |
- 2a** 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 on Part XIII

Part V Endowment Funds.

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a 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 on lines 2a, 2b, and 2c should equal 100%.
- 3a** 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" on line 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" on 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
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment				
e Other				
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) ▶				

Part VII Investments - Other Securities.
Complete if the organization answered "Yes" on 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)		
Total. (Column (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

Part VIII Investments - Program Related.
Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

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

Part IX Other Assets.
Complete if the organization answered "Yes" on 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)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	

Part X Other Liabilities.
Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) CONTRACTED SERVICE FEE PAYABLE	189,640.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	189,640.

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 XIII Supplemental Information (continued)

SCHEDULE D, PART X, LINE 2:

THE AUDITED FINANCIAL STATEMENTS DO NOT REFERENCE ANY UNCERTAIN INCOME
TAX POSITIONS.

SCHEDULE D, PART XI, LINE 2D

FEDERAL SOURCES PASSED TO SUBRECIPIENTS: \$7,865

SCHEDULE D, PART XI, LINE 4B

DISCRETIONARY SUPPORT: \$35,000

SCHEDULE D, PART XII, LINE 2D

FEDERAL SOURCES PASSED TO SUBRECIPIENTS: \$7,865

SCHEDULE D, PART XII, LINE 4B

DISCRETIONARY EXPENSES: \$35,000

**SCHEDULE E
(Form 990 or 990-EZ)**

Schools

OMB No. 1545-0047

2017

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

- ▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.
- ▶ Attach to Form 990 or Form 990-EZ.
- ▶ Go to www.irs.gov/Form990 for the latest information.

Name of the organization
WAKE FOREST CHARTER ACADEMY

Employer identification number
90-0942554

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	
SEE SUPPLEMENTAL PAGE		
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.		
6a 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" on 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	

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

Schedule E (Form 990 or 990-EZ) 2017

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).

SCHEDULE E, PART I, LINE 3:

THE SCHOOL'S RACIALLY NONDISCRIMINATORY POLICY IS DISCLOSED ON ALL STUDENT APPLICATIONS AND PUBLISHED WITH OPEN ENROLLMENT ADVERTISEMENTS IN LOCAL NEWSPAPERS. THE NOTICE OF ITS RACIALLY NONDISCRIMINATORY POLICY IS PUBLISHED ANNUALLY DURING THE PERIOD PRIOR TO THE SCHOOLS SOLICITATION IN LOCAL NEWSPAPERS WHICH ARE AVAILABLE FOR CIRCULATION TO ALL SEGMENTS OF THE COMMUNITY. THE PARTICULARS AS TO COLUMN SIZE, PRINT AND TYPE SPECIFIED BY THE IRS ARE MET OR EXCEEDED.

SCHEDULE E, PART I, LINE 6: EXPLANATION OF GOVERNMENTAL FINANCIAL AID:

THE SCHOOL RECEIVES SUPPORT GRANTS FROM FEDERAL, STATE, AND LOCAL AGENCIES.

SCHEDULE O
(Form 990 or 990-EZ)Department of the Treasury
Internal Revenue Service

Name of the organization

WAKE FOREST CHARTER ACADEMY

Supplemental Information to Form 990 or 990-EZComplete 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.

OMB No. 1545-0047

2017**Open to Public
Inspection**

Employer identification number

90-0942554

FORM 990, PART VI, LINE 3:

THE BOARD OF DIRECTORS OF THE ACADEMY HAS ENTERED INTO A MANAGEMENT AGREEMENT ("THE AGREEMENT") WITH NATIONAL HERITAGE ACADEMIES, INC. ("NHA") FOR THE PROVISION OF ALL EDUCATIONAL, MANAGEMENT AND BUSINESS SERVICES RELATED TO THE OPERATION OF THE ACADEMY. THE AGREEMENT WAS SUBMITTED AND APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION AS PART OF THE CHARTERING PROCESS. PURSUANT TO THE TERMS OF THE AGREEMENT, NHA RECEIVES ALL REVENUE ALLOCATED TO THE ACADEMY AS ITS MANAGEMENT FEE, FROM WHICH IT PROVIDES ITS COMPREHENSIVE EDUCATIONAL MANAGEMENT SERVICES AS SPECIFIED IN THE AGREEMENT AND REQUIRED UNDER THE ACADEMY'S CHARTER (I.E., ALL OF THE OPERATING COSTS OF THE ACADEMY IDENTIFIED IN THE BUDGET APPROVED BY THE ACADEMY'S BOARD). THE FUNCTIONAL EXPENSES REPORTED IN PART IX ARE THE EXPENSES PAID FROM THE FUNDS REMITTED UNDER THE NHA AGREEMENT. IN THE EVENT EXPENSES EXCEED REVENUES, NHA COVERS THE SHORTFALL WITH AN IN-KIND CONTRIBUTION. THIS AGREEMENT HAS BEEN APPROVED BY THE NORTH CAROLINA STATE BOARD OF EDUCATION DURING THE ACADEMY'S CHARTER PROCESS AS WELL AS THE INTERNAL REVENUE SERVICE DURING THE ACADEMY'S EXEMPTION APPLICATION PROCESS.

FORM 990, PART VI, LINE 11B:

A DRAFT COPY OF THE FORM 990 WAS PROVIDED TO THE BOARD OF DIRECTORS IN A PACKAGE OF MATERIALS FOR REVIEW AND BOARD APPROVAL WAS OBTAINED PRIOR TO FINALIZATION.

Name of the organization WAKE FOREST CHARTER ACADEMY	Employer identification number 90-0942554
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FORM 990, PART VI, LINE 12C:

THE ACADEMY'S BYLAWS REQUIRE THAT ANY DIRECTOR, OFFICER, KEY EMPLOYEE OR COMMITTEE MEMBER WHO HAS A CONFLICT OF INTEREST MUST PROMPTLY NOTIFY THE BOARD OF THE CONFLICT AND THE CONFLICT WILL BE DULY NOTED IN THE BOARD OF DIRECTOR MEETING MINUTES. THE PERSON WITH THE CONFLICT WILL BE EXCLUDED FROM DECISION MAKING ON THIS ISSUE. THE BOARD MAY TAKE FORMAL, CORRECTIVE AND DISCIPLINARY ACTION IF PROPER DISCLOSURE OF CONFLICTS OF INTEREST ARE NOT MADE.

FORM 990, PART VI, LINE 19:

DOCUMENTS APPROVED BY THE BOARD OF DIRECTORS, INCLUDING THE ACADEMY'S GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICIES AND AUDITED FINANCIAL STATEMENTS ARE AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART IX:

THE ACADEMY'S FUNCTIONAL EXPENSES CONSISTS PRIMARILY OF A MANAGEMENT FEE TO NATIONAL HERITAGE ACADEMIES (NHA) FOR THE COMPREHENSIVE EDUCATIONAL MANAGEMENT SERVICES PROVIDED, IN LINE WITH THE MANAGEMENT AGREEMENT APPROVED AS PART OF THE CHARTERING PROCESS. THE FUNCTIONAL EXPENSES REPORTED IN PART IX ARE THE EXPENSES INCURRED BY NHA ON BEHALF OF THE SCHOOL AND PAID USING THE FUNDS REMITTED BY THE ACADEMY UNDER MANAGEMENT FEE. UNDER THE NHA MANAGEMENT AGREEMENT, NHA PROVIDES THE SCHOOL WITH ALL PERSONNEL REQUIRED (I.E. TEACHERS, SPECIALIZED AIDE, PRINCIPALS, OFFICE STAFF, ETC). THE SALARIES AND WAGES AND RELATED PAYROLL EXPENSES REPORTED IN THE STATEMENT OF FUNCTIONAL EXPENSES IN PART IX REFER TO THE COMPENSATION EXPENSES OF THESE NHA EMPLOYEES WORKING AT THE ACADEMY.

Name of the organization WAKE FOREST CHARTER ACADEMY	Employer identification number 90-0942554
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LIKewise, ALL EXPENSES REPORTED IN PART IX ARE EXPENSES INCURRED IN THE OPERATION OF THE ACADEMY BY NHA.

ATTACHMENT 1

FORM 990, PART III, LINE 1 - ORGANIZATION'S MISSION

TO OPERATE A PUBLIC CHARTER SCHOOL AND TO PROVIDE EDUCATION TO CHILDREN IN GRADES KINDERGARTEN THROUGH EIGHTH GRADE BASED ON RIGOROUS TEACHING METHODS, PARENTAL INVOLVEMENT, STUDENT RESPONSIBILITY, AND BASIC MORAL VALUES. ENROLLMENT IS OPEN TO ALL APPROPRIATELY AGED CHILDREN WITHOUT REGARD TO GENDER, ETHNIC BACKGROUND, DISABILITY, AND/OR RELIGIOUS AFFILIATION.

ATTACHMENT 2

990, PART VII- COMPENSATION OF THE FIVE HIGHEST PAID IND. CONTRACTORS

<u>NAME AND ADDRESS</u>	<u>DESCRIPTION OF SERVICES</u>	<u>COMPENSATION</u>
NATIONAL HERITAGE ACADEMIES, INC. 3850 BROADMOOR SE, SUITE 201 GRAND RAPIDS, MI 49503	MANAGEMENT SERVICES	5,062,183.



Appendix A4.1: Executed CMO/EMO Contract

Oak Grove Charter Academy

SERVICES AGREEMENT

THIS SERVICES AGREEMENT (“**Agreement**”) by and between National Heritage Academies, Inc., a Michigan corporation (“**NHA**”), and Oak Grove Charter Academy, a North Carolina non-profit corporation (the “**School**”) is executed as of the 14th day of August 2019 and shall become effective as of the Effective Date (as defined in Article II(A) below). For purposes of this Agreement, NHA and the School shall be referred to collectively as the “**Parties**.”

RECITALS

WHEREAS, the School is applying for a Charter from the North Carolina State Board of Education (the “**Authorizer**”) to operate a public charter school pursuant to N.C. Gen. Stat. § 115C-218 *et seq.* (the “**Authorizing Law**”); and

WHEREAS, the Parties desire to work together to promote educational excellence and innovation based on NHA’s school design, comprehensive educational program and management principles; and

WHEREAS, the Parties desire to set forth the terms and conditions of such a relationship in this Agreement;

NOW, THEREFORE, for good and valuable consideration, including the mutual promise and benefits contained in this Agreement, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

ARTICLE I

CONTRACTING RELATIONSHIP

A. Services. Subject to the terms and conditions of this Agreement, and as permitted by applicable law, the School hereby contracts with NHA for the provision during the Term of certain educational, business administration, facility, and management services, including without limitation, all labor, equipment, and materials necessary for the provision of the same, as set forth herein (collectively, the “**Services**”).

B. Charter. This Agreement shall: (i) be subject to and comply with the terms and conditions of the Charter and the School’s Charter Application (collectively, the “**Charter**”); and (ii) not be construed to interfere with the constitutional, statutory, or fiduciary duties of the School’s Board of Directors (the “**Board**”). In the event of a conflict between any term or condition of this Agreement and any term or condition of the Charter, the term or condition of the Charter shall govern.

C. Independent Contractor. NHA shall provide the Services as an independent contractor, and not as an employee, partner, agent, or associate of the School. This independent contractor relationship shall extend to the officers, directors, employees, and representatives of NHA. Consistent with the status of an independent contractor, NHA reserves to itself the right to

designate the means and methods of accomplishing the objectives and purposes of this Agreement consistent with Authorizing Law and the Charter. The relationship between the Parties is based solely on the terms and conditions of this Agreement, and the terms and conditions of any other written agreement between the Parties.

D. Designations and Appointments.

1. NHA, including its directors, officers, and employees are hereby designated as “other School Officials having a legitimate educational interest in education records” for purposes of the Family Educational Right and Privacy Act, 20 U.S.C. §1232g *et seq.* (FERPA).

2. NHA, its directors, officers, and employees may be designated by the School for other purposes by a written resolution of the Board.

ARTICLE II

TERM & TERMINATION

A. Effective Date; Term. This term of this Agreement shall commence on the Effective Date, and unless terminated as set forth herein, shall continue until the termination or expiration of the Charter currently in effect, inclusive of any Charter reauthorization or renewal periods thereof (the “**Term**”). “Effective Date” means the date that the Authorizer approves and issues a fully executed Charter to the School under the policies of the Authorizer and applicable North Carolina law. The parties have executed this Agreement in anticipation that it will automatically spring into existence and become effective on the Effective Date without any further action required from either party. For clarity, the parties shall have no rights, or any obligations to one another whatsoever, under this Agreement unless and until the Effective Date. In the event that the School fails to have a Charter issued by the Authorizer for any reason, this Agreement will automatically terminate without any rights or obligations of either party under this Agreement having ever come into effect. The parties acknowledge that the Authorizer, as part of any reauthorization or renewal, may require that the School and NHA submit an amended or restated Agreement for review by the Authorizer. Assuming that the Effective Date comes to pass, and the Term of this Agreement commences, the first school year under the Term of this Agreement shall commence July 1, 201_ to June 30, 201_, and each school year during the Term thereafter shall commence on July 1 and end on June 30 of the following year.

B. Termination.

1. By NHA. NHA may terminate this Agreement prior to the end of the Term if the Board fails to remedy a material breach of this Agreement within thirty (30) days after receiving a notice from NHA of such breach. For purposes of this Subsection, a material breach (which for the sake of clarity is a default hereunder) includes, but is not limited to: (i) NHA’s failure to timely receive any compensation or reimbursement required by this Agreement; or (ii) a suspension, revocation, or non-renewal of the Charter.

2. By the School. The School may terminate this Agreement prior to the end of the Term if NHA fails to remedy a material breach of this Agreement within (30) days after receiving notice from the School of such breach. For purposes of this Subsection, a material breach (which for the sake of clarity is a default hereunder) includes, but is not limited to: (i) NHA's failure to account for expenditures or pay operating costs pursuant to the Budget (as defined below); (ii) NHA's failure to follow policies, procedures, rules, regulations or curriculum adopted by the Board, provided they do not violate the Charter, applicable law, or this Agreement; (iii) a receipt by the Board of an unsatisfactory report from NHA or an independent education consultant retained by the Board regarding the Services or the School's performance, provided the unsatisfactory performance cannot be adequately corrected or explained; (iv) a determination that this Agreement or its implementation would serve as grounds for suspension, revocation, or non-renewal of the Charter; (v) a determination that this Agreement or its implementation would jeopardize material tax exemptions of the School or its non-profit status; or (vi) any action or inaction by NHA that places the Charter in jeopardy of termination, suspension or revocation.

3. By Either Party. Either party may terminate this Agreement prior to the end of the Term, with or without cause, by providing the other party with at least ninety (90) days' prior written notice.

4. If this Agreement is terminated prior to the end of the Term, and unless otherwise agreed by the Parties, such termination will not become effective until the end of the then-current school year.

C. Effect of Termination. Upon the effective date of termination or expiration of this Agreement:

1. NHA shall have the right to remove from the School any equipment or other assets owned or leased by NHA;

2. The School shall pay or reimburse NHA through the Fee (as defined below) for the prepaid portion of any expenses or liabilities incurred by NHA pursuant to the Budget as of the date of such termination or expiration, provided NHA supplies the School with documentation of all such expenses and liabilities;

3. NHA may agree, in its sole discretion, to assist the School for a reasonable amount of time, not to exceed ninety (90) days, and for a reasonable fee, with the School's transition to another administrative, managerial, or services arrangement;

4. NHA shall, if applicable, reasonably assist the School in the execution of a closure and dissolution plan and cooperate in the closure and dissolution process, including without limitation, in any audits and court or other proceedings related thereto; and

5. The party to whom Confidential Information (as defined below) has been disclosed shall, upon request and at the direction of the disclosing party: (i) return such Confidential Information within thirty (30) days, including any copies thereof, and cease its use; or (ii) destroy such Confidential Information and certify such destruction to the disclosing party,

except for a single copy thereof which may be retained for the sole purpose of determining the scope of any obligations incurred under this Agreement, and except where disclosure or retention is required by applicable law.

ARTICLE III

OBLIGATIONS OF NHA

A. Manager at Risk. NHA shall be responsible and accountable to the Board for providing the Services during the Term. During the Term, NHA shall provide the Services regardless of whether actual revenue meets the level projected in the Budget, and NHA hereby assumes the risk of funding shortfalls during the Term. Notwithstanding the foregoing, NHA shall not be required to expend funds on Services in excess of the amount set forth in the Budget.

B. Comprehensive Educational Program. The School has determined to adopt NHA's proprietary educational and academic programs and goals, as set forth in the Charter (the "**Educational Program**"). Subject to the oversight of the Board, during the Term NHA shall implement and administer the Educational Program. In the event that NHA reasonably determines that it is necessary or advisable to make material changes to the Educational Program, NHA shall inform the Board of the proposed changes and obtain the Board's approval before making such changes, as well as the Authorizer's approval if required by the Charter or applicable law. The Parties acknowledge and agree that an essential principle of the Educational Program is its flexibility, adaptability and capacity to change in the interest of continuous improvement and efficiency. Not less than annually or as reasonably requested by the Board during the Term, NHA shall provide the Board with a report detailing progress made on each of the educational goals set forth in the Educational Program. The school year calendar and the school day schedule shall be approved by the Board as required under the Charter.

C. All Children Welcome. NHA places a high value on diversity, and the School shall welcome students of all races, ethnicity, religion, gender and economic backgrounds.

D. Services to Students with Disabilities. NHA welcomes students with disabilities at the School. NHA shall provide special education and related services, in conformity with the requirements of applicable law, to students who attend the School.

E. Educational and Administrative Services. Subject to the oversight of the Board, during the Term, NHA shall implement operational practices and procedures that are consistent with Board policy, the Charter and applicable law. Such practices and procedures shall include, but are not limited to:

1. Student recruitment and student admissions.
2. Student assessments, including testing, promotion, and retention.

3. The acquisition of instructional materials, equipment and supplies, and the administration of any and all extra-curricular and co-curricular activities and programs included in the Budget.

4. Employment of personnel working at the School and management of all personnel functions, as set forth herein.

5. All aspects of the School's business administration.

6. All aspects of the School's accounting operation, including general ledger management, financial reporting, payroll, employee benefits and payroll tax compliance.

7. All aspects of food services.

8. All aspects of facilities administration and maintenance.

9. Student behavior management and discipline.

F. Location of Services. Other than instruction, and unless prohibited by the Charter or applicable law, NHA may provide the Services, including but not limited to, purchasing, professional development and administrative services, off-site.

G. Subcontracts. NHA reserves the right to subcontract any and all aspects of the Services. NHA shall not subcontract the oversight of the Educational Program, except as specifically permitted in this Agreement or with prior written approval of the Board. Notwithstanding the foregoing, the Board specifically acknowledges and agrees that from time to time NHA may use third parties or independent contractors to assist in the creation and development of Educational Materials (as defined below) that may be used as a part of the Educational Program.

H. Pupil Performance Standards and Evaluation. NHA shall implement pupil performance evaluations that permit evaluation of the academic progress of each School student. NHA shall utilize assessment strategies required by the Charter and applicable law. The Board and NHA shall cooperate in good faith to identify academic goals and methods to assess such academic performance. NHA shall provide the Board with timely reports regarding student performance.

I. Unusual Events. NHA shall timely notify the Board and the Administrator (as defined below) during the Term of any anticipated or known material: (i) health or safety issues, including all mandatory reporting required by applicable law; (ii) labor, employee or funding issues; or (iii) other issues that may reasonably and adversely impact the School's ability to comply with the Charter, applicable law or this Agreement.

J. School Records. The financial and education records pertaining to the School (collectively, the "**School Records**"), are property of the School. Except as may be prohibited or limited by the Charter or applicable law, the School Records shall be available to the Board and the Authorizer for their review, and are subject to inspection and copying to the same extent that records of public schools are subject to inspection and copying pursuant to applicable law. All

School Records shall be physically or electronically available upon request at the School's physical facility. NHA agrees to comply with the terms of the Charter regarding information to be made available to the School.

K. Facility. NHA shall use reasonable efforts to secure a facility to be leased or otherwise provided to the School on terms mutually agreeable to NHA and the Board. Obligations of the Board created under the terms of such lease are to be fulfilled by NHA unless otherwise agreed to in writing by NHA and the Board. The facility shall comply with the requirements of the Charter and applicable law. NHA shall also use reasonable efforts to cause the facility to be furnished with equipment and technology as is reasonably necessary to implement the Educational Program.

L. Legal Compliance. NHA will implement and enforce rules, regulations and procedures applicable to the School that are consistent with adopted Board policy, if any, and the Educational Program in accordance with the Charter and applicable law, including without limitation, rules, regulations, and policies regarding non-discrimination, discipline, special education, confidentiality and access to records.

M. Rules and Procedures. NHA will recommend to the Board reasonable rules, regulations, policies and/or procedures applicable to the School. The Board hereby authorizes and directs NHA to enforce such rules, regulations and procedures consistent with Board policy.

N. Assistance to the Board. NHA shall cooperate with the Board and, to the extent consistent with applicable law, timely furnish the Board with all documents and information necessary for the Board to properly perform its responsibilities under this Agreement.

ARTICLE IV

OBLIGATIONS OF THE BOARD

A. Board Policies. The Board shall be responsible for the fiscal and academic policies of the School. The Board shall exercise good faith in considering the recommendations of NHA, including but not limited to, NHA's recommendations regarding policies, rules, regulations and the Budget (as defined below).

B. Assistance to NHA. The Board shall cooperate with NHA and, to the extent consistent with applicable law, timely furnish NHA all documents and information necessary for NHA to properly perform its responsibilities under this Agreement during the Term.

C. Unusual Events. The Board shall timely notify NHA, during the Term, of any anticipated or known material: (i) health or safety issues; (ii) labor, employee or funding issues; or (iii) other issues that may reasonably and adversely impact NHA's ability to comply with the Charter, applicable law, or this Agreement.

D. Office Space. The Board shall provide NHA with suitable office space at the School, provided the requested space is: (i) available and can be provided without materially

prejudicing the Educational Program; and (ii) used only for activities related to the School. The space shall be provided at no cost to NHA.

E. Retained Authority. The Board shall retain the authority to adopt reasonable policies in accordance with applicable law relative to anything necessary for the proper establishment, maintenance, management, and operation of the School.

ARTICLE V

INTELLECTUAL PROPERTY

A. Definitions.

1. **“Educational Materials”** means all curriculum, print and electronic textbooks, instructional materials, lesson plans, teacher guides, workbooks, tests, and other curriculum-related materials licensed, developed or otherwise owned by the School or NHA.

2. **“Confidential Information”** means any confidential and non-public trade, technical or business knowledge, information and materials regarding the School or NHA (or their respective affiliates), which is given by one party to the other, or any of their respective representatives, in any form, whether printed, written, oral, visual, electronic or in any other media or manner. Confidential Information includes, but is not limited to, research, operations and procedures, financial projections, pricing, sales, expansion plans and strategies, services data, trade secrets and other intellectual property, or the results of any mediation or private adjudication, as well as information with respect to each party’s or its affiliates’ plans for market expansion, except for information which a party can show by contemporaneous written records was developed or formulated independently of work or services performed for, or in connection with performance of, this Agreement. Notwithstanding the foregoing, the disclosure of the other party’s Confidential Information as required to be disclosed by law, rule or regulation or by reason of subpoena, court order or government action shall not constitute a breach of this Agreement; however, in such event the party required to disclose such information will reasonably cooperate with the party whose information is required to be disclosed in order to obtain a protective order applicable to such disclosure. All Confidential Information will remain the sole property of the party disclosing such information or data.

B. School Materials. The School shall own all right, title and interest in and to Educational Materials that are: (i) licensed or owned by the School as of the Effective Date; or (ii) licensed, developed, characterized, conceived, derived, generated, identified, or otherwise made by the School during the Term, provided such materials do not reference the NHA Materials (as defined below), or incorporate any Confidential Information of NHA (collectively, the **“School Materials”**). The School Materials shall include all intellectual property rights associated therewith.

C. NHA Materials. NHA shall own all right, title and interest in and to Educational Materials that are: (i) licensed or owned by NHA as of the Effective Date; (ii) licensed, developed, characterized, conceived, derived, generated, identified, or otherwise made by NHA during the

Term, provided such materials do not reference School Materials or incorporate any Confidential Information of the School; and (iii) any and all Educational Materials and non-curriculum materials provided to the School by NHA relating to the Educational Program, including all changes and derivatives thereof (collectively, the “**NHA Materials**”).

D. Derivative Works. The Parties acknowledge that to the extent any Educational Materials created by the School are derivative of the NHA Materials, use of such derivative materials during the Term is subject to the license granted herein, and the license to use such derivative materials shall cease as of the date of expiration or termination of this Agreement.

E. No Transfer or Sale. The School acknowledges and agrees that NHA is not transferring or selling, and the School is not receiving, purchasing or acquiring, any intellectual property or proprietary rights in or to the NHA Materials.

F. Licenses. NHA hereby grants the School a non-exclusive, non-transferable license (without the right to sublicense) to use the NHA Materials, and any Educational Materials created by the School which are derivative of the NHA Materials, solely in furtherance of the Educational Program during the Term, including without limitation, the right to reproduce, publicly display, distribute and create derivative works of the same, in hard copy format or electronically, within the United States. The School represents and warrants that during the Term, and following the expiration or termination of this Agreement, the School will not exploit or assist any third party to exploit any of the NHA Materials for commercial purposes. Subject to applicable law, the School grants NHA a non-exclusive, irrevocable, worldwide, assignable right to use, distribute, modify and display the School Materials, solely for educational purposes for the School, in any and all media now known or hereafter developed.

G. NHA Marks. During the Term, NHA grants the School a non-exclusive, revocable, non-transferable license (without the right to sublicense) to use NHA’s trade name(s) and NHA’s trademark(s) (the “**NHA Marks**”) solely for the purposes of promoting and advertising the School. NHA shall have the opportunity to review and approve all artwork, copy or other materials utilizing the NHA Marks prior to any production or distribution thereof. All uses of the NHA Marks require NHA’s prior written permission. The School shall acquire no rights in or to the NHA Marks, and all goodwill associated with the NHA Marks shall inure to the benefit of and remain with NHA. Upon expiration or termination of this Agreement, the School shall immediately discontinue use of the NHA Marks and shall remove the NHA Marks from its locations, vehicles, websites, telephone directory listings and all other written or electronic promotional materials.

H. Assignment. Each party shall, and hereby does assign to the other, with full title guarantee and without additional compensation, such right, title and interest in and to any intellectual property as is necessary to fully affect the ownership provisions set out herein, and any accrued rights of action in respect thereof. Each party shall, if so requested by the other, execute all such documents and do all such other acts and things as may be reasonably required to comply with this Agreement to vest in the appropriate party all rights in the relevant intellectual property and shall procure execution by any named inventor of all such documents as may reasonably be required by the other party in connection with any related patent application.

ARTICLE VI

SOLICITATION AND USE OF PRIVATE FUNDS

NHA shall seek the Board's approval prior to soliciting any non-governmental grants, donations or contributions on behalf of the School. Any such funds received shall be used solely in accordance with the purpose for which they were solicited, applicable donor restrictions, or as otherwise approved by the Board. Subject to applicable donor restrictions, the Board shall determine the allocation of any such funds subject to this Article that remain unexpended following completion of the project or purpose for which they were originally designated.

ARTICLE VII

FINANCIAL ARRANGEMENTS

A. Revenues. Except as provided herein, all monies received by the School during the Term shall be deposited in the School's depository account within three (3) business days with a financial institution acceptable to the Board; provided, however, that upon receipt of a notice from NHA, the School shall pay all such funds owing under this Agreement directly to the account or party specified in such notice. The signatories on the School depository account shall solely be Board members or properly designated Board agents (if any). Interest income earned on the School's depository account shall accrue to the School. Except as specifically excluded by this Agreement, the term "**Revenues**" shall include all funds received by or on behalf of the School, including but not limited to:

1. Funding for public school students enrolled at the School.
2. Special education funding provided by the federal and/or state government that is directly allocable to special education students enrolled at the School.
3. Academically or intellectually gifted funding provided by the federal and/or state government that is directly allocable to academically or intellectually gifted students enrolled at the School.
4. At-risk funding provided by the federal and/or state government that is directly allocable to at-risk students enrolled at the School.
5. Funding provided by the federal and/or state government that is directly allocable to students enrolled at the School with limited English proficiency.
6. All other federal and/or state grant sources, including, but not limited to, Title I and any start-up funding allocable to the School.
7. All other grants and donations received by the School to support or carry out programs at the School (except to the extent NHA is not required or involved in soliciting,

administering or managing the contribution and/or donation, in which case such funds shall be deposited in the Board Spending Account (as defined below)).

8. Fees charged to students as permitted by law for extra services provided by NHA as approved by the Board.

The expenditure of any Revenues received from governmental entities shall be consistent with all applicable regulations and policies. The expenditure of any Revenues received from non-governmental grants, contributions and donations shall be made consistent with the provisions of Article VI.

B. Budget. NHA shall provide the Board with an annual proposed Budget prepared and maintained in accordance with the Charter and applicable law (the “**Budget**”). For the School’s first school year, the Budget shall be submitted prior to the beginning of the school year. Thereafter, the Budget shall be submitted to the Board prior to June 1 for the next school year.

C. Review and Approval of Budget. The Board shall be responsible for reviewing and approving the Budget in accordance with the Charter and applicable law. At the direction of either NHA or the Board, with the approval of the Board, the Budget shall be amended from time to time as necessary.

D. Board Spending Account. Notwithstanding any other provision of this Agreement to the contrary, each school year during the Term, NHA shall allocate to an account controlled by the Board an amount equal to the lesser of: (i) 2% of state per pupil aid reflected in the Budget for that respective school year, or (ii) \$35,000 (the “**Board Spending Account**”). The aforesaid amount shall be deposited by NHA into the Board Spending Account pro-rata during the course of the School’s school year as Revenues are received. All funds in the Board Spending Account are the property of the School and may be used by the School at the discretion of the Board. Funds in the Board Spending Account that are not spent by the School during the school year shall carry over annually. Items purchased by NHA for the School and paid for by the School with funds from the Board Spending Account, such as non-proprietary instructional and/or curriculum materials, books, supplies and equipment, shall be the property of the School. The property of the School excludes items leased, financed or purchased by NHA with the Fee (as defined below). NHA agrees not to add any fees or charges to the cost of equipment, materials or supplies purchased by NHA on behalf of the School with funds from the Board Spending Account. NHA, in making such purchases for the School pursuant to this subsection, shall comply with applicable law, as if the School were making such purchases itself from a third party, and shall provide the Board, upon request, available documentation evidencing the costs associated with such purchases. NHA shall maintain a listing of all assets owned by the School and shall provide the list to the Board annually upon request.

E. Fee. NHA shall receive all Revenues as its services fee (the “**Fee**”), from which it shall pay all operating costs of the School as detailed in the Budget. NHA and the Board acknowledge that operating costs may include an administrative fee payable to the Authorizer as set forth in the Charter. Payment of the Fee shall be made on the same frequency that the School receives its Revenues. NHA shall be entitled to retain as compensation for the Services the

difference, if any, between the Fee and the amount actually expended by NHA in operation and/or management of the School during the School's fiscal year.

F. No Loans. NHA shall not make or extend loans to the Board.

G. Other Schools. The School acknowledges that NHA has entered into similar services agreements with other schools. NHA shall maintain separate accounts for expenses incurred in the operation of the School and other schools assisted by NHA, and shall reflect in the School's financial records only those expenses incurred in the operation of the School. If NHA incurs expenses that are for both the benefit of the School and other schools assisted by NHA, then NHA shall allocate, to the extent permitted by law, such expenses among all such affected schools, including the School, on a prorated basis based upon the number of enrolled students, the number of classrooms, or the number of teachers at the affected schools, or on such other equitable basis as is reasonably determined by NHA. In no event shall marketing costs incurred solely for the benefit of NHA (and not the School) be allocated to the School.

H. Financial Reporting. NHA shall provide the Board with:

1. At least annually, the Budget as required by this Agreement.
2. Monthly, financial statements no more than forty-five (45) days in arrears and at least one week prior to each Board meeting. These financial statements will include a Balance Sheet, Statement of Revenues, Expenditures and Changes in Fund Balance at object level detail with a comparison of budget to actual revenue and expenditures and explanations of variances.
3. Quarterly, or as reasonably requested by the Board, a report on School operations and student performance.
4. As reasonably requested, other information to enable the Board to: (i) evaluate the quality of the Services; and (ii) timely provide all reports and information that are required by the Charter and applicable law.

I. Access to Financial Records. NHA shall keep accurate financial records pertaining to its operation of the School, together with all School financial records prepared by or in possession of NHA, and shall retain all of the aforementioned records according to the Charter and applicable law to which such books, accounts, and records relate. NHA and the Board shall maintain the proper confidentiality of personnel, students, and other records as required by law. All records shall be kept in accordance with applicable state and federal requirements.

J. Accounting Standards; Annual Audit.

1. The School shall at all times comply with generally accepted public sector accounting principles and applicable law.

2. The Board shall select and retain an independent auditor to conduct an annual audit of the School’s financial matters in accordance with the Charter and applicable law.

3. Subject to applicable law, all records in the possession or control of NHA that relate to the School, including but not limited to, financial records, shall be made available to the School and the School’s independent auditor. The expense of the annual audit shall be included in the Budget.

K. Start-up Funds; Contributions. NHA shall provide start-up funds for: (i) the development of curriculum, a technology system and a school operations plan; (ii) recruiting, selecting and training of staff members; and (iii) to the extent necessary as reasonably determined by NHA, cleaning, renovating and equipping of the School facility (the “**Start-Up Funds**”). In addition, in its sole discretion, NHA may, but need not, make contributions to the School in the event School expenses exceed Revenues (the “**Contributions**”). The Contributions, if any, shall be in amounts acceptable to NHA and the Board and, once made, shall be included in the Budget. Unless otherwise agreed, the School shall not be legally obligated to repay NHA for the Start-Up Funds or the Contributions. NHA’s agreement to make such Contributions shall not be deemed to negate or mitigate the need for the School to apply for or solicit state or federal start-up funds, grants or sub-grants which the School, as a public school, may be eligible to receive.

ARTICLE VIII

PERSONNEL & TRAINING

A. Qualified Personnel. NHA shall select and hire qualified personnel to perform the Services. NHA shall have the responsibility and authority, subject to this Article, to select, hire, evaluate, assign, discipline, transfer, and terminate personnel consistent with the Budget, the Charter and applicable law. With the exception of teachers, as set forth below, and unless otherwise agreed by the written consent of the Parties, all School personnel shall be employees of NHA. NHA and the Board each shall be responsible for their respective employees. However, the compensation of all employees working at the School shall be included in the Budget. Upon Board request, NHA shall disclose to the Board the level of compensation and fringe benefits provided by NHA to NHA employees working at the School. A criminal background check and unprofessional conduct search in compliance with applicable law shall be conditions for the hiring of or services provided by any person who will or may be reasonably expected to have unsupervised access to and the care, custody or control of, any School student(s).

B. School Administrator. The School administrator (the “**Administrator**”) shall be an employee of NHA and not the Board. The duties and terms of the Administrator’s employment shall be determined by NHA. The Administrator shall work with NHA in the operation and management of the School. The accountability of NHA to the School is an essential foundation of this Agreement. Since the Administrator is critical to the School’s success, NHA shall have the authority, consistent with this Article, to select, hire, evaluate, assign, discipline, transfer and terminate the Administrator, and to hold the Administrator accountable for the performance of the School. Without limiting the foregoing, NHA shall consult with the Board prior to the placement and/or removal of the Administrator. Absent compelling circumstances, the consultation shall

commence at least ninety (90) days prior to NHA placing and/or removing the Administrator. NHA shall give due consideration to the input, if any, of the Board or the Board's designated representative prior to making a final decision regarding placement and/or removal of the Administrator. NHA shall remove the Administrator if the Board is reasonably dissatisfied with the Administrator's performance. Absent compelling circumstances, however, the Board shall give NHA and the Administrator six (6) months to correct the basis for the Board's reasonable dissatisfaction. The parties agree that the purpose of the above provisions is not to deny the Administrator the opportunity for growth and/or promotion within NHA. Notwithstanding any of the foregoing, the placement of the initial Administrator for the School in its first year of operation shall be made by NHA.

C. Teachers. The Administrator shall recommend to the Board for its consideration and approval, teachers who are qualified in the grade level and subjects required by the School to operate in accordance with the terms of the Charter. All teachers shall be jointly employed by the School and NHA for such purposes as inclusion in the compensation and employee benefit plans of NHA, payroll administration and other employment policies and practices; provided however, in all circumstances, the Board shall ultimately control the hiring and discharge decisions with respect to jointly employed teachers at the School in accordance with N.C. Gen. Stat. § 115C-218.90(1). Teachers assigned to and retained by the School shall hold a valid teaching license issued by the State Board of Education to the extent required by N.C. Gen. Stat. § 115C-218.90(1). Subject to the approval of the Board, such teachers may, in the discretion of NHA, work at the School on a full or part -time basis. If assigned to the School on a part -time basis, such teachers may also work at other schools for which NHA provides services under a similar agreement.

D. Support Staff. NHA shall, consistent with this Article, provide the School with qualified support staff as needed to operate the School in an efficient manner. The support staff may, at the discretion of NHA, work at the School on a full or part time basis. If assigned to the School on a part time basis, the support staff may also work at other schools assisted by NHA. The cost for such support staff shall be shared proportionately among the schools at which the support staff is working. An individual who provides a service to students in the School that is not teaching, and for which a license is required under applicable law, shall have the appropriate license to provide such services.

E. Training. NHA shall provide or procure training in its methods, curriculum, program, and technology to all teaching personnel on a regular basis. Instructional personnel shall be required to obtain at least the minimum hours of professional development as required by applicable law. Non-instructional personnel shall receive training as NHA determines reasonable and necessary under the circumstances.

F. Background Checks and Qualifications. NHA shall comply with applicable law regarding background checks, unprofessional conduct searches and certification/licensure, as applicable, for all persons working in the School.

G. Terms of Employment. No member of the staff at the School shall be subject to any covenant not to compete or other employment restriction as part of the terms of his or her employment with NHA for the Services.

H. Limitations on Discretion. All decisions made by NHA, and any discretion exercised by NHA, in its selection, hiring, evaluation, assignment, discipline, transfer, and termination of personnel, shall be consistent with the Budget, the Charter, the parameters adopted and included in the Educational Program, and applicable law.

ARTICLE IX

INDEMNIFICATION

A. Indemnification of Parties. To the extent not prohibited by the Charter or applicable law, the Parties hereby agree to indemnify, defend, and hold the other (the “**Indemnified Party**”), harmless from and against any and all third-party claims, actions, damages, expenses, losses or awards which arise during the Term out of (i) the gross negligence or intentional misconduct of the indemnifying party, (ii) any action taken or not taken by the indemnifying party, or (iii) any noncompliance or breach by the indemnifying party of any of the terms, conditions, warranties, representations, or undertakings contained in or made pursuant to this Agreement. As used herein, Indemnified Party shall include the party’s trustees, directors, officers, employees, agents, representatives and attorneys. The Parties may purchase general liability, property, or other insurance policies. Notwithstanding anything in this Agreement to the contrary, the Board shall not be precluded by the terms of this Agreement from asserting or declining to assert a claim of governmental immunity.

ARTICLE X

INSURANCE

A. Insurance Coverage. NHA shall maintain during the Term such policies of insurance as required by the Charter and applicable law. Each party shall, upon request, present evidence to the other that it maintains the requisite insurance in compliance with the provisions of this Article. Each party shall comply with any information or reporting requirements required by the other party’s insurer(s), to the extent reasonably practicable.

B. Workers’ Compensation Insurance. Each party shall maintain during the Term workers’ compensation insurance as required by law, covering their respective employees.

ARTICLE XI

REPRESENTATIONS & WARRANTIES

A. Board and School. The Board represents and warrants, for itself and on behalf of the School, that: (i) it is legally vested with all power and authority necessary to execute, deliver and perform this Agreement, including without limitation, the power and authority to contract with a private entity for the provision of educational, business administration and management services; (ii) upon issuance of a Charter it will be legally vested with all power and authority necessary to

operate a charter school under the Authorizing Law; (ii); (iii) its actions have been duly and validly authorized, and it has adopted any and all resolutions or expenditure approvals required for the execution of this Agreement; and (iv) there are no pending actions, claims, suits or proceedings, or, to its knowledge, threatened or reasonably anticipated against or affecting either the Board or the School, which if adversely determined, would have a material adverse effect on its ability to perform under this Agreement.

B. NHA. NHA represents and warrants that: (i) it is a corporation in good standing and is authorized to conduct business in the State of North Carolina; (ii) it is legally vested with all power and authority necessary to execute, deliver and perform this Agreement; (iii) there are no pending actions, claims, suits or proceedings, or, to its knowledge, threatened or reasonably anticipated against or affecting NHA, which if adversely determined, would have a material adverse effect on its ability to perform its obligations under this Agreement; and (iv) it will comply with all registration and licensing requirements relating to conducting business under this Agreement, which the Board agrees to assist NHA in applying for such licenses and permits and in obtaining such approvals and consents.

ARTICLE XII

MISCELLANEOUS

A. Entire Agreement. This Agreement and any attachments hereto shall constitute the entire agreement of the Parties on the subject matter set forth herein. This Agreement supersedes and replaces any and all prior agreements and understandings regarding the subject matter set forth herein between the School and NHA.

B. Force Majeure. Except for payment obligations, and notwithstanding any other provisions of this Agreement, neither party shall be liable for any delay in performance or inability to perform due to acts of God, war, riot, embargo, fire, explosion, sabotage, flood, accident, labor strike, or other acts beyond its reasonable control; provided either party may terminate this Agreement in accordance with provisions contained herein if sufficient grounds exist as provided in the Article governing termination.

C. State Governing Law; Waiver of Jury Trial. This Agreement shall be construed, interpreted, governed and enforced pursuant to the laws of the State of North Carolina, without regard to its conflict-of-laws principles. The Parties hereby waive the right to a jury trial in any action, proceeding or counterclaim brought by either NHA or the School against the other.

D. Notices. All notices and other communications required by this Agreement shall be in writing and sent to the Parties at the facsimile number or address set forth below. Notice may be given by: (i) facsimile with written evidence of confirmed receipt by the receiving party of the entire notice; (ii) certified or registered mail, postage prepaid, return receipt requested; or (iii) personal delivery. Notice shall be deemed to have been given on the date of transmittal if given by facsimile, upon the date of postmark if sent by certified or registered mail, or upon the date of delivery if given by personal delivery. For purposes of the foregoing, “**personal delivery**” shall include delivery by nationally recognized overnight courier (such as FedEx), if signed for by the recipient or a delegate thereof. Notices to the School shall be sent to the current address of the

then current Board President, with a copy to the then current Board attorney. The addresses of the Parties for the purposes aforesaid, including the address of the initial Board President, are as follows:

The School: Oak Grove Charter Academy
Attn: President, Board of Directors
Gerald McNair
1198 Summerfield Lane East 27522
Creedmoor, NC
Telephone: (919) 576-3337
Facsimile: N/A

WITH A COPY TO:

Adkins Law Office
Attn: Philip Adkins
192 Sheep Rock Rock Rd.
Snow Camp, NC 27349
Telephone: (919) 218-6060
Facsimile: (919) 869-1888

NHA: National Heritage Academies, Inc.
Attn: Chief Financial Officer
3850 Broadmoor, S.E. Ste. 201
Grand Rapids, Michigan 49512
Telephone: (616) 222-1700
Facsimile: (616) 222-1701

WITH A COPY TO:

McShane & Bowie
Attn: John R. Grant
1100 Compau Square Plaza
99 Monroe Ave., NW
Grand Rapids, Michigan 49501
Telephone: (616) 732-5013
Facsimile: (616) 732-5099

E. Assignment. NHA may assign this Agreement with the prior written approval of the Board and in a manner consistent with the Authorizer's policies.

F. Amendment. This Agreement shall not be altered, amended, modified or supplemented except by memorandum approved by the Board and signed by both an authorized officer of the School and NHA and in manner consistent with the Authorizer's policies.

G. Waiver. No waiver of any provision of this Agreement shall be deemed or shall constitute a waiver of any other provision. Nor shall such waiver constitute a continuing waiver unless otherwise expressly stated.

H. Severability. If any term or provision of this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remainder of the terms and provisions set forth herein shall remain in full force and effect and shall in no way be affected, impaired or invalidated, and the Parties shall use their best efforts to find and employ an alternative means to achieve the same or substantially the same result as that contemplated by such term or provision.

I. Delegation of Authority. Nothing in this Agreement shall be construed as delegating to NHA powers or authority of the Board which are not subject to delegation by the Board under the Charter or applicable law.

J. Compliance with Law. Each party will comply with the Charter and laws applicable to the performance of such party's obligations hereunder.

K. Time of Essence. The Parties understand and agree that time is of the essence in performing their respective responsibilities under this Agreement during the Term of this Agreement.

L. Indebtedness. No indebtedness of any kind incurred or created by the charter school shall constitute an indebtedness to the State or its political subdivisions, and no indebtedness of the charter school shall involve or be secured by the faith, credit or taxing power of the State or its political subdivisions. (See NCGS 115C-218 et seq).

[Signatures on Following Page]

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date first written above to be effective as of the Effective Date.

NHA:

National Heritage Academies, Inc.,
a Michigan corporation

By:  _____

Its: Chief Financial Officer

SCHOOL:

Oak Grove Charter Academy
a North Carolina non-profit corporation

By:  _____

Its: Board President



Appendix A4.2: EMO/CMO Facility Buyout Agreement

Oak Grove Charter Academy

LEASE

THIS LEASE (“**Lease**”) is entered into the ___ day of _____ 201_, to be effective July 1, 201_ (the “**Effective Date**”) by and between NATIONAL HERITAGE ACADEMIES, INC., a Michigan corporation, of 3850 Broadmoor SE, Ste. 201, Grand Rapids, Michigan 49512 (“**Landlord**”), and OAK GROVE CHARTER ACADEMY, a North Carolina non-profit corporation, having an address of _____, _____, North Carolina _____ (“**Tenant**”).

RECITALS

A. Landlord (defined in Section 22.5), as tenant, and Charter Development Company, L.L.C., as landlord (together with its successors, assigns and successors in interest, the “**Master Landlord**”) are party to that certain Master Lease Agreement effective January 1, 1999, as amended (the “**Master Lease**”).

B. Landlord and Master Landlord amended the Master Lease to subject the Premises thereto.

C. Tenant desires to sublease the Premises from Landlord, and Landlord desires to so sublease the Premises to Tenant, on the terms and conditions set forth herein.

NOW, THEREFORE, in consideration of the mutual covenants set forth above and herein, Landlord and Tenant agree as follows:

ARTICLE 1

The Premises and Other Agreements.

1.1 Premises. Landlord hereby leases to Tenant, on the terms and conditions hereinafter set forth, the real estate located in _____, North Carolina, (_____ County), with an address of _____, _____, North Carolina _____ and more particularly described on Exhibit “A” attached hereto (the “**Land**”), and all improvements located on the Land (the Land and such improvements as they may exist from time to time, hereinafter referred to as the “**Premises**”).

1.2 Master Lease. This Lease is subordinate and subject to the Master Lease. Tenant covenants that it shall not through its negligent, intentional or wrongful acts or omissions cause a breach or default on the part of Landlord under the terms of the Master Lease. Landlord represents and warrants to Tenant that the terms of this Lease are not inconsistent with the terms of the Master Lease, and Tenant’s compliance with the terms of this Lease will not constitute a breach of the terms of the Master Lease. Landlord and Tenant each hereby indemnify the other party against all liability, judgments, costs, damages, claims, costs and expenses, including, without limitation, reasonable attorneys’ fees arising out of or relating to such indemnifying party’s breach of the covenants, representations or warranties set out by such parties in the preceding two sentences.

1.3 Services Agreement. In accordance with the terms and conditions of that certain “**Services Agreement**” of even or similar date herewith, by and between Landlord and Tenant,

Landlord has contractually agreed to manage and operate the Premises and the school located on the Premises, and in connection with the same, Landlord is obligated to fulfill certain obligations assigned to Tenant under the terms of this Lease (the “**Services Obligations**”). In the event that Landlord fails to timely perform or fulfill one or more of the Services Obligations and said failure (a) is not otherwise excused, or subject to notice and an unexpired cure period, by the terms of the Services Agreement, and (b) is not due to the fault of Tenant, then said failure, in and of itself, shall not be deemed to be a Default by Tenant under the terms of this Lease. The foregoing sentence shall be of no further force and effect in the event of expiration or termination of the Services Agreement for any reason.

ARTICLE 2

Term.

2.1 Initial Term and Renewals. The “**Initial Term**” of this Lease shall commence on July 1, 201_ and shall terminate effective June 30, 201_ (the “**Initial Term Expiration**”), unless sooner terminated as hereinafter set forth. Provided that (a) Tenant is not then in Default under this Lease, the Services Agreement, or the “**Charter**” (as defined in Section 13.1.E. below), and (b) this Lease, the Services Agreement and the Charter are still in full force and effect, then, unless a Notice of Non-Renewal is sent as provided below, on the Initial Term Expiration (and each anniversary thereof, during the Term of this Lease), this Lease shall be automatically renewed for successive one (1) year terms, upon the same terms and conditions as contained herein. The “**Term**” of this Lease shall mean the Initial Term and every renewal term entered into by Landlord and Tenant. The term “**Upcoming Expiration Date**” shall mean the Initial Term Expiration, or if the Initial Term Expiration has occurred, then the upcoming anniversary of the Initial Term Expiration. If either party, in its sole discretion, does not wish for this Lease to automatically renew, then at least one hundred eighty (180) days prior to the Upcoming Expiration Date, such party must notify the other party in writing that it does not wish the Term to be renewed (a “**Notice of Non-Renewal**”). Upon the timely delivery of a Notice of Non-Renewal, this Lease shall terminate on the Upcoming Expiration Date.

2.2 If Tenant is entitled to terminate this Lease due to Landlord’s default hereunder or if Tenant is entitled to terminate the Services Agreement due to Landlord’s default thereunder, then provided that Tenant is not in default hereunder or under the Services Agreement, Tenant may elect by written notice to Landlord given within thirty (30) days after Tenant provides notice to Landlord of such default and Landlord fails to cure such default, leave this Lease in effect (except for any Lease renewal and assignment rights) for the remainder of the school year then in effect plus the succeeding one (1) school year (July 1 to June 30)(collectively, the “**Holdover Period**”), in which event the effective termination date of the Lease shall be the earlier of the last day of such Holdover Period or the date upon which Tenant vacates the Premises in accordance with the terms of this Lease, provided however that at the time of Tenant’s election and at all times during such Holdover Period Tenant (i) is not in default under this Lease or the Services Agreement, and (ii) Tenant’s Charter is in full force and effect (the “**Holdover Option**”). In the event Tenant so elects to remain in possession pursuant to the Holdover Option, Tenant shall give Landlord written notice not later than sixty (60) days before the last day of each succeeding school year during the Holdover Period as to whether or not Tenant elects to remain in possession for the next succeeding school year; in the event Tenant gives no such notice, Tenant shall be deemed to

have elected not to remain in possession, and the Lease shall terminate when Tenant vacates the Premises (which it shall timely due upon the end of the then school year).

ARTICLE 3

Rent.

3.1 Annual Rent. During the Initial Term, Tenant hereby leases said Premises for the Term above stated and agrees to pay Landlord annual rent of _____ and ___/100 Dollars (\$ _____), (“**Annual Rent**”) in twelve (12) equal monthly installments of _____/100 Dollars (\$ _____) (each, a “**Monthly Installment**”) each payable to Landlord (or to such other “Person” (defined in Section 22.9) or agent as Landlord may specify by written notice to Tenant) in advance on the first day of each calendar month during the Term. The term “**Lease Year**” is defined to mean any twelve month period from July 1 to June 30 of the following year, during the Term. If the Term ends before the end of a Lease Year, Annual Rent shall be prorated on a daily basis and paid in advance by Tenant on the first day of the last calendar month during the Term. Annual Rent may be adjusted upon determination of final costs for acquisition and construction of the Premises.

3.2 Additional Rent. Any amounts due from Tenant to Landlord hereunder, other than Annual Rent, shall constitute “**Additional Rent.**” Additional Rent shall, unless expressly provided to the contrary in this Lease, be payable from Tenant to Landlord on the same terms that Annual Rent is payable, with the next payment of the Monthly Installment coming due hereunder. Annual Rent and Additional Rent may be referred to collectively herein as “**Rent**”.

3.3 Payments. All Rent shall be paid to Landlord at Landlord’s address as set forth in the introductory paragraph hereof, or at such other address as Landlord may designate in writing. This Lease is a triple net lease and Rent shall be paid without setoff, counterclaim, recoupment, abatement, suspension, or deduction, except as expressly provided for herein. This Lease shall not terminate, nor shall Tenant have any right to terminate this Lease during the Term (except as otherwise expressly provided herein), nor shall Tenant be entitled to any abatement, deduction, deferment or reduction of Annual Rent hereunder (except as otherwise expressly provided herein), nor shall the obligations of Tenant under this Lease be affected by any interference with Tenant’s use of the Premises unless caused by Landlord or Master Landlord. It is the intention of the parties hereto that the obligation of Tenant to pay Rent hereunder shall be separate and that the Rent shall continue to be payable in all events and that the obligations of Tenant hereunder shall continue unaffected, unless the requirement to pay or perform the same shall have been terminated pursuant to an express provision of this Lease.

3.4 Landlord’s Right to Increase. In the event Landlord makes future economic investments in capital improvements to the Premises, or acquires additional property for the benefit or use of Tenant (with such capital improvements or additional property acquisitions being subject to the written consent of Tenant if and to the extent that the cumulative costs thereof exceed Two-Hundred and Fifty Thousand Dollars (\$250,000) during any Lease Year, which consent shall not be unreasonably withheld, conditioned or delayed), then the Annual Rent payable by Tenant shall be promptly adjusted to compensate Landlord for such additional economic investment.

ARTICLE 4

Use, Occupancy and Purpose.

4.1 Permitted Uses.

A. Tenant shall use the Premises solely for operating a publicly chartered school or academy for grades kindergarten through 8th grade, and for ancillary or directly related uses.

B. Any other use of the Premises must be approved by Landlord in advance in writing.

4.2 Restrictions on Use.

A. Tenant shall not use or allow the use of the Premises for any unlawful purpose, nor shall Tenant allow the Premises to be used in violation of the Charter.

B. Tenant shall not allow the Premises to be used in violation of any public law, ordinance, rule or regulation, or in violation of any certificate of occupancy or certificate of compliance covering or affecting the Premises, or any part thereof. Tenant shall not suffer any act to be done or any condition to exist on the Premises or any part thereof which may in law constitute a nuisance, public or private, or which may make void or voidable, or increase premiums for, any insurance with respect thereto. Tenant shall not commit any waste, damage, or injury of or to the Premises or the fixtures or any part thereof and shall take all reasonable precautions and actions to prevent others from committing any of the foregoing.

4.3 Prohibited Uses.

A. Tenant covenants unto Landlord that during the Term, no part of the Premises shall be used for: the operation of any (i) private or commercial golf course, (ii) country club, (iii) massage parlor, hot tub facility, or suntan facility (iv) race track or other facility used for gambling, or (v) store the principal business of which is the sale of alcoholic beverages for consumption off premises; or the rental to others of residential property (as defined in Section 168(e)(2)(A) of the Internal Revenue Code).

B. Notwithstanding anything contained in this Lease to the contrary, in the event of a breach of any of the covenants contained in this Section 4.3, Landlord may immediately terminate this Lease by written notice to Tenant.

4.4 Educational Program. Tenant shall neither use the Premises nor allow the Premises to be used at any time during the Term in a manner that interferes with the performance of Landlord's obligations under the Services Agreement, including without limitation, the implementation and delivery of the Educational Program at the Premises. Tenant acknowledges that the terms of the preceding sentence are intended to allow Landlord to restrict access to certain portions of the Premises at certain times provided such access restriction is at all times consistent with the implementation and delivery of the Educational Program.

ARTICLE 5

Utilities.

5.1 Utility Connections; Utility Service. Landlord represents and warrants that construction of the Premises pursuant to Section 9.1 shall include provision of connections for all utility services necessary to the operation of a school at the Premises. Utility services, including without limitation gas, electricity, light, heat, water, sewage and telephone or other communication services, shall be contracted for and paid for by Tenant.

5.2 Disclaimers. Unless due to the gross negligence or willful misconduct of Landlord, Landlord shall not be liable for (i) any failure of water supply or electric current or any service by any utility provider or local government, or (ii) injury to persons, including death, or damage to property resulting from steam, gas, electricity, water, rain or snow which may flow or leak from any part of the Premises or from any pipes, appliances or plumbing works from the street or subsurface or from any other place. Any express or implied rights, easements or licenses for view purposes or for the passage of light and air are hereby expressly disclaimed by Tenant. Except as otherwise expressly provided in this Lease or as may be provided in the Services Agreement, Landlord shall have no obligation to provide any services to Tenant or to the Premises.

5.3 Modifications and Replacements. If the existing utility services are required to be modified or replaced for any reason by any utility company or authorized agency, governmental or otherwise, then Tenant shall make such modifications or replacements at Tenant's expense and shall save Landlord harmless therefrom.

ARTICLE 6

Taxes.

6.1 Payment by Tenant. Tenant shall pay all (a) taxes levied on or assessed against the Premises during the Term, (b) special assessments levied on or assessed against the Premises during the Term that become due and payable during the term of this Lease, and (c) other similar charges levied on or assessed against the Premises during the Term and that become due and payable during the term of this Lease, except income and other taxes assessed against or by reason of Landlord's reversionary interest in or income from the Premises (the "Taxes"), (i) prior to the date on which any penalties, interest or late charges would apply, and to save Landlord harmless from the payment thereof, or (ii) to Landlord, in accordance with the terms of Section 6.4, provided Landlord makes the demand on Tenant required in Section 6.4. Taxes for the first and last year of the Term or any extension or renewal thereof shall be prorated on the basis of the fiscal period for which such tax is assessed.

6.2 Landlord's Option to Pay. If at any time after any tax, assessment or similar charge so charged or assessed against said Premises shall become due or payable and Tenant shall neglect or fail to pay the same, Landlord, without being obligated to do so, may pay the same at any time thereafter, and the amount of any and all such payments so made by Landlord shall be and is hereby declared to be payable as Additional Rent with the next Monthly Installment due hereunder.

6.3 Payment at End of Term. At the termination of this Lease by lapse of time or otherwise, all Taxes payable by Tenant under the provisions of this Article 6 shall be paid by Tenant to Landlord.

6.4 Monthly Installments. Upon demand of Landlord, (i) Tenant shall pay as Additional Rent, in addition to each Monthly Installment due hereunder, a sum equivalent to one-twelfth of the amount estimated by Landlord to be sufficient to enable Landlord to pay at least thirty (30) days before they become due, all such taxes, assessments and other charges, and (ii) Tenant will deliver and pay over to Landlord such additional sums as are necessary to make up any deficiency in the amount necessary to enable Landlord to fully pay such taxes, assessments and other charges. Any such tax payments from Tenant may be commingled with the general funds of Landlord and no interest shall be payable in respect thereof. If Landlord receives tax payments from Tenant in accordance with this Section, then Landlord shall pay the full amount of taxes, assessments and other charges when due to the appropriate taxing authorities. In the event Tenant's tax payments under this Section are in any way insufficient to pay the full amount of taxes, assessments and other charges when due to the appropriate taxing authorities, then Tenant shall pay to Landlord, as Additional Rent, any shortfall within thirty (30) days of receiving a demand therefor from Landlord.

6.5 Non-Real Property Taxes. In the event that the City, County, State, or any other political subdivision that has taxing authority over the Premises shall, during the Term, impose upon Landlord any tax or other governmental charge in lieu of all or any part of the Taxes (a "**Non-Real Property Tax**"), such Non-Real Property Tax shall, for purposes of this Section, be treated as if it were included in the Taxes, unless the Taxes have been paid by Landlord.

6.6 Receipts. Upon demand of Landlord within ninety (90) days after the date all or any part of the Taxes are payable by Tenant, Tenant shall provide to Landlord official receipts of the appropriate taxing authority or other proof satisfactory to Landlord of the payment of such Taxes.

ARTICLE 7

Insurance.

7.1 Tenant will cause to be maintained policies of fire and extended coverage insurance on all buildings, structures, fixtures and improvements now or hereafter situated on the Premises and all other property leased hereunder in their full replacement cost. Such policies shall have no greater than eighty (80%) percent co-insurance provision and shall contain the standard "agreed amount" clause for evaluating replacement cost. Such policies shall name Tenant, Landlord, other parties designated by Landlord and the "first mortgagee" (defined in Section 22.3) as their interests may appear as insureds and such insurance shall be carried by an insurance company or companies approved by Landlord and the first mortgagee. Tenant shall make available to Landlord on request copies of said policies. Notwithstanding the aforesaid, in no event shall the manner, forms, companies, sums or length of terms be less than that required by the first mortgagee according to the terms and provisions of the "first mortgage" (defined in Section 22.2)..

7.2 Each such policy shall include: (i) a standard mortgagee clause in favor of the first mortgagee; (ii) a provision to the effect that the waiver of subrogation rights by the insured does not void the coverage; (iii) a provision that the policy shall not be changed or canceled without at least thirty (30) days' prior written notice to Landlord and the first mortgagee; and (iv) a provision that any forfeiture of the policy due to an act of Tenant shall not affect the validity insofar as Landlord or the first mortgagee are concerned.

7.3 From time to time as required by Landlord or the first mortgagee, Tenant at its expense, shall obtain from an engineer or appraiser, in the regular employ of the insurer, or an appraiser, engineer, architect or contractor designated by Tenant and approved by Landlord and the insurer, such evidence as may be required by such insurer to maintain the "agreed amount" clause eliminating the possibility of any co-insurance penalty.

7.4 If Tenant shall refuse or fail to so insure and keep insured the Premises and keep such policies in Landlord's and first mortgagee's possession, Landlord may at its election procure and from time to time renew such insurance, and the amounts expended therefore shall be Additional Rent due from Tenant with the next installment of Rent accruing hereunder and may be collected in the same manner as though Rent due hereunder.

7.5 Upon demand from Landlord, Tenant shall pay in advance as Additional Rent, a sum equivalent to one-twelfth of the amount estimated by Landlord to be sufficient to enable Landlord to pay at least thirty (30) days before they become due all insurance premiums on all policies of insurance required or allowed to be carried by Tenant hereunder. Such Additional Rent may be commingled with the general funds of Landlord and no interest shall be payable in respect thereof. Upon demand by Landlord, Tenant will pay Landlord, as Additional Rent, such additional sums as are necessary to make any deficiency in the amount necessary to enable Landlord to fully pay such premiums.

7.6 Landlord shall have no liability for damage to or loss of personal property located upon the Premises, unless and to the extent caused by Landlord.

ARTICLE 8

Casualty; Restoration.

8.1 If the Premises are damaged by fire or other casualty (a "**Casualty**"), Tenant shall give immediate written notice thereof to Landlord and the first mortgagee ("**Tenant's Casualty Notice**"). Landlord shall, within 60 days after receipt of Tenant's Casualty Notice, deliver to Tenant a good faith estimate (the "**Damage Notice**") of the time needed to repair the damage caused by such Casualty ("**Restoration**").

If the Premises are damaged by Casualty such that Tenant is prevented from conducting its business in the Premises in a manner reasonably comparable to that conducted immediately before such Casualty and Landlord estimates that the damage caused thereby cannot be repaired within 210 days after the commencement of repairs (the "**Repair Period**"), then Tenant may terminate this Lease by delivering written notice to Landlord of its election to terminate within 30 days after the Damage Notice has been delivered to Tenant.

If a Casualty occurs and (1) Landlord estimates that the damage cannot be repaired within the Repair Period, (2) regardless of the extent of damage, (a) the damage occurs during the last twelve (12) months of the Term or (b) the damage is not fully covered by Tenant's insurance policies or any insurance Landlord may carry on the Premises or (c) Landlord makes a good faith determination that restoring the damage would be uneconomical, or (3) Landlord is required to pay any insurance proceeds arising out of the Casualty to a first mortgagee, then, in any such case, Landlord may terminate this Lease by giving written notice of its election to terminate within 30 days after the Damage Notice has been delivered to Tenant.

If neither party elects to terminate this Lease following a Casualty, then Landlord shall, within a reasonable time after such Casualty, begin to repair the Premises and shall proceed with reasonable diligence to restore the Premises to substantially the same condition as they existed immediately before such Casualty; however, Landlord shall not be required to repair or replace any improvements, alterations or betterments made by Tenant within the Premises (which shall be promptly and with due diligence repaired and restored by Tenant at Tenant's sole cost and expense) or any furniture, equipment, trade fixtures or personal property of Tenant or others in the Premises or the Project, and Landlord's obligation to repair or restore the Premises shall be limited to the extent of the insurance proceeds actually received by Landlord for the Casualty in question. If this Lease is terminated under the provisions of this Article 8, Landlord shall be entitled to the full proceeds of the insurance policies providing coverage for all alterations, improvements and betterments in the Premises (and, if Tenant has failed to maintain insurance on such items as required by this Lease, Tenant shall pay Landlord an amount equal to the proceeds Landlord would have received had Tenant maintained insurance on such items as required by this Lease).

8.2 Rent insurance proceeds, if payable, shall be applied by Tenant to the payment of, when and as due and payable, the installments of Rent and other payments due under this Lease until Restoration has been completed or until the Lease is terminated pursuant to any terms hereof. The balance, if any, of such proceeds shall be paid to Tenant or as Tenant may direct.

8.3 During any period of Restoration, Rent shall abate in proportion to the portion of the Premises that cannot be used for school purposes in Tenant's reasonable determination.

ARTICLE 9

Care of Premises.

9.1 Tenant will keep the Premises and all other property leased hereunder in good condition and repair, and will yield and deliver the same to Landlord at the expiration or termination of the Lease in as good a condition as when taken, reasonable use and wear thereof, and damages thereto by Landlord or its agents or invitees, excepted. Tenant shall also maintain all portions of the Premises and adjoining areas in a clean and orderly condition, free of dirt, rubbish, snow, ice and unlawful obstructions, except for those attributable to Landlord's use or action. Tenant may not make any repairs, alterations, additions, changes or improvements to the Premises, except as described above in Section 5.3, without the written consent of Landlord. All repairs, alterations, changes or improvements shall be completed and maintained by Tenant in good workmanlike condition, free and clear of all liens and encumbrances arising out of such work.

9.2 Without limiting the rights granted to Landlord under Article 4 of this Lease, Landlord shall have the right to enter upon the Premises for the purpose of making any repairs thereto and performing any work thereon which may be necessary by reason of Tenant's failure to make any such repairs or perform any such maintenance work as provided herein. Except in case of emergency, the privilege and right of entry shall be exercised at reasonable times and at reasonable hours. Tenant shall pay the cost of any such repairs and maintenance work to Landlord, upon demand therefor and upon submission of satisfactory evidence of Landlord's payment of such costs which sums shall constitute Additional Rent.

ARTICLE 10

Liability.

10.1 Tenant agrees to save Landlord and the first mortgagee harmless from any and all liabilities, losses, damages, penalties, costs and expenses arising from any injury or death to any person or damage to any property in, on, or about the Premises which arise out of (i) gross negligence or willful misconduct of Tenant, or (ii) any noncompliance or breach by Tenant of any of the terms, conditions, warranties, representations, or undertakings contained in or made pursuant to this Lease. Tenant agrees to procure at its own expense public liability and property damage, single limit liability insurance for the benefit of Landlord, Tenant and the first mortgagee as their interests may appear, in amount not less than One Million Dollars (\$1,000,000) to keep such insurance in force during the Term hereof, and to deliver certificates of such coverage to Landlord at least annually. In the event Tenant defaults as to any such obligations, Landlord may obtain such insurance and charge the cost thereof to Tenant as Additional Rent, payable with the monthly installment next coming due.

10.2 Landlord agrees to save Tenant harmless from any and all liabilities, losses, damages, penalties, costs and expenses arising from any injury or death to any person or damage to any property in, on, or about the Premises to the extent caused by willful misconduct or negligence by Landlord. Landlord agrees to procure at its own expense public liability and property damage, single limit liability insurance for the benefit of Landlord and Tenant as their interests may appear, in amount not less than One Million Dollars (\$1,000,000) to keep such insurance in force during the Term hereof, and to deliver certificates of such coverage to Tenant; Landlord agrees to furnish to Tenant upon request certificates of insurance evidencing such insurance.

10.3 Each party hereto, for itself and its respective successors and assigns (including any person, firm or corporation which may become subrogated to any of its rights), waives any and all rights and claims for recovery against the other party, and its officers, employees, agents, and assigns, or any of them, on account of any loss or damage to any of its property insured under any valid and collectible insurance policy or policies, to the extent of any recovery collectible under such insurance. Notwithstanding the foregoing, this waiver shall not be applicable if it has the effect of invalidating any insurance coverage of Landlord or Tenant.

ARTICLE 11

Compliance.

11.1 During the Term, Tenant shall assure compliance with all Legal Requirements relating to Tenant, the conduct of Tenant's business or pertaining to or otherwise affecting the use of the Premises; and Tenant shall reimburse Landlord for any damages or penalties suffered because of any such noncompliance. Landlord hereby represents that as of the Effective Date, the Premises is in compliance with all Legal Requirements; and Landlord shall reimburse Tenant for any damages or penalties suffered because of any such noncompliance of Landlord.

11.2 Tenant represents that no indebtedness of any kind incurred or created by Tenant herein shall constitute an indebtedness to the State or its political subdivisions, and no indebtedness of Tenant shall involve or be secured by the faith, credit or taxing power of the State or its political subdivisions. (See NCGS 115C-218.105).

ARTICLE 12

Assignment and Subletting.

12.1 Tenant shall not assign, transfer, sublet or otherwise allow the use by another Person of the Premises or any part thereof or any interest hereunder without first obtaining the written consent of Landlord, which may be withheld by Landlord for any reason. Landlord may, in its sole discretion, assign, transfer, pledge and convey its rights, title and interests in the Premises and/or this Lease, without the consent of or notice to Tenant; provided, however, the terms and conditions of this Lease as set forth herein as of the execution date of this Lease shall have not been modified or amended by such assignment and shall be subject to Section 23.3 hereof.

ARTICLE 13

Default.

13.1 Tenant shall be in default upon occurrence of any of the following events (any of the following, a "**Default**"):

A. Failure by Tenant to pay any portion of Rent for a period of more than ten (10) days after Tenant receives written notice of such failure to pay from Landlord (a "**Monetary Default**"); provided in no case shall Landlord be obligated to send notice of failure to pay more than twice in any twelve (12) month period.

B. Failure by Tenant to comply with any term, provision, condition or covenant of this Lease (other than a Monetary Default or as specified in Subsection F. below), if such failure is not cured by Tenant within a period of thirty (30) days after Tenant receives written notice from Landlord specifying such failure

C. Tenant's becoming insolvent, as that term is defined by any federal or state law or regulation (the "**Insolvency Laws**"); the appointment of a receiver or custodian for all or a substantial portion of Tenant's property or assets; the institution of a foreclosure action upon all

or a substantial portion of Tenant's real or personal property; the filing of a voluntary petition under the provisions of the Bankruptcy Code or Insolvency Laws; the filing of an involuntary petition against Tenant as the subject debtor under the Bankruptcy Code or Insolvency Laws, which is either not dismissed within sixty (60) days of filing, or results in the issuance of an order for relief against the debtor, whichever is later; or Tenant's making or consenting to an assignment for the benefit of creditors or a common law composition of creditors, or if Tenant's leasehold interest herein shall be levied on execution.

D. Termination of the Services Agreement due to default made or caused by Tenant in any of the covenants, terms or conditions of the Services Agreement required to be kept or performed by Tenant.

E. Expiration or discontinuance for any reason of the Charter granted to Tenant by its authorizer (the "**Charter**"), other than an expiration or discontinuance which results in a new Charter effective as of termination of the existing Charter and with terms which would not, in Landlord's opinion, substantially alter Tenant's ability to comply with the terms of the Lease, Services Agreement, or Charter.

F. Failure by Tenant to deliver the certificate required by Section 23.2 within the time required by such Section.

13.2 Landlord's Remedies. Upon the occurrence of any Default and the lapse of any grace or cure periods without cure thereof, Landlord shall have the option to pursue any one or more of the following remedies upon notice to Tenant:

13.2.1. *Termination.* Terminate this Lease or terminate Tenant's right to possession, and in either event, accelerate all obligations of Tenant owed to Landlord under the Lease and force Tenant to immediately surrender the Premises to Landlord. Tenant agrees to pay to Landlord on demand the costs which Landlord may suffer by reason of such termination. Immediately upon any termination Landlord shall be entitled to recover from Tenant (i) all outstanding and unpaid Rent as of the date of such termination, (ii) the unamortized cost of any initial upfit work performed according to this Lease by Landlord in anticipation of Tenant's occupancy, (iii) the amount of any Rent that was abated pursuant to this Lease, and (iv) all future Rent due for the remaining balance of the Term, which future Rent shall be discounted to present value using a discount rate equal to the U.S. Treasury Bill or Note rate with the closest maturity to the remaining term of the Lease as selected by Landlord.

13.2.2. *Possession.* Enter upon and take possession of the Premises and expel or remove Tenant and any other person who may be present, without terminating the Lease or being liable for prosecution or any claim for damages, and, if Landlord so elects, relet the Premises on such terms as Landlord may determine, subject, however to Tenant's right to stay in possession of the Premises until the end of the current school year in accordance with the Services Agreement.

13.2.3. *Entry.* Enter upon the Premises without being liable for prosecution or any claim for damages, and do whatever Tenant is obligated to do under the terms of this Lease. Tenant agrees to reimburse Landlord on demand for any expenses which Landlord may incur in effecting compliance with Tenant's obligations.

13.2.4. *Mitigation.* Landlord shall have a duty to mitigate damages in the event of a Tenant Default, provided, however, that Landlord shall not be obligated (a) to favor the Premises for re-letting in comparison to other real property owned or leased by Landlord in the vicinity of the Premises, (b) to discount or disregard any of the following factors regarding a potential new tenant for the Premises: term of proposed lease, proposed rent, proposed use and the creditworthiness and reputation of the proposed tenant, or (c) to spend more toward re-letting the Premises than Landlord would spend in leasing real property in the ordinary course of its business.

13.2.5. *Application of Proceeds.* Any proceeds of re-letting the Premises shall be applied to pay (i) first, all costs of Landlord incurred in connection with such re-letting (including without limitation, all costs and expenses of taking possession of the Premises, securing new tenants, including expenses for redecoration, alterations or other upfit costs), (ii) second, any indebtedness of Tenant other than Rent, (iii) third, all then-outstanding Rent due hereunder, and (iv) fourth, any future obligations of Tenant, including without limitation, Rent. Tenant agrees to pay to Landlord on demand any deficiency that may arise by reason of such re-letting within ten (10) days of notice of the same from Landlord, following a re-letting. In the event Tenant pays to Landlord all accelerated sums due, any amounts applicable to Rent following the date of re-letting shall be reimbursed to Tenant as received.

13.3 No termination of this Lease pursuant to this Section or repossession of the Premises or any part thereof or of any other property leased hereunder shall relieve Tenant of its liabilities and obligations under this Lease that accrue during the Term, all of which shall survive any such termination or repossession and, if the Premises or any part thereof shall not have been relet, Tenant shall pay to Landlord as and for liquidated and agreed current damages the then present value of the Rent and other sums and charges to be paid by Tenant until what would have been the end of the Term in the absence of such termination or repossession. Landlord shall make a good faith effort to relet the Premises and alleviate Tenant of additional damages. Exercise of any remedy hereunder by Landlord shall not exclude the right to exercise any other remedy hereunder. Notwithstanding any of the foregoing obligations of Tenant stated herein to the contrary, upon termination of this Lease or Tenant's dispossession of the Premises, Tenant will automatically be relieved from and after the date of such termination or dispossession of all personal liability for the performance of any covenants or obligations on the part of Tenant contained in this Lease thereafter to be performed except for those liabilities expressly stated to have survived such termination or dispossession as stated herein.

13.4 To the extent applicable, Tenant has been made aware that Master Landlord as landlord under the Master Lease, or National Heritage Academies, Inc., as tenant under the Master Lease or an Affiliate (defined in Section 22.1) of either or any other Person that enjoys an interest in the Premises seeks the benefits offered pursuant to the U.S. Department of Treasury New Markets Tax Credit program and may pursue other federal, state or city funds, subsidies (including any city real estate tax exemptions or abatements) or loans (collectively, the "**Benefits**") in connection with the use of the Premises, and as a result of the grant of the Benefits, the Premises may be subject to certain use restrictions. Tenant shall have no responsibility and bear no liability for any claims, fees, expenses, costs or other impositions arising from or in connection with the Benefits due to the termination of this Lease or Tenant's dispossession of the Premises.

ARTICLE 14

Waiver of Breach.

14.1 No waiver by either party hereto of any breach of any of the terms of this Lease shall be deemed to be a waiver of any other or subsequent breach.

ARTICLE 15

Surrender.

15.1 Upon the expiration or earlier termination of this Lease, Tenant shall (i) surrender the Premises in broom clean, in good condition, free and clear of all lettings and occupancies, (except those previously approved by Landlord), free and clear of all liens and encumbrances, except that part of the Premises which have been taken through eminent domain, if any, after the delivery hereof, and otherwise in the same condition as Tenant received the Premises on the first day of the Initial Term, except for the following (which are allowed to remain at the Premises): any alterations that Landlord has not required to be removed, normal wear and tear and loss by fire or other casualty losses for which insurance proceeds have been received by Landlord; (ii) surrender all keys for the Premises to Landlord and (iii) inform Landlord of all combinations on locks in the Premises. All installations, alterations, additions and improvements, including partitions which may have been installed by either Landlord or Tenant, shall remain upon the Premises and shall become Landlord's property, all without compensation, allowance or credit.

15.2 On or before the scheduled expiration of the Term, Tenant may elect to remove its personal property and any fixtures and equipment. Any of Tenant's items listed in the preceding sentence not removed at the end of the Term shall be considered abandoned, and Landlord may appropriate such items for itself, sell such items or otherwise dispose of the same in such commercially reasonable manner as Landlord deems expedient without any liability to Tenant or any parties claiming by, through or under Tenant. In the event the Term terminates for any reason on other than its scheduled expiration date, then Tenant shall have a period of time in which to re-enter the Premises to retrieve its personal property, beginning on the date the Term terminates and ending fifteen (15) days thereafter. Any damage caused to the Premises by such removal shall be repaired by Tenant no later than fifteen (15) days after the end of the Term, but no Rent shall be payable by Tenant for such period of time (and such continued use of the Premises by Tenant shall not be deemed a holdover or a renewal or as creating a periodic or other similar tenancy that might be implied by law). Tenant shall reimburse Landlord for any damage to any portion of the Premises caused by Tenant during the removal of any items contemplated for potential removal in this Section.

ARTICLE 16

Eminent Domain.

16.1 If all or any part of the Premises shall be taken by any Governmental Authority under power of eminent domain, or by private purchase in lieu thereof, all damages awarded for such taking shall belong to and be the property of Landlord, whether such damages shall be awarded as compensation for the taking of or diminution in value to the leasehold or the fee of the

Premises and Tenant hereby irrevocably assigns to Landlord any award or payment to which Tenant may become entitled as a result thereof, provided, however, that Tenant shall be entitled to receive from such Governmental Authority compensation for its fixtures and personal property so taken.

16.2 In the event that only a part of the Premises are so taken, and the part not so taken cannot be completed as an architectural unit for the use described in Section 4.1 hereof, Tenant shall have the option to terminate this Lease by serving written notice of termination on Landlord within sixty (60) days after the taking.

16.3 If only a part of the Premises shall be so taken such that the part not so taken can be completed as an architectural unit for the use described in Section 4.1 hereof, Landlord (or at Landlord's direction, Tenant) shall, as promptly as practicable, make a complete architectural unit of the remainder of the building on the Premises (but only to the extent of the proceeds received for such taking); and there shall be an abatement of the monthly Rent hereinabove provided for in an amount equal to the percentage of the Premises and the building so taken.

ARTICLE 17

Notices.

17.1 All notices and communications required under this Lease shall be in writing and served personally or by nationally recognized overnight courier on Landlord and on Tenant at the address indicated on page one (1) hereof, or at such other address as may be designated in writing to the other party hereto by notice in accordance with this Section.

ARTICLE 18

Self Help.

18.1 If Tenant shall at any time fail to make any payment or perform any act on its part to be made or performed hereunder, then Landlord without notice to Tenant, except when other notice is expressly provided for in this Lease and without waiving or releasing Tenant from the obligations of Tenant contained in this Lease, may (but shall be under no obligation to) make such payment or perform such act, and may enter upon the Premises for any such purpose, and take all such actions thereon as may be necessary to address Tenant's non-payment or failure to act.

18.2 All sums to be paid by Landlord and all costs and expenses incurred by Landlord in connection with the performance of any such act referenced in Section 18.1, together with any consequential damages Landlord may suffer by reason of the failure of Tenant to make such payment or perform such act, and counsel fees incurred by Landlord in connection therewith or in enforcing its rights hereunder, shall be paid by Tenant to Landlord on demand as Additional Rent.

18.3 Tenant agrees to hold Landlord harmless from any inconvenience or interference with Tenant's operation of its business as a result of Landlord's exercising any rights granted under Section 18.1.

ARTICLE 19

Construction Liens.

19.1 Tenant will not create nor permit to be created or to remain, and will promptly discharge, at its sole cost and expense, any lien, encumbrance or charge upon the Premises or any part thereof, or upon Tenant's leasehold interest therein, except such as are created by Landlord or the first mortgagee.

ARTICLE 20

Environmental Matters.

20.1 Tenant shall not use or store any Hazardous Materials (as defined in Section 20.3) on the Premises, except in compliance with Legal Requirements.

20.2 To the extent directly related to the conduct of Tenant, Tenant's use of the Premises, or the operation of its business thereon, Tenant shall defend, indemnify and hold harmless Landlord, its employees, agents, officers and directors, from and against any claims, demands, penalties, fines, liabilities, settlements, damages, costs or expenses of whatever kind or nature, known or unknown, contingent or otherwise, arising out of, or in any way related to, (1) the presence, disposal or release of any Hazardous Materials by Tenant on, over, under, from or affecting the Premises or the soil, water, vegetation, buildings, personal property, persons thereon by reason of Tenant's action or inaction on the Premises; (2) any personal injury (including wrongful death) or property damage (real or personal) arising out of or related to such Hazardous Materials existing on the Premises by reason of Tenant's action; (3) any lawsuit brought or threatened, settlement reached or government-issued order relating to such Hazardous Materials existing on the Premises by reason of Tenant's action; and/or (4) any violation of Legal Requirements based upon or in any way related to such Hazardous Materials existing on the Premises by reason of Tenant's action including, without limitation, reasonable attorney's and consultant's fees, investigation and laboratory fees, court costs and litigation expenses. As used herein, "**Hazardous Materials**" means and includes petroleum, petroleum products, asbestos, asbestos-containing materials, radioactive materials, waste oils, solvents and chlorinated oils, polychlorinated biphenyls (PCBs), and any other water, material or substance that is defined as hazardous or toxic under or regulated by any federal, state or local agency, law, rule or regulation (whether now existing or hereafter enacted or promulgated, as they may be amended from time to time) pertaining to environmental conditions, the environment, contamination or clean up, including, without limitation, federal, state or local solid waste disposal rules, the Comprehensive Environmental Response, Compensation and Liability Act of 1980, as amended, the Hazardous Materials Transportation Act, as amended, the Resource Conservation and Recovery Act, as amended, the Toxic Substances Control Act, as amended, the Water Pollution Control Act, as amended, the Clean Air Act, as amended, or any other applicable federal, state or local laws, regulations, publications of Governmental Authorities, or ordinances pertaining to Hazardous Materials (collectively, "**Environmental Laws**").

20.3 Tenant shall promptly notify Landlord as soon as it knows of or suspects that any Hazardous Materials has been released or that there is a threatened release on the Premises and it

shall take such action at its sole expense and with due diligence, as is necessary to insure timely compliance with Legal Requirements unless caused by Landlord. Landlord shall promptly notify Tenant as soon as it knows or suspects any Hazardous Materials has been released or that there is a threatened release on or in the Premises and Landlord shall take such action at its sole expense and with due diligence, as is necessary to ensure timely compliance with Legal Requirements unless caused by Tenant.

20.4 The Tenant has no liability for, or obligation to investigate, clean, remove, remediate or otherwise deal with Hazardous Materials present at the Premises prior to the date upon which Tenant first took possession or control of the Premises (it being the intent of the parties that as between Landlord and Tenant, Landlord shall be responsible for the foregoing, except (i) if and to the extent Tenant (its employees, contractors, licensees, officers, directors, or other parties claiming through or acting for Tenant) through its acts or omissions exacerbates such pre-existing condition, or (ii) otherwise provided under any applicable Legal Requirements, laws, ordinances, or regulations.

20.5 The provisions of this Article 20 shall be in addition to any and all obligations and liabilities of Tenant and Landlord may have to each other under Legal Requirements, and shall survive the expiration and termination of the Lease for any reason.

ARTICLE 21

Late Charges.

21.1 In the event of any failure by Tenant to pay Rent when due, Tenant shall also pay to Landlord, as Additional Rent, a late charge of five percent (5%) of such delinquent payment.

ARTICLE 22

Certain Definitions.

22.1 The term “**Affiliate**” means, with respect to any Person, any other Person that directly or indirectly through one or more intermediaries, controls, or is controlled by, or is under common control with, such first Person or any of its subsidiaries. As used in this definition, the term “control” means (a) the power to vote five percent (5%) or more of the securities or other equity interests of a Person having ordinary voting power, or (b) the possession, directly or indirectly, of any other power to direct or cause the direction of the management and policies of a Person, whether through ownership of voting securities, by contract or otherwise.

22.2 The term “**first mortgage**” means any mortgage now existing or hereafter becoming a first and paramount lien on the Premises, subject to easements and restrictions of record, and all assignments, modifications, extensions and renewals thereof.

22.3 The term “**first mortgagee**” or “**holder of the first mortgage**” means the Person(s) who is(are) the holder(s) or beneficiary(ies) under the first mortgage from time to time.

22.4 The term “**Governmental Authority**” or “**Governmental Authorities**” means the government of the United States of America or any state or other political subdivision of either

thereof, or any entity that exercises executive, legislative, regulatory, administrative, judicial, quasi-governmental or quasi-judicial functions of, or pertaining to, any such government, whether now or hereafter in existence having jurisdiction over the matter or matters in question.

22.5 The term “**Landlord**” is limited to mean and include, so far as covenants, agreements, stipulations or obligations on the part of Landlord are concerned, the tenant under the Master Lease to the Premises or its assignee, at the time in question, and in the event of any transfer or transfers of the title to such fee Landlord herein named (and, in case of any subsequent transfers or conveyances, the then grantor) will automatically be relieved from and after the date of such transfer or conveyance of all personal liability for the performance of any covenants or obligations on the part of Landlord contained in this Lease thereafter to be performed.

22.6 The term “**Legal Requirements**” means (i) all present and future applicable laws, statutes, treaties, rules, orders, ordinances, codes (including, without limitation, building and life-safety codes), regulations, requirements, permits, and interpretations by, and applicable judgments, decrees, injunctions, writs and like action even if unforeseen or extraordinary of any Governmental Authority (including, without limitation, Environmental Laws (defined herein), laws and regulations pertaining to health and safety, Insolvency Laws (defined herein), the Fair Housing Amendments Act of 1988, the Americans with Disabilities Act of 1990, and any other applicable Federal, State or local statute, law, ordinance, code, rule, regulation, order or decree regulating, relating to, or imposing liability or standards of conduct relating to barrier-free access or access of the handicapped or disabled to the Premises, and laws and regulations pertaining to the construction, restoration, use and operation of schools); and (ii) any reciprocal easement agreement, agreement, contract, instrument, restriction or similar agreement relating to the use, occupancy, possession, operation, alterations, repairs or maintenance of the Premises or otherwise affecting the Premises.

22.7 The term “**mortgage**” means any mortgage, deed of trust, deed to secure debt or other security instrument now existing as, or hereafter becoming a lien on the Premises.

22.8 The term “**mortgagee**” means the Person(s) who is(are) the holder(s) or beneficiary(ies) under any mortgage from time to time.

22.9 The term “**Person**” means any natural person, corporation, limited liability company, trust, joint venture, association, company, partnership, Governmental Authority or other entity.

ARTICLE 23

Subordination; Estoppel Certificates.

23.1 Tenant agrees that Landlord, or any mortgagee or lessor under any applicable ground or other underlying lease, may choose to make this Lease subordinate or paramount to any mortgages or ground or underlying leases now or hereafter affecting the Premises and to any and all advances to be made thereunder or to be secured thereby, and to the interest and charges thereon, and to all renewals, replacements and extensions thereof, and that upon any taking of possession of the Premises and accession to the interest of Landlord under this Lease by such lessor or mortgagee, Tenant shall attorn to and recognize such Person as landlord hereunder; provided

the mortgagee, lessor under any such ground or underlying leases, Landlord or any trustee named in any such mortgages or leases shall agree (i) to recognize the Lease of Tenant in the event of foreclosure if Tenant is not in Default and (ii) that Tenant's possession of the Premises under this Lease shall not be disturbed by such Person unless there is a Default. Tenant will execute promptly any instrument or certificate that Landlord may request to confirm such subordination.

23.2 Tenant, within ten (10) days after request by Landlord, will execute and deliver to Landlord (and any mortgagee or prospective mortgagee, or any current or prospective ground or underlying lessor, to the extent specified by Landlord) an estoppel certificate as to such reasonable facts and circumstances under this Lease as may be requested, but in any case including the following (i) identifying the commencement date and expiration date of this Lease, (ii) stating that this Lease is unmodified and in full force and effect, or is in full force and effect as modified, and then stating such modifications, (iii) stating that Tenant does not claim that Landlord is in default in any way, or listing any such claimed defaults, (iv) the amount of Monthly Installments then payable hereunder and Additional Rent, if any, as of the date of the certificate, (v) the date to which the Rent has been paid in advance, and (vi) the amount of any security deposit or pre-paid Rent. If Tenant fails to deliver the executed certificate to Landlord within the ten (10) day period, Tenant shall be in Default without benefit of any cure period, and the proposed certificate will be conclusively deemed executed by Tenant.

23.3 Upon the receipt of a notice from Landlord, Tenant agrees to pay all such sums owing under this Lease directly to the account or party specified in such notice.

ARTICLE 24

Quiet Enjoyment.

24.1 All times when Tenant is not in Default, Tenant's quiet and peaceable enjoyment of the Premises will not be disturbed or interfered with by Landlord or any Person claiming by, through or under Landlord.

ARTICLE 25

Holding Over.

25.1 Any holdover by Tenant in the Premises beyond the expiration or termination of the Term (other than pursuant to Article 2), shall not be deemed to be a renewal or extension of this Lease or any extension thereof or the exercise of any option to extend or renew this Lease, but said holding over shall be deemed a tenancy from calendar month to calendar month at a monthly Rent equal to two hundred percent (200%) of the Monthly Installment for the last month paid under the Term. A month-to-month tenancy arising by holding over under this Section may be terminated by either Landlord or Tenant giving written notice to the other party hereto on or before the day any Monthly Installment is due with termination becoming effective on the day the next following Monthly Installment would have otherwise become due.

ARTICLE 26

Remedies Not Exclusive; Waiver.

26.1 Each and every of the rights, remedies and benefits provided by this Lease to Landlord are cumulative, and are not exclusive of any other of said rights, remedies and benefits, or of any other rights, remedies and benefits allowed by law.

26.2 One or more waivers of any covenant or condition by Landlord will not be construed as a waiver of a further or subsequent breach of the same covenant or condition, and the consent or approval by Landlord to or of any act by Tenant requiring Landlord's consent or approval will not be deemed to waive or render unnecessary Landlord's consent to or approval of any subsequent similar act by Tenant.

ARTICLE 27

Right To Show Premises.

27.1 Landlord may show the Premises and may display about the Premises signs advertising the availability of the Premises at any time during the Term of this Lease.

ARTICLE 28

Landlord's Liability.

28.1 If Landlord fails to perform any provision of this Lease upon Landlord's part to be performed, and if as a consequence of such default Tenant recovers a money judgment against Landlord, such judgment may be satisfied only out of the proceeds of sale received upon execution of such judgment (subject to any prior mortgages and ground or underlying leases) and levied thereon against the right, title and interest of Landlord in the Premises and out of rents or other income from such property receivable by Landlord, and Landlord shall not be personally liable for any deficiency.

ARTICLE 29

Termination of Services Agreement.

29.1 In the event the Services Agreement is terminated by Landlord or Tenant, as party thereto, (a) due to the default of the other party thereto, then upon the giving of notice as required by this Section, the non-defaulting party for purposes of the Services Agreement may, at its option, terminate this Lease without penalty (except as provided in Section 13.1.D hereof), with the effective date of lease termination being the same as the date on which the Services Agreement terminates, (b) pursuant to any of the termination rights or options provided therein other than those arising in the event of a default or breach by the other party to the Services Agreement, then in any such event and upon the giving of notice as required by this Section, Tenant or Landlord may, at its option, terminate this Lease without penalty, with the effective date of lease termination being the same as the date on which the Services Agreement terminates. To exercise any of the termination rights or options provided in the previous sentence, the party so exercising shall notify

the other party hereto of their exercise of any such lease termination right no later than thirty (30) days after the date on which the notice terminating the Services Agreement is sent.

ARTICLE 30

General.

30.1 References in this Lease to Persons have been generalized for ease of reading. Therefore, references to a single Person will also mean more than one Person whenever such usage is appropriate (for example, “**Tenant**” may include, if appropriate, a group of Persons acting as a single entity, or as tenants-in-common). Similarly, pronouns of any gender should be considered inter-changeable with pronouns of other genders. If a party consists of more than one Person, such Persons shall be jointly and severally liable for the obligations of such party under this Lease.

30.2 Any waiver or waivers by either party of any of the provisions of this Lease will not constitute a waiver of any later breach of that provision, and any consent or approval given by either such party with respect to any act, neglect or default by the other party will not waive or make unnecessary the other party’s consent or approval with respect to any later similar act, neglect or default by such other party.

30.3 In the event any provision contained herein shall be held to be invalid or unlawful for any reason, such provision shall be deemed to be stricken from this Lease, with the understanding that the remaining provisions hereof shall continue to be binding on the parties.

30.4 Topical headings appearing in this Lease are for convenience only. They do not define, limit or construe the contents of any sections, paragraphs or clauses.

30.5 This Lease can be modified or amended only by a written agreement signed by Landlord and Tenant.

30.6 All provisions of this Lease are and will be binding on the heirs, executors, administrators, personal representatives, successors and assigns of each of Landlord and Tenant.

30.7 The laws of the state in which the Premises are located will control in the construction and enforcement of this Lease, without regard to any laws or policies of such state regarding conflicts of law.

30.8 Time is of the essence of all terms and conditions of this Lease.

30.9 Landlord and Tenant each represent and warrant to the other that neither of them has contacted a broker, finder or similar Person in connection with this Lease, and each party shall defend, indemnify and hold the other harmless from and against all liability, cost and expense, including reasonable attorneys’ fees, incurred as a consequence of any claim asserted by a Person alleging to have dealt with one of the parties hereto in connection with this Lease.

[Signatures on Following Page]

IN WITNESS WHEREOF, the parties hereto have executed this Lease as of the day and year first above written.

LANDLORD:

National Heritage Academies, Inc.
a Michigan corporation

By: _____
Its: Chief Financial Officer

TENANT:

Oak Grove Charter Academy

By: _____
Its: Board President

DRAFT

EXHIBIT "A"

LEGAL DESCRIPTION OF PREMISES

DRAFT



Appendix A4.3: EMO/CMO Financial History (Bank Statements)

Oak Grove Charter Academy



August 14, 2019

Gerald McNair
Lead Applicant
Oak Grove Charter Academy, Inc.

Via: Hand Delivery

Re: Oak Grove Charter Academy, Inc. and NHA

Dear Mr. McNair,

I understand that Oak Grove Charter Academy, Inc. has partnered with National Heritage Academies ("NHA") to prepare a charter application for a new school to open in 2021. I write this letter to provide history on the financial stability of the organization over the past years.

NHA is an educational management organization, and operates 88 schools in 9 states. NHA has been a customer of PNC Bank for more than 10 years. NHA is in good standing and has been for the duration of our relationship. The company currently has a revolving credit facility with the bank. As of this date, availability on the revolving credit facility is sufficient to ensure the resources are available to meet the commitments to secure a school site, construct or renovate school facilities, and provide for the start-up costs presented in the application.

NHA is also financially able to meet the commitments to fund the predicted operating shortfalls during the first years of operation.

If I can be of further assistance, please call me at 616-771-9184.

Sincerely,

A handwritten signature in black ink, appearing to read "Jason Manchesky".

Jason Manchesky,
Senior Vice President



Appendix A4.4: IRS Form 990

Oak Grove Charter Academy

Our Board is partnering with National Heritage Academies (NHA), an Education Management Organization, for the operation of Oak Grove Charter Academy. NHA is a privately held, for-profit corporation. As such, they do not submit an IRS Form 990.

Please see Appendix A4.3: EMO/CMO Financial History for a letter supporting the organization's financial stability.



Appendix A: Evidence of Parent/Community Support

Oak Grove Charter Academy

School Interest Survey Results

To gather more information from residents in our area about their interest in a potential new charter school, we commissioned a phone call survey in July 2019. For our survey, we focused on parents of students in the grades we intend to serve.

In total, 130 parents completed our survey. After the conclusion of our survey, 50 percent of respondents stated if the new charter school opened, they would like to be contacted with further information about the school. Survey results also showed nearly half (46 percent) of respondents stated they would be “Highly Likely” or “Likely” to apply.

This initial survey confirmed our intimate understanding that, like members of our board, families in our community are demanding additional public school choice for their children.

School Capacity and Growth Challenges

The city of Durham has experienced rapid population growth throughout its history, in fact the Durham-Chapel Hill area is the state’s fourth-fastest-growing metro area. Over the previous decade, Durham has experienced a 20 percent increase in the county’s population. This increase represented 11 new residents and five new households every day of the past 10 years. According to the U.S News and World Report, Durham is the tenth best place to live in the USA. The percent of persons under the age of 18 is 20.8 percent and over 22 percent are in the 25 to 44 age range. The average family size is 3.07. This data shows there are many households in Durham with school-age children. A thriving economy is one of the reasons the city of Durham’s population will continue to grow.

Employment opportunities available in Durham’s job market over the next 10 years is predicted to be 43.3 percent, which is higher than the U.S average of 33.5 percent. Education, finance, and health care are among the key sectors attributing to Durham’s economic growth. The relocation of the Department of Health and Human Service, the largest agency of state government, headquarters is moving from Raleigh to Granville County. This will result in a significant number of jobs in Granville County. Granville County is located just north of the Raleigh-Durham area and we expect that our school may draw students from that area.

The city’s unemployment rate is a major indicator of the economy’s overall health. Durham’s unemployment rate is 3.6 percent, which is lower than the United States unemployment rate of 3.9 percent. In 2019, two businesses announced expansions in Durham. These two companies made the North Carolina’s top job-creating projects list.

- AveXis Inc., a leading clinical-stage gene therapy company will invest \$60 million to expand its manufacturing center in Durham. This expansion will create 400 new jobs in Durham County.
- Sensus USA., a provider of advanced metering technologies to utilities and municipalities, will expand operations creating over 300 jobs.

NHA has 13 partner-schools in North Carolina; one partner-school being in Durham (Research Triangle Charter Academy). Research Triangle Charter Academy as of 7/31/19, has a wait list of over 200 students for the 2019-20 school year.

A recent study by the Thomas B. Fordham Institute found there are hundreds of “charter school deserts” in the U.S. The report defines a charter school desert as three or more contiguous census tracts that have high poverty rates greater than 20 percent but that have no charter schools. In North Carolina, the report found 14 charter school deserts, including two in Raleigh

and two in Durham We intend to serve the eastern part of Durham, an area classified as a charter desert.

Media Coverage of School Capacity Issues

For more detailed information on the capacity challenges our schools are experiencing, please review the articles at the links below:

“Raleigh, Durham and Charlotte need more charter schools in poor areas”

<https://www.newsobserver.com/news/local/article209911734.html>

Biopharmaceutical manufacturer selects Durham and Wilson Counties for New Projects

<https://www.nccommerce.com/news/press-releases/biopharmaceutical-manufacturer-merck-selects-durham-and-wilson-counties-new>

North Carolina’s top job-creating projects

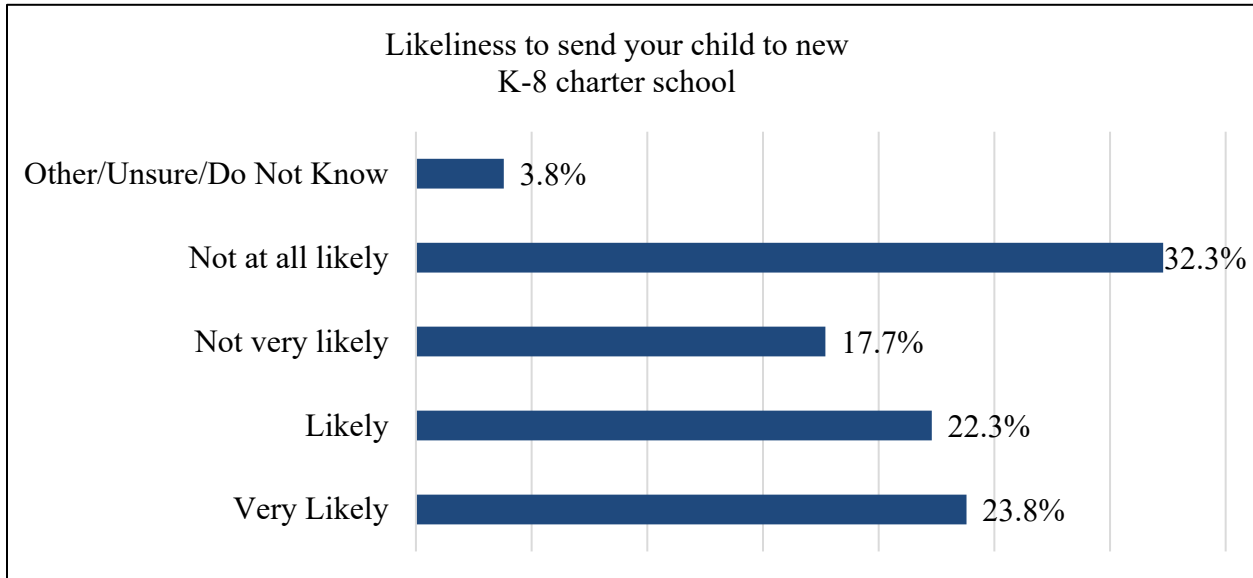
<https://businessnc.com/north-carolinas-top-job-creating-projects/>

Charter School Deserts: High Poverty Neighborhoods with Limited Educational Options

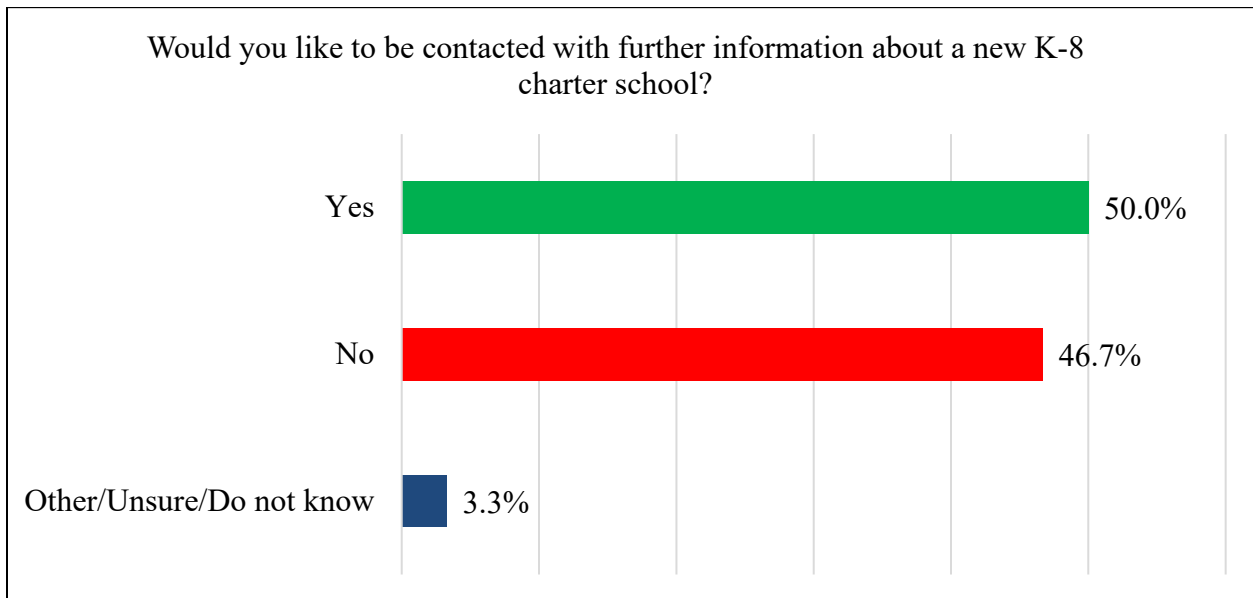
<http://edex.s3-us-west>

2.amazonaws.com/publication/pdfs/%2804.26%29%20Charter%20School%20Deserts%20-%20High%20Poverty%20Neighborhoods%20with%20Limited%20Educational%20Options%20-.pdf

If a new K-8 grade charter school opened in your area that had college-readiness as its focus, how likely would you be to send your child to that school? Would you be *very likely*, *likely*, *not very likely*, or *not at all likely* to send your child to that school?



A new K-8 grade charter school may be coming to your community. If this new charter school opened, would you like to be contacted with further information about the school?





Appendix B: Curriculum Outline for Each Grade Band the School Will Ultimately Serve

Oak Grove Charter Academy

Synopsis of Planned Curriculum

Oak Grove Charter Academy will use the K-8 curriculum designed for NHA-partner schools (including 13 in North Carolina) which has been carefully aligned with the state standards. The school's core content areas of English language arts (ELA), mathematics, science, and social studies, summarized very briefly below, will be supplemented by co-curricular areas that help shape students as well-rounded individuals, including art, music, physical education, and library and educational technology. Character development (moral focus), too, will be an integrated component of the curriculum.

ELA: In grades K-2, the curriculum will emphasize the foundations of reading. This includes the ability to decode automatically, read with fluency, and gain the capacity to comprehend increasingly complex texts across a range of types and disciplines. Student literacy will be promoted through rich, domain-specific content in a variety of fiction and nonfiction texts, including a true balance of informational and literary genres. In grades 3-5, reading instruction will focus on complex, grade-appropriate texts to prepare students for the complexity of materials they must study to become college- and career-ready. Reading instruction will feature a balance of informational and literary work. In grades 6-8, ELA, social studies, and science teachers will offer literary experiences in their content areas, using materials chosen specifically for their literacy value. The middle school curriculum will include a blend of classic literature and literary nonfiction, including substantial exposure to historical and scientific documents.

Math: The math curriculum underscores the importance of number sense and operations, measurement, computation using formal algorithms, geometry, data analysis and probability, and problem-solving and inquiry. It follows the state standards for math (found online at <https://www.cde.state.co.us/comath/statestandards>). In grades K-2, number sense and computational fluency will be the main focus of students' learning. In grades 3-5, learning will shift from computation to fractional awareness. The ability to compose and decompose numbers will be built upon to deepen understanding of fractions, percentages, decimals, and computation. Algebraic skills will also be developed. In grades 6-8, the focus will be on the study of algebra and functions.

Science: In grades K-2, the content of the science curriculum focuses on scientific inquiry and engineering designs primarily through the study of events and phenomena in nature. In grades 3-5, the science curriculum directs students to begin exploring the science and engineering practices, crosscutting concepts, and engineering design solutions by making connections between events. In grades 6-8, the curriculum includes further exploration of the relationships between science and engineering practices and crosscutting concepts while also connecting knowledge of scientific concepts to real world examples and solidifying congruence between students' understanding of phenomena to that of the scientific community.

Social Studies: The social studies curriculum emphasizes how geography and economics interact in a global society and follows the state standards for social studies. In grades K-2, the curriculum will focus on students' ability to describe basic historical events, people, and conflicts. They will begin to understand their own culture by studying examples of their community and school, and places around the world. Students will become familiar with basic geographical representations, economic concepts and resources, and functions of government. In grades 3-5, the curriculum will help students describe historical events in more detail. They will also be able to communicate how these events impacted other historical occurrences. In grades 6-8, students will practice connecting events in U.S. and world history with current events and learn about relationships among geography, history, economics, and culture.

The following pages offer a sample course scope and sequence for ELA in grades 1, 4, and 7; math in grades kindergarten, 3, and 8; and, our character development (moral focus) resources in grades 1, 4, and 7. Additional information on other subjects or grade levels is available upon request.

Sample Scope & Sequence

Oak Grove Charter Academy

FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 1				
	Reading	Writing	Speaking and Listening	Language
Year Long Curriculum Plan by Quarter	<p>Key Ideas and Details RI.1.1 and RL.1.1 Ask and answer questions about key details.</p> <p>RI.1.2 Identify the main topic and retell key details of a text.</p> <p>RL.1.3 Describe characters, settings, and major events in a story, using key details.</p> <p>RI.1.3 Describe the connection between two individuals, events, ideas, or pieces of information in a text.</p> <p>RL.1.2 Retell stories, including key details, and demonstrate understanding of their central message or</p> <p>Craft and Structure RI.1.4 Ask and answer questions to help determine or clarify the meaning of words and phrases in a text.</p> <p>RI.1.7 Use the illustrations and details in a text to describe its key ideas.</p> <p>Print Concepts RF.1.2 Demonstrate understanding of spoken words, syllables, and sounds (phonemes).</p> <p>a. Distinguish long from short vowel sounds in spoken single-syllable words.</p> <p>b. Orally produce single-syllable words by blending sounds (phonemes), including consonant blends.</p> <p>c. Isolate and pronounce initial, medial vowel, and final sounds (phonemes) in spoken single-syllable words.</p>	<p>Text Types and Purposes W.1.1 Write opinion pieces in which they introduce the topic or name the book they are writing about, state an opinion, supply a reason for the opinion, and provide some sense of closure.</p>	<p>Comprehension and Collaboration SL.1.3 Ask and answer questions about what a speaker says in order to gather additional information or clarify something that is not understood.</p>	<p>Vocabulary Acquisition and Use L.K.4 Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on kindergarten reading and content.</p> <p>a. Identify new meanings for familiar words and apply them accurately (e.g., knowing duck is a bird and learning the verb to duck).</p> <p>b. Use the most frequently occurring inflections and affixes (e.g., -ed, -s, re-, un-, pre-, -ful, -less) as a clue to the meaning of an unknown word.</p> <p>Conventions of Standard English L.1.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.</p> <p>a. Print all upper- and lowercase letters.</p> <p>b. Use common, proper, and possessive nouns.</p> <p>c. Use singular and plural nouns with matching verbs in basic sentences (e.g., He hops; We hop).</p> <p>d. Use personal, possessive, and indefinite pronouns (e.g., I, me, my; they, them, their, anyone, everything).</p> <p>e. Use verbs to convey a sense of past, present, and future (e.g., Yesterday I walked home; Today I walk home; Tomorrow I will walk home).</p> <p>f. Use frequently occurring adjectives.</p> <p>h. Use determiners (e.g., articles, demonstratives).</p>

FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

<p>d. Segment spoken single-syllable words into their complete sequence of individual sounds (phonemes).</p> <p>Phonological Awareness RF.1.1 Demonstrate understanding of the organization and basic features of print.</p> <p>a. Recognize the distinguishing features of a sentence (e.g., first word, capitalization, ending).</p> <p>RF.1.3 Know and apply grade-level phonics and word analysis skills in decoding words.</p> <p>a. Know the spelling-sound correspondences for common consonant digraphs (two letters that represent one sound).</p> <p>b. Decode regularly spelled one-syllable words.</p> <p>c. Know final -e and common vowel team conventions for representing long vowel sounds.</p> <p>d. Use knowledge that every syllable must have a vowel sound to determine the number of syllables in a printed word.</p> <p>e. Decode two-syllable words following basic patterns by breaking the words into syllables.</p> <p>f. Read words with inflectional endings.</p> <p>g. Recognize and read grade-appropriate irregularly spelled.</p>			<p>i. Use frequently occurring prepositions (e.g., during, beyond, toward).</p> <p>j Produce and expand complete simple and compound declarative, interrogative, imperative, and exclamatory sentences in response to prompts.</p> <p>L.1.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p>a Capitalize dates and names of people.</p> <p>b Use end punctuation for sentences.</p> <p>c Use commas in dates and to separate single words in a series.</p> <p>d Use conventional spelling for words with common spelling patterns and for frequently occurring irregular words.</p> <p>e Spell untaught words phonetically, drawing on phonemic awareness and spelling conventions.</p> <p>Vocabulary Acquisition and Use L.1.4 Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 1 reading and content, choosing flexibly from an array of strategies.</p> <p>a Use sentence-level context as a clue to the meaning of a word or phrase.</p> <p>b Use frequently occurring affixes as a clue to the meaning of a word.</p> <p>c Identify frequently occurring root words (e.g., look) and their inflectional forms.</p>
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FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 2				
	Reading	Writing	Speaking and Listening	Language
Year Long Curriculum Plan by Quarter	<p>Key Ideas and Details RI.1.1 and RL.1.1 Ask and answer questions about key details.</p> <p>RL.1.2 Retell stories, including key details, and demonstrate understanding of their central message.</p> <p>RI.1.3 Describe the connection between two individuals, events, ideas, or pieces of information in a text.</p> <p>RL.1.3 Describe characters, settings, and major events in a story, using key details.</p> <p>Craft and Structure RI.1.4 Ask and answer questions to help determine or clarify the meaning of words and phrases in a text.</p> <p>RL.1.4 Identify words and phrases in stories or poems that suggest feelings or appeal to the senses.</p> <p>RL.1.5 Explain major differences between books that tell stories and books that give information, drawing on a wide reading of a range of text types.</p> <p>RI.1.5 Know and use various text features (e.g., headings, tables of contents, glossaries, electronic menus, icons) to locate key facts or information in a text.</p> <p>Integration of Knowledge and Ideas RI.1.7 Use the illustrations and details in a text to describe its key ideas.</p>	<p>Text Types and Purposes W.1.1 Write opinion pieces in which they introduce the topic or name the book they are writing about, state an opinion, supply a reason for the opinion, and provide some sense of closure.</p> <p>W.1.2 Write informative/explanatory texts in which they name a topic, supply some facts about the topic, and provide some sense of closure.</p> <p>Production and Distribution of Writing W.1.5 With guidance and support from adults, focus on a topic, respond to questions and suggestions from peers, and add details to strengthen writing as needed.</p>	<p>Comprehension and Collaboration SL.1.2 Ask and answer questions about key details in a text read aloud or information presented orally or through other media.</p> <p>SL.1.1 Participate in collaborative conversations with diverse partners about grade 1 topics and texts with peers and adults in small and larger groups.</p> <p>a Follow agreed-upon rules for discussions (e.g., listening to others with care, speaking one at a time about the topics and texts under discussion).</p> <p>b Build on others' talk in conversations by responding to the comments of others through multiple exchanges.</p> <p>c Ask questions to clear up any confusion about the topics and texts under discussion</p>	<p>Vocabulary Acquisition and Use L.1.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p>a Capitalize dates and names of people.</p> <p>b Use end punctuation for sentences.</p> <p>c Use commas in dates and to separate single words in a series.</p> <p>d Use conventional spelling for words with common spelling patterns and for frequently occurring irregular words.</p> <p>e Spell untaught words phonetically, drawing on phonemic awareness and spelling conventions.</p> <p>L.1.5 With guidance and support from adults, demonstrate understanding of word relationships and nuances in word meanings.</p> <p>a Sort words into categories (e.g., colors, clothing) to gain a sense of the concepts the categories represent.</p> <p>b Define words by category and by one or more key attributes (e.g., a duck is a bird that swims; a tiger is a large cat with stripes).</p> <p>c Identify real-life connections between words and their use (e.g., note places at home that are cozy).</p>

FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

<p>RL.1.7 Use illustrations and details in a story to describe its characters, setting, or events.</p> <p>Reading Foundational Skills Phonics and Word recognition RF.1.4 Read with sufficient accuracy and fluency to support comprehension.</p> <p>a. Read grade-level text with purpose and understanding.</p> <p>b. Read grade-level text orally with accuracy, appropriate rate, and expression.</p> <p>c. Use context to confirm or self-correct word recognition and understanding, rereading as necessary.</p>			<p>d Distinguish shades of meaning among verbs differing in manner (e.g., look, peek, glance, stare, glare, scowl) and adjectives differing in intensity (e.g., large, gigantic) by defining or choosing them or by acting out the meanings .</p>
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FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 3				
	Reading	Writing	Speaking and Listening	Language
Year Long Curriculum Plan by Quarter	<p>Key Ideas and Details RI.1.1 and RL.1.1 Ask and answer questions about key details.</p> <p>RI.1.2 Identify the main topic and retell key details of a text.</p> <p>RL.1.2 Retell stories, including key details, and demonstrate understanding of their central message or main idea.</p> <p>RL.1.3 Describe characters, settings, and major events in a story, using key details.</p> <p>RI.1.3 Describe the connection between two individuals, events, ideas, or pieces of information in a text.</p> <p>Craft and Structure RI.1.4 Ask and answer questions to help determine or clarify the meaning of words and phrases in a text.</p> <p>RL.1.6 Identify who is telling the story at various points in a text.</p> <p>RI.1.6 Distinguish between information provided by pictures or other illustrations and information provided by the words in a text.</p> <p>Integration of Knowledge and Ideas RI.1.7 Use the illustrations and details in a text to describe its key ideas.</p> <p>RL.1.7 Use illustrations and details in a story to describe its characters, setting, or events.</p>	<p>Text Types and Purposes W.1.1 Write opinion pieces in which they introduce the topic or name the book they are writing about, state an opinion, supply a reason for the opinion, and provide some sense of closure.</p> <p>W.1.2 Write informative/explanatory texts in which they name a topic, supply some facts about the topic, and provide some sense of closure.</p> <p>Production and Distribution of Writing W.1.5 With guidance and support from adults, focus on a topic, respond to questions and suggestions from peers, and add details to strengthen writing as needed.</p>	<p>Comprehension and Collaboration SL.1.2 Ask and answer questions about key details in a text read aloud or information presented orally or through other media.</p> <p>SL.1.1 Participate in collaborative conversations with diverse partners about grade 1 topics and texts with peers and adults in small and larger groups.</p> <p>a. Follow agreed-upon rules for discussions (e.g., listening to others with care, speaking one at a time about the topics and texts under discussion).</p> <p>b. Build on others' talk in conversations by responding to the comments of others through multiple exchanges.</p> <p>c. Ask questions to clear up any confusion about the topics and texts under discussion.</p>	<p>Conventions of Standard English L.1.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.</p> <p>a Print all upper- and lowercase letters.</p> <p>b Use common, proper, and possessive nouns.</p> <p>c Use singular and plural nouns with matching verbs in basic sentences (e.g., He hops; We hop).</p> <p>d Use personal, possessive, and indefinite pronouns (e.g., I, me, my; they, them, their, anyone, everything).</p> <p>e Use verbs to convey a sense of past,</p> <p>Vocabulary Acquisition and Use L.1.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p>a. Capitalize dates and names of people.</p> <p>b. Use end punctuation for sentences.</p> <p>c. Use commas in dates and to separate single words in a series.</p> <p>d. Use conventional spelling for words with common spelling patterns and for frequently occurring irregular words.</p>

FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

<p>Reading Foundational Skills Fluency RF.1.4 Read with sufficient accuracy and fluency to support comprehension.</p> <p>a. Read grade-level text with purpose and understanding.</p> <p>b. Read grade-level text orally with accuracy, appropriate rate, and expression.</p> <p>c. Use context to confirm or self-correct word recognition and understanding, rereading as necessary.</p>			<p>e. Spell untaught words phonetically, drawing on phonemic awareness and spelling conventions.</p> <p>L.1.5 With guidance and support from adults, demonstrate understanding of word relationships and nuances in word meanings.</p> <p>a. Sort words into categories (e.g., colors, clothing) to gain a sense of the concepts the categories represent.</p> <p>b. Define words by category and by one or more key attributes (e.g., a duck is a bird that swims; a tiger is a large cat with stripes).</p> <p>c. Identify real-life connections between words and their use (e.g., note places at home that are cozy).</p> <p>d. Distinguish shades of meaning among verbs differing in manner (e.g., look, peek, glance, stare, glare, scowl) and adjectives differing in intensity (e.g., large, gigantic) by defining or choosing them or by acting out the meanings.</p>
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FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 4					
	Reading	Writing	Speaking and Listening	Language	
Year Long Curriculum Plan by Quarter	<p>Key Ideas and Details RI.1.1 and RL.1.1 Ask and answer questions about key details.</p>	<p>W.1.7 Participate in shared research and writing projects (e.g., explore a number of “how-to” books on a given topic and use them to write a sequence of instructions).</p>	<p>Presentation of Knowledge and Ideas SL.1.5 Add drawings or other visual displays to descriptions when appropriate to clarify ideas, thoughts, and feelings</p>	<p>Conventions of Standard English L.1.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.</p>	
	<p>Craft and Structure RI.1.4 Ask and answer questions to help determine or clarify the meaning of words and phrases in a text.</p>	<p>W.1.8 With guidance and support from adults, recall information from experiences or gather information from provided sources to answer a question.</p>	<p>SL.1.6 Produce complete sentences when appropriate to task and situation. (See grade 1 Language standards 1 and 3 on page 26 for specific expectations.)</p>	<p>a. Print all upper- and lowercase letters.</p>	
	<p>Integration of Knowledge and Ideas RL.1.9 Compare and contrast the adventures and experiences of characters in stories.</p>			<p>b. Use common, proper, and possessive nouns.</p>	
	<p>RI.1.10 With prompting and support, read prose and poetry of appropriate complexity for grade 1.</p>			<p>c. Use singular and plural nouns with matching verbs in basic sentences (e.g., He hops; We hop).</p>	
	<p>RI.1.9 Identify basic similarities in and differences between two texts on the same topic (e.g., in illustrations, descriptions, or procedures).</p>			<p>d. Use personal, possessive, and indefinite pronouns (e.g., I, me, my; they, them, their, anyone, everything).</p>	
	<p>RI.1.10 With prompting and support, read informational texts appropriately complex for grade 1.</p>			<p>e Use verbs to convey a sense of past.</p>	
	<p>RF.1.4 Read with sufficient accuracy and fluency to support comprehension.</p>			<p>L.1.6 Use words and phrases acquired through conversations, reading and being read to, and responding to texts, including using frequently occurring conjunctions to signal simple relationships (e.g., I named my hamster Nibbles because she nibbles too much because she likes that.</p>	
	<p>a. Read grade-level text with purpose and understanding.</p>				
	<p>b. Read grade-level text orally with accuracy, appropriate rate, and expression.</p>				
	<p>c. Use context to confirm or self-correct word recognition and understanding, rereading as necessary.</p>				

FIRST GRADE ELA SAMPLE SCOPE AND SEQUENCE

Objectives Assessed Throughout the Year

RI.1.1 and RL.1. 1 Ask and answer questions about key details.

RI.1.4 Ask and answer questions to help determine or clarify the meaning of words and phrases in a text.

W.1.1 Write opinion pieces in which they introduce the topic or name the book they are writing about, state an opinion, supply a reason for the opinion, and provide some sense of closure.

L.1.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.

a. Print all upper- and lowercase letters.

b. Use common, proper, and possessive nouns.

c. Use singular and plural nouns with matching verbs in basic sentences (e.g., He hops; We hop).

d. Use personal, possessive, and indefinite pronouns (e.g., I, me, my; they, them, their, anyone, everything).

e. Use verbs to convey a sense of past, present, and future (e.g., Yesterday I walked home; Today I walk home; Tomorrow I will walk home).

f. Use frequently occurring adjectives.

h. Use determiners (e.g., articles, demonstratives).

i. Use frequently occurring prepositions (e.g., during, beyond, toward).

j. Produce and expand complete simple and compound declarative, interrogative, imperative, and exclamatory sentences in response to prompts.

GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 1				
	Reading	Writing	Speaking and Listening	Language
Year Long Curriculum Plan by Quarter	<p>Key Ideas and Details RL.4.1 Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.</p> <p>RL.4.2 Determine a theme of a story, drama, or poem from details in the text; summarize the text</p> <p>RL.4.3 Describe in depth a character, setting, or event in a story or drama, drawing on specific details in the text (e.g., a character's thoughts, words, or actions).</p> <p>Craft and Structure RI.4.4 Determine the meaning of general academic and domain-specific words or phrases in a text relevant to a grade 4 topic or subject area.</p> <p>RI.4.5 Describe the overall structure (e.g., chronology, comparison, cause/effect, problem/solution) of events, ideas, concepts, or information in a text or part of a text. Integration of Knowledge and Ideas</p>	<p>Text Types and Purposes W.4.3 Write narratives to develop real or imagined experiences or events using effective technique, descriptive details, and clear event sequences.</p> <ol style="list-style-type: none"> Orient the reader by establishing a situation and introducing a narrator and/or characters; organize an event sequence that unfolds naturally. Use dialogue and description to develop experiences and events or show the responses of characters to situations. Use a variety of transitional words and phrases to manage the sequence of events. Use concrete words and phrases and sensory details to convey experiences and events precisely. Provide a conclusion that follows from the narrated experiences or events. <p>Production and Distribution of Writing W.4.4. Produce clear and coherent writing in which the development and organization are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)</p>	<p>Comprehension and Collaboration SL.4.1 Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on <i>grade 4 topics and texts</i>, building on others' ideas and expressing their own clearly.</p> <ol style="list-style-type: none"> Come to discussions prepared, having read or studied required material; explicitly draw on that preparation and other information known about the topic to explore ideas under discussion. Follow agreed-upon rules for discussions and carry out assigned roles. Pose and respond to specific questions to clarify or follow up on information, and make comments that contribute to the discussion and link to the remarks of others. Review the key ideas expressed and explain their own ideas and understanding in light of the discussion. <p>SL.4.2 Paraphrase portions of a text read aloud or information presented in diverse media and formats, including visually, quantitatively, and orally.</p>	<p>Conventions of Standard English L.4.1 Use relative pronouns (who, whose, whom, which, that) and relative adverbs (where, when, why).</p> <p>L.4.1 Form and use the progressive (e.g., I was walking; I am walking; I will be walking) verb tenses.</p> <p>L.4.2 Use correct capitalization.</p> <p>Knowledge of Language L.4.3 Choose words and phrases to convey ideas precisely.</p> <p>Vocabulary Acquisition and Use L.4.4 Use context (e.g., definitions, examples, or restatements in text) as a clue to the meaning of a word or phrase.</p> <p>L.4.5 Explain the meaning of simple similes and metaphors (e.g., as pretty as a picture) in context.</p>

GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

		<p>W.4.5 With guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, and editing. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grade 4.)</p> <p>W.4.6 With some guidance and support from adults, use technology, including the Internet, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of one page in one sitting.</p> <p>Research to Build and Present Knowledge</p> <p>W.4.7 Conduct short research projects that build knowledge through investigation of different aspects of a topic.</p>		
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GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 2				
	Reading	Writing	Speaking and Listening	Language
Year Long Curriculum Plan by Quarter	<p>Key Ideas and Details RI.4.1 Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.</p> <p>RI.4.2 Determine the main idea of a text and explain how it is supported by key details; summarize the text.</p> <p>RI.4.3 Explain events, procedures, ideas, or concepts in a historical, scientific, or technical text, including what happened and why, based on specific information in the text.</p> <p>Craft and Structure RI.4.4 Determine the meaning of general academic and domain-specific words or phrases in a text relevant to a grade 4 topic or subject area.</p> <p>RI.4.5 Explain major differences between poems, drama, and prose, and refer to the structural elements of poems (e.g., verse, rhythm, meter) and drama (e.g., casts of characters, settings, descriptions, dialogue, stage directions) when writing or speaking about a text.</p> <p>Integration of Knowledge and Ideas RI.4.7 Interpret information presented visually, orally, or quantitatively (e.g., in charts, graphs, diagrams, time lines, animations, or interactive elements on Web pages) and explain how the information contributes to an understanding of the text in which it appears.</p>	<p>Text Types and Purposes W.4.2 Write informative/explanatory texts to examine a topic and convey ideas and information clearly.</p> <ul style="list-style-type: none"> a. Introduce a topic clearly and group related information in paragraphs and sections; include formatting (e.g., headings), illustrations, and multimedia when useful to aiding comprehension. b. Develop the topic with facts, definitions, concrete details, quotations, or other information and examples related to the topic. c. Link ideas within categories of information using words and phrases (e.g., another, for example, also, because). d. Use precise language and domain-specific vocabulary to inform about or explain the topic. e. Provide a concluding statement or section related to the information or explanation presented. <p>Production and Distribution of Writing W.4.4. Produce clear and coherent writing in which the development and organization are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)</p>	<p>Comprehension and Collaboration SL.4.3 Identify the reasons and evidence a speaker provides to support particular points.</p>	<p>Conventions of Standard English L.4.1 Use modal auxiliaries (e.g., can, may, must) to convey various conditions.</p> <p>L.4.1 Order adjectives within sentences according to conventional patterns (e.g., a small red bag rather than a red small bag).</p> <p>L.4.2 Use commas and quotation marks to mark direct speech and quotations from a text.</p> <p>Knowledge of Language L.4.3 Choose punctuation for effect.</p> <p>Vocabulary Acquisition and Use L.4.4 Use common, grade-appropriate Greek and Latin affixes and roots as clues to the meaning of a word (e.g., telegraph, photograph, autograph).</p> <p>L.4.5 Recognize and explain the meaning of common idioms, adages, and proverbs.</p>

GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

		<p>W.4.5 With guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, and editing. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grade 4.)</p> <p>W.4.6 With some guidance and support from adults, use technology, including the Internet, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of one page in one sitting.</p> <p>Research to Build and Present Knowledge</p> <p>W.4.8. Recall relevant information from experiences or gather relevant information from print and digital sources; take notes and categorize information, and provide a list of sources.</p>		
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GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 3				
	Reading	Writing	Speaking and Listening	Language
Year Long Curriculum Plan by Quarter	<p>Key Ideas and Details RL.4.1 Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.</p> <p>RL.4.2 Determine a theme of a story, drama, or poem from details in the text; summarize the text</p> <p>RL.4.3 Describe in depth a character, setting, or event in a story or drama, drawing on specific details in the text (e.g., a character’s thoughts, words, or actions).</p> <p>Craft and Structure RI.4.6 Compare and contrast a firsthand and secondhand account of the same event or topic; describe the differences in focus and the information provided.</p> <p>Integration of Knowledge and Ideas RL.4.7 Make connections between the text of a story or drama and a visual or oral presentation of the text, identifying where each version reflects specific descriptions and directions in the text.</p> <p>RI.4.9 Integrate information from two texts on the same topic in order to write or speak about the subject knowledgeably.</p>	<p>Text Types and Purposes W.4.2 Write informative/explanatory texts to examine a topic and convey ideas and information clearly.</p> <ol style="list-style-type: none"> Introduce a topic clearly and group related information in paragraphs and sections; include formatting (e.g., headings), illustrations, and multimedia when useful to aiding comprehension. Develop the topic with facts, definitions, concrete details, quotations, or other information and examples related to the topic. Link ideas within categories of information using words and phrases (e.g., another, for example, also, because). Use precise language and domain-specific vocabulary to inform about or explain the topic. Provide a concluding statement or section related to the information or explanation presented. <p>Production and Distribution of Writing W.4.4. Produce clear and coherent writing in which the development and organization are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)</p>	<p>Presentation of Knowledge and Ideas SL.4.4 Report on a topic or text, tell a story, or recount an experience in an organized manner, using appropriate facts and relevant, descriptive details to support main ideas or themes; speak clearly at an understandable pace.</p> <p>SL.4.5 Add audio recordings and visual displays to presentations when appropriate to enhance the development of main ideas or themes.</p>	<p>Conventions of Standard English L.4.1 Form and use prepositional phrases.</p> <p>L.4.1 Produce complete sentences, recognizing and correcting inappropriate fragments and run-ons.</p> <p>L.4.1 Correctly use frequently confused words (e.g., to, too, two; there, their).</p> <p>L.4.2 Use a comma before a coordinating conjunction in a compound sentence.</p> <p>Knowledge of Language L.4.3 Choose punctuation for effect.</p> <p>Vocabulary Acquisition and Use L.4.4 Consult reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation and determine or clarify the precise meaning of key words and phrases.</p> <p>L.4.5 Demonstrate understanding of words by relating them to their opposites (antonyms) and to words with similar but not identical meanings (synonyms).</p>

GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

		<p>W.4.5 With guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, and editing. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grade 4.)</p> <p>W.4.6 With some guidance and support from adults, use technology, including the Internet, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of one page in one sitting.</p> <p>Research to Build and Present Knowledge</p> <p>W.4.9 Draw evidence from literary or informational texts to support analysis, reflection, and research.</p> <p>a. Apply grade 4 Reading standards to literature (e.g., “Describe in depth a character, setting, or event in a story or drama, drawing on specific details in the text [e.g., a character’s thoughts, words, or actions].”).</p>		
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GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

QUARTER 4					
	Reading	Writing		Speaking and Listening	Language
Year Long Curriculum Plan by Quarter	<p>Key Ideas and Details RI.4.1 Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.</p> <p>RI.4.2 Determine the main idea of a text and explain how it is supported by key details; summarize the text.</p> <p>RI.4.3 Explain events, procedures, ideas, or concepts in a historical, scientific, or technical text, including what happened and why, based on specific information in the text.</p> <p>Craft and Structure RL.4.4 Determine the meaning of words and phrases as they are used in a text, including those that allude to significant characters found in mythology (e.g., Herculean).</p> <p>RI.4.5 Describe the overall structure (e.g., chronology, comparison, cause/effect, problem/solution) of events, ideas, concepts, or information in a text or part of a text.</p> <p>RL.4.6 Compare and contrast the point of view from which different stories are narrated, including the difference between first- and third-person narrations.</p>	<p>Text Types and Purposes W.4.1 Write opinion pieces on topics or texts, supporting a point of view with reasons and information.</p> <p>a. Introduce a topic or text clearly, state an opinion, and create an organizational structure in which related ideas are grouped to support the writer’s purpose.</p> <p>b. Provide reasons that are supported by facts and details.</p> <p>c. Link opinion and reasons using words and phrases (e.g., for instance, in order to, in addition).</p> <p>d. Provide a concluding statement or section related to the opinion presented.</p> <p>W.4.3 Write narratives to develop real or imagined experiences or events using effective technique, descriptive details, and clear event sequences.</p> <p>a. Orient the reader by establishing a situation and introducing a narrator and/or characters; organize an event sequence that unfolds naturally.</p> <p>b. Use dialogue and description to develop experiences and events or show the responses of characters to situations.</p> <p>c. Use a variety of transitional words and phrases to manage the sequence of events.</p> <p>d. Use concrete words and phrases and sensory details to convey experiences and events precisely.</p> <p>e. Provide a conclusion that follows from the narrated experiences or events.</p>		<p>Presentation of Knowledge and Ideas SL.4.6 Differentiate between contexts that call for formal English (e.g., presenting ideas) and situations where informal discourse is appropriate (e.g., small-group discussion); use formal English when appropriate to task and situation.</p>	<p>Conventions of Standard English L.4.1. Form and use the progressive (e.g., I was walking; I am walking; I will be walking) verb tenses.</p> <p>L.4.1 Form and use prepositional phrases.</p> <p>L.4.1 Produce complete sentences, recognizing and correcting inappropriate fragments and run-ons.</p> <p>L.4.2 Use correct capitalization.</p> <p>L.4.2 Spell grade-appropriate words correctly, consulting references as needed.</p> <p>Knowledge of Language L.4.4 Use context (e.g., definitions, examples, or restatements in text) as a clue to the meaning of a word or phrase.</p> <p>Vocabulary Acquisition and Use L.4.6 Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases, including those that signal precise actions, emotions, or states of being (e.g., quizzed, whined, stammered) and that are based on a particular topic (e.g., <i>wildlife, conservation, and endangered</i> when discussing animal preservation).</p>

GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

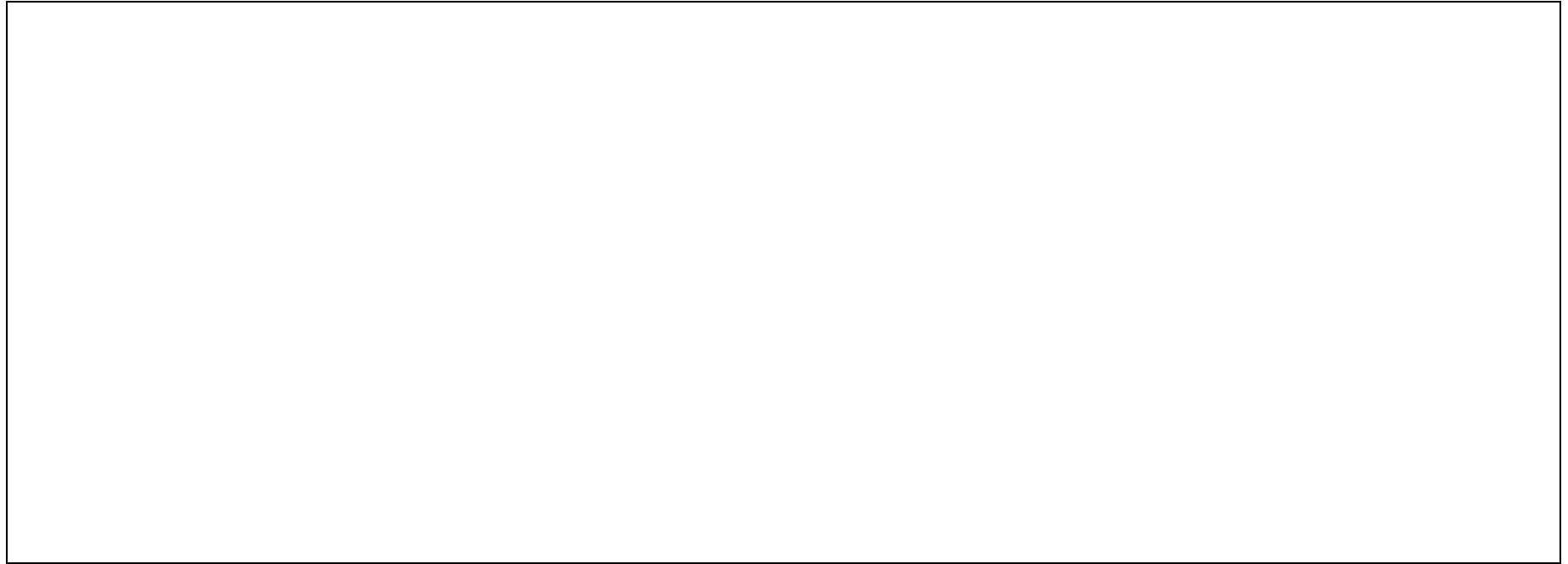
<p>Integration of Knowledge and Ideas RI.4.7 Interpret information presented visually, orally, or quantitatively (e.g., in charts, graphs, diagrams, time lines, animations, or interactive elements on Web pages) and explain how the information contributes to an understanding of the text in which it appears.</p> <p>RI.4.8 Explain how an author uses reasons and evidence to support particular points in a text.</p> <p>RI.4.9 Compare and contrast the treatment of similar themes and topics (e.g., opposition of good and evil) and patterns of events (e.g., the quest) in stories, myths, and traditional literature from different cultures.</p>	<p>Production and Distribution of Writing W.4.4. Produce clear and coherent writing in which the development and organization are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)</p> <p>W.4.5 With guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, and editing. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grade 4.)</p> <p>W.4.6 With some guidance and support from adults, use technology, including the Internet, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of one page in one sitting.</p> <p>Research to Build and Present Knowledge W.4.9. Draw evidence from literary or informational texts to support analysis, reflection, and research. b. Apply grade 4 Reading standards to informational texts (e.g., “Explain how an author uses reasons and evidence to support particular points in a text”).</p>		
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GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE

Objectives Assessed Throughout the Year

- RL.4.10** By the end of the year, read and comprehend literature, including stories dramas, and poetry, in the grades 4–5 text complexity band proficiently, with scaffolding as needed at the high end of the range.
- RI.4.10** By the end of year, read and comprehend informational texts, including history/social studies, science, and technical texts, in the grades 4–5 text complexity band proficiently, with scaffolding as needed at the high end of the range.
- RF.4.3** Know and apply grade-level phonics and word analysis skills in decoding words.
- a. Use combined knowledge of all letter-sound correspondences, syllabication patterns, and morphology (e.g., roots and affixes) to read accurately unfamiliar multisyllabic words in context and out of context.
- RF.4.4** Read with sufficient accuracy and fluency to support comprehension.
- a. Read on-level text with purpose and understanding.
 - b. Read on-level prose and poetry orally with accuracy, appropriate rate, and expression on successive readings.
 - c. Use context to confirm or self-correct word recognition and understanding, rereading as necessary.
- W.4.10** Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.

GRADE FOUR ELA SAMPLE SCOPE AND SEQUENCE



GRADE SEVEN ELA SCOPE AND SEQUENCE

QUARTER 1					
Reading		Writing	Speaking and Listening	Language	
Unit 1					
Year Long Curriculum Plan by Quarter	Key Ideas and Details RL.7.1 Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text. RL.7.2 Determine a theme or central idea of a text and analyze its development over the course of the text; provide an objective summary of the text. Craft and Structure RL.7.4 Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of rhymes and other repetitions of sounds (e.g., alliteration) on a specific verse or stanza of a poem or section of a story or drama.		Research to Build and Present Knowledge W.7.9 Draw evidence from literary or informational texts to support analysis, reflection, and research. a. Apply grade 7 Reading standards to literature (e.g., "Determine a theme or central idea of a text and analyze its development over the course of the text").	Comprehension and Collaboration SL.7.1 Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grade 7 topics, texts, and issues, building on others' ideas and expressing their own clearly. a. Come to discussions prepared, having read or researched material under study; explicitly draw on that preparation by referring to evidence on the topic, text, or issue to probe and reflect on ideas under discussion. b. Follow rules for collegial discussions, track progress toward specific goals and deadlines, and define individual roles as needed. c. Pose questions that elicit elaboration and respond to others' questions and comments with relevant observations and ideas that bring the discussion back on topic as needed. d. Acknowledge new information expressed by others and, when warranted, modify their own views.	Conventions of Standard English L.7.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. b. Choose among simple, compound, complex, and compound-complex sentences to signal differing relationships among ideas. L.7.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. b. Spell correctly. Vocabulary Acquisition and Use L.7.4 Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 7 reading and content, choosing flexibly from a range of strategies. a. Use context (e.g., the overall meaning of a sentence or paragraph; a word's position or function in a sentence) as a clue to the meaning of a word or phrase. b. Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., belligerent, bellicose, rebel).

GRADE SEVEN ELA SCOPE AND SEQUENCE

Unit 2			
<p>Key Ideas and Details RI.7.1 Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text. RI.7.2 Determine two or more central ideas in a text and analyze their development over the course of the text; provide an objective summary of the text. Craft and Structure RI.7.3 Analyze the interactions between individuals, events, and ideas in a text (e.g., how ideas influence individuals or events, or how individuals influence ideas or events). RI.7.4 Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; analyze the impact of a specific word choice on meaning and tone.</p>	<p>Research to Build and Present Knowledge W.7.7 Conduct short research projects to answer a question, drawing on several sources and generating additional related, focused questions for further research and investigation. W.7.8 Gather relevant information from multiple print and digital sources, using search terms effectively; assess the credibility and accuracy of each source; and quote or paraphrase the data and conclusions of others while avoiding plagiarism and following a standard format for citation.</p>	<p>Comprehension and Collaboration SL.7.2 Analyze the main ideas and supporting details presented in diverse media and formats (e.g., visually, quantitatively, orally) and explain how the ideas clarify a topic, text, or issue under study.</p>	<p>Conventions of Standard English L.7.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. b. Choose among simple, compound, complex, and compound-complex sentences to signal differing relationships among ideas. L.7.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. b. Spell correctly. Vocabulary Acquisition and Use L.7.4 Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 7 reading and content, choosing flexibly from a range of strategies. a. Use context (e.g., the overall meaning of a sentence or paragraph; a word's position or function in a sentence) as a clue to the meaning of a word or phrase. b. Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., belligerent, bellicose, rebel).</p>

GRADE SEVEN ELA SCOPE AND SEQUENCE

QUARTER 2					
Reading		Writing		Speaking and Listening	Language
Unit 3					
Year Long Curriculum Plan by Quarter	<p>Key Ideas and Details</p> <p>RL.7.1 Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.</p>	<p>Text Types and Purposes</p> <p>W.7.3 Write narratives to develop real or imagined experiences or events using effective technique, relevant descriptive details, and well-structured event sequences.</p>			<p>Conventions of Standard English</p> <p>L.7.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.</p> <p>a. Explain the function of phrases and clauses in general and their function in specific sentences.</p>
	<p>Craft and Structure</p> <p>RL.7.4 Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of rhymes and other repetitions of sounds (e.g., alliteration) on a specific verse or stanza of a poem or section of a story or drama.</p>	<p>a. Engage and orient the reader by establishing a context and point of view and introducing a narrator and/or characters; organize an event sequence that unfolds naturally and logically.</p>			<p>L.7.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p>b. Spell correctly.</p>
	<p>RL.7.5 Analyze how a drama’s or poem’s form or structure (e.g., soliloquy, sonnet) contributes to its meaning.</p>	<p>b. Use narrative techniques, such as dialogue, pacing, and description, to develop experiences, events, and/or characters.</p>			<p>Vocabulary Acquisition and Use</p> <p>L.7.4 Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 7 reading and content, choosing flexibly from a range of strategies.</p>
	<p>Integration of Knowledge and Ideas</p> <p>RL.7.7 Compare and contrast a written story, drama, or poem to its audio, filmed, staged, or multimedia version, analyzing the effects of techniques unique to each medium (e.g., lighting, sound, color, or camera focus and angles in a film).</p>	<p>c. Use a variety of transition words, phrases, and clauses to convey sequence and signal shifts from one time frame or setting to another.</p>			<p>b. Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., belligerent, bellicose, rebel).</p>
		<p>d. Use precise words and phrases, relevant descriptive details, and sensory language to capture the action and convey experiences and events.</p>			<p>c. Consult general and specialized reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation of a word or determine or clarify its precise meaning or its part of speech.</p>
		<p>e. Provide a conclusion that follows from and reflects on the narrated experiences or events.</p>			

GRADE SEVEN ELA SCOPE AND SEQUENCE

			<p>L.7.5 Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.</p> <ul style="list-style-type: none"> a. Interpret figures of speech (e.g., literary, biblical, and mythological allusions) in context. b. Use the relationship between particular words (e.g., synonym/antonym, analogy) to better understand each of the words.
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GRADE SEVEN ELA SCOPE AND SEQUENCE

Unit 4			
<p>Key Ideas and Details RI.7.1 Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.</p> <p>Craft and Structure RI.7.4 Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; analyze the impact of a specific word choice on meaning and tone.</p> <p>RI.7.5 Analyze the structure an author uses to organize a text, including how the major sections contribute to the whole and to the development of the ideas.</p> <p>Integration of Knowledge and Ideas RL.7.9 Compare and contrast a fictional portrayal of a time, place, or character and a historical account of the same period as a means of understanding how authors of fiction use or alter history.</p>	<p>W.7.9 Draw evidence from literary or informational texts to support analysis, reflection, and research.</p> <p>b. Apply grade 7 Reading standards to literary nonfiction (e.g. “Trace and evaluate the argument and specific claims in a text, assessing whether the reasoning is sound and the evidence is relevant and sufficient to support the claims”).</p>	<p>Comprehension and Collaboration SL.7.1 Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grade 7 topics, texts, and issues, building on others’ ideas and expressing their own clearly.</p> <p>a. Come to discussions prepared, having read or researched material under study; explicitly draw on that preparation by referring to evidence on the topic, text, or issue to probe and reflect on ideas under discussion.</p> <p>b. Follow rules for collegial discussions, track progress toward specific goals and deadlines, and define individual roles as needed.</p> <p>c. Pose questions that elicit elaboration and respond to others’ questions and comments with relevant observations and ideas that bring the discussion back on topic as needed.</p> <p>d. Acknowledge new information expressed by others and, when warranted, modify their own views.</p>	<p>Conventions of Standard English L.7.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.</p> <p>a. Explain the function of phrases and clauses in general and their function in specific sentences.</p> <p>L.7.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p>b. Spell correctly.</p> <p>Vocabulary Acquisition and Use L.7.4 Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 7 reading and content, choosing flexibly from a range of strategies.</p> <p>b. Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., belligerent, bellicose, rebel).</p> <p>c. Consult general and specialized reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation of a word or determine or clarify its precise meaning or its part of speech.</p> <p>L.7.5 Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.</p> <p>a. Interpret figures of speech (e.g., literary, biblical, and mythological allusions) in context.</p>

GRADE SEVEN ELA SCOPE AND SEQUENCE

				b. Use the relationship between particular words (e.g., synonym/antonym, analogy) to better understand each of the words.
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GRADE SEVEN ELA SCOPE AND SEQUENCE

QUARTER 3					
Reading		Writing	Speaking and Listening	Language	
Unit 5					
Year Long Curriculum Plan by Quarter	Key Ideas and Details	Research to Build and Present Knowledge	Comprehension and Collaboration	Conventions of Standard English	
	RL.7.1 Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.	W.7.9 Draw evidence from literary or informational texts to support analysis, reflection, and research.	SL.7.1 Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grade 7 topics, texts, and issues, building on others' ideas and expressing their own clearly.	L.7.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.	
	RL.7.3 Analyze how particular elements of a story or drama interact (e.g., how setting shapes the characters or plot).	a. Apply grade 7 Reading standards to literature (e.g., "Analyze how particular elements of a story or drama interact").	a. Come to discussions prepared, having read or researched material under study; explicitly draw on that preparation by referring to evidence on the topic, text, or issue to probe and reflect on ideas under discussion.	c. Place phrases and clauses within a sentence, recognizing and correcting misplaced and dangling modifiers.*	
	Craft and Structure		b. Follow rules for collegial discussions, track progress toward specific goals and deadlines, and define individual roles as needed.	L.7.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.	
	RL.7.4 Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of rhymes and other repetitions of sounds (e.g., alliteration) on a specific verse or stanza of a poem or section of a story or drama.		c. Pose questions that elicit elaboration and respond to others' questions and comments with relevant observations and ideas that bring the discussion back on topic as needed.	a. Use a comma to separate coordinate adjectives (e.g., It was a fascinating, enjoyable movie but not He wore an old[,] green shirt).	
			d. Acknowledge new information expressed by others and, when warranted, modify their own views.	b. Spell correctly	
				Vocabulary Acquisition and Use	
				L.7.5 Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.	
				c. Distinguish among the connotations (associations) of words with similar denotations (definitions) (e.g., refined, respectful, polite, diplomatic, condescending).	

GRADE SEVEN ELA SCOPE AND SEQUENCE

Unit 6			
<p>Key Ideas and Details RI.7.1 Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.</p> <p>Craft and Structure RI.7.4 Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; analyze the impact of a specific word choice on meaning and tone.</p> <p>Integration of Knowledge and Ideas RI.7.6 Determine an author’s point of view or purpose in a text and analyze how the author distinguishes his or her position from that of others. RI.7.8 Trace and evaluate the argument and specific claims in a text, assessing whether the reasoning is sound and the evidence is relevant and sufficient to support the claims.</p>	<p>Text Types and Purposes W.7.2 Write informative/explanatory texts to examine a topic and convey ideas, concepts, and information through the selection, organization, and analysis of relevant content.</p> <p>a. Introduce a topic clearly, previewing what is to follow; organize ideas, concepts, and information, using strategies such as definition, classification, comparison/contrast, and cause/effect; include formatting (e.g., headings), graphics (e.g., charts, tables), and multimedia when useful to aiding comprehension.</p> <p>b. Develop the topic with relevant facts, definitions, concrete details, quotations, or other information and examples.</p> <p>c. Use appropriate transitions to create cohesion and clarify the relationships among ideas and concepts.</p> <p>d. Use precise language and domain-specific vocabulary to inform about or explain the topic.</p> <p>e. Establish and maintain a formal style.</p> <p>f. Provide a concluding statement or section that follows from and supports the information or explanation presented.</p>	<p>Presentation of Knowledge and Ideas SL.7.4 Present claims and findings, emphasizing salient points in a focused, coherent manner with pertinent descriptions, facts, details, and examples; use appropriate eye contact, adequate volume, and clear pronunciation.</p> <p>SL.7.5 Include multimedia components and visual displays in presentations to clarify claims and findings and emphasize salient points.</p> <p>SL.7.6 Adapt speech to a variety of contexts and tasks, demonstrating command of formal English when indicated or appropriate.</p>	<p>Conventions of Standard English L.7.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.</p> <p>c. Place phrases and clauses within a sentence, recognizing and correcting misplaced and dangling modifiers.*</p> <p>L.7.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p>a. Use a comma to separate coordinate adjectives (e.g., It was a fascinating, enjoyable movie but not He wore an old[,] green shirt).</p> <p>b. Spell correctly</p> <p>Vocabulary Acquisition and Use L.7.5 Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.</p> <p>c. Distinguish among the connotations (associations) of words with similar denotations (definitions) (e.g., refined, respectful, polite, diplomatic, condescending).</p>

GRADE SEVEN ELA SCOPE AND SEQUENCE

		<p>Production and Distribution of Writing</p> <p>W.7.5 With some guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on how well purpose and audience have been addressed.</p> <p>W.7.6 Use technology, including the Internet, to produce and publish writing and link to and cite sources as well as to interact and collaborate with others, including linking to and citing sources.</p>		
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GRADE SEVEN ELA SCOPE AND SEQUENCE

QUARTER 4				
	Reading	Writing	Speaking and Listening	Language
Year Long Curriculum Plan by Quarter	Unit 7			
	<p>Key Ideas and Details RI.7.1 Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.</p> <p>Craft and Structure RI.7.4 Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; analyze the impact of a specific word choice on meaning and tone.</p> <p>Integration of Knowledge and Ideas RI.7.7 Compare and contrast a text to an audio, video, or multimedia version of the text, analyzing each medium’s portrayal of the subject (e.g., how the delivery of a speech affects the impact of the words).</p> <p>RI.7.9 Analyze how two or more authors writing about the same topic shape their presentations of key information by emphasizing different evidence or advancing different interpretations of facts.</p>	<p>Text Types and Purposes W.7.1 Write arguments to support claims with clear reasons and relevant evidence.</p> <p>a. Introduce claim(s), acknowledge alternate or opposing claims, and organize the reasons and evidence logically.</p> <p>b. Support claim(s) with logical reasoning and relevant evidence, using accurate, credible sources and demonstrating an understanding of the topic or text.</p> <p>c. Use words, phrases, and clauses to create cohesion and clarify the relationships among claim(s), reasons, and evidence.</p> <p>d. Establish and maintain a formal style.</p> <p>e. Provide a concluding statement or section that follows from and supports the argument presented.</p> <p>Research to Build and Present Knowledge W.7.7 Conduct short research projects to answer a question, drawing on several sources and generating additional related, focused questions for further research and investigation.</p>	<p>Comprehension and Collaboration SL.7.3 Delineate a speaker’s argument and specific claims, evaluating the soundness of the reasoning and the relevance and sufficiency of the evidence.</p>	<p>Conventions of Standard English L.7.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p>a. Use a comma to separate coordinate adjectives (e.g., It was a fascinating, enjoyable movie but not He wore an old[,] green shirt).</p> <p>b. Spell correctly</p> <p>Knowledge of Language L.7.3 Use knowledge of language and its conventions when writing, speaking, reading, or listening.</p> <p>a. Choose language that expresses ideas precisely and concisely, recognizing and eliminating wordiness and redundancy.*</p> <p>Vocabulary Acquisition and Use L.7.4 Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 7 reading and content, choosing flexibly from a range of strategies.</p> <p>d. Verify the preliminary determination of the meaning of a word or phrase (e.g., by checking the inferred meaning in context or in a dictionary).</p> <p>L.7.5 Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.</p> <p>a. Interpret figures of speech (e.g., literary, biblical, and mythological allusions) in context.</p>

GRADE SEVEN ELA SCOPE AND SEQUENCE

		<p>W.7.8 Gather relevant information from multiple print and digital sources, using search terms effectively; assess the credibility and accuracy of each source; and quote or paraphrase the data and conclusions of others while avoiding plagiarism and following a standard format for citation.</p>		<p>b. Use the relationship between particular words (e.g., synonym/antonym, analogy) to better understand each of the words.</p>
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GRADE SEVEN ELA SCOPE AND SEQUENCE

Unit 8			
<p>Key Ideas and Details</p> <p>RL.7.1 Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.</p> <p>RL.7.2 Determine a theme or central idea of a text and analyze its development over the course of the text; provide an objective summary of the text.\</p> <p>Craft and Structure</p> <p>RL.7.4 Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of rhymes and other repetitions of sounds (e.g., alliteration) on a specific verse or stanza of a poem or section of a story or drama.</p> <p>RL.7.6 Analyze how an author develops and contrasts the points of view of different characters or narrators in a text.</p>	<p>Research to Build and Present Knowledge</p> <p>W.7.9 Draw evidence from literary or informational texts to support analysis, reflection, and research.</p> <p>a. Apply grade 7 Reading standards to literature (e.g., “Determine a theme or central idea of a text and analyze its development over the course of the text “or Analyze how an author develops and contrasts the points of view of different characters or narrators in a text”).</p>		<p>Conventions of Standard English</p> <p>L.7.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.</p> <p>a. Use a comma to separate coordinate adjectives (e.g., It was a fascinating, enjoyable movie but not He wore an old[,] green shirt).</p> <p>b. Spell correctly</p> <p>Knowledge of Language</p> <p>L.7.3 Use knowledge of language and its conventions when writing, speaking, reading, or listening.</p> <p>a. Choose language that expresses ideas precisely and concisely, recognizing and eliminating wordiness and redundancy.*</p> <p>Vocabulary Acquisition and Use</p> <p>L.7.4 Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 7 reading and content, choosing flexibly from a range of strategies.</p> <p>d. Verify the preliminary determination of the meaning of a word or phrase (e.g., by checking the inferred meaning in context or in a dictionary).</p> <p>L.7.5 Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.</p> <p>a. Interpret figures of speech (e.g., literary, biblical, and mythological allusions) in context.</p>

GRADE SEVEN ELA SCOPE AND SEQUENCE

				b. Use the relationship between particular words (e.g., synonym/antonym, analogy) to better understand each of the words.
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Objectives Assessed Throughout the Year
<p>Range of Reading and Text Complexity RL.7.10 By the end of the year, read and comprehend literature, including stories, dramas, and poems, in the grades 6–8 text complexity band proficiently, with scaffolding as needed at the high end of the range.</p> <p>RI.7.10 By the end of the year, read and comprehend literary nonfiction in the grades 6–8 text complexity band proficiently, with scaffolding as needed at the high end of the range.</p> <p>Production and Distribution of Writing W.7.4 Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)</p> <p>Range of Writing W.7.10 Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.</p> <p>Vocabulary Acquisition and Use L.7.6 Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases; gather vocabulary knowledge when considering a word or phrase important to comprehension or expression.</p>

MORAL FOCUS RESOURCES

Grade One Book List

Wisdom: Conscience

- *Manana, Iguana* by Ann Whitford Paul
- *Julius, The Baby of the World* by Kevin Henkes
- *Jamaica's Find* by Juanita Havill

Respect: Courtesy

- *Are you Quite Polite* by Alan Katz
- *Library Lion* by Michelle Knudsen
- *Stellaluna* by Janell Cannon
- *Shark in the Dark* by Peter Bentley

Gratitude: Thankfulness

- *Dear Juno* by Soyung Pak
- *A Splendid Friend Indeed* by Suzanne Bloom

Self-control: Patience

- *Katie Loves the Kittens* by John Himmelman
- *Llama Llama mad at Mama* by Anna Dewdney
- *Stop, Drop, and Chill* by Derrick D. Barnes
- *Today I Feel Silly & Other Moods that Make My Day* by Jamie Lee Curtis

Perseverance: Determination

- *The Biggest Pumpkin Ever* by Steven Kroll
- *The Little Red Hen* by Lucinda McQueen
- *Whistle for Willie* by Ezra Jack Keats

Courage: Confidence

- *Scaredy Squirrel* by Melanie Watt
- *A Bad Case of the Stripes* by David Shannon
- *There's Something in my Attic* by Mercer Mayer
- *The Carrot Seed* by Ruth Krauss

Encouragement: Friendliness

- *Fox Makes Friends* by Adam Relf
- *Miss Spider's Tea Party* by David Kirk
- *Fluffy and Baron* by Laura Rankin
- *Fox and His Friends* by Edward Marshall

Compassion: Kindness

- *Chicken of the Family* by Mary Amato
- *Mine! Mine! Mine!* By Shelly Becker
- *Have you Filled a Bucket Today?* By Carol McCloud
- *The Lunch Box Surprise* by Grace Maccarone

Integrity: Honesty

- *Carlos and the Squash Plant* by Jan Romero Stevens
- *My Big Lie* by Bill Cosby
- *The Berenstain Bears and the Truth* by Stan and Jan Berenstain

Additional Teacher Resources (K-5)

- *Teaching Character . . . It's Elementary* by Sadie Allran Broome, Nancy W. Henley
- *Building Moral Intelligence* by Michele Borba
- *Parents Do Make a Difference* by Michele Borba
- *Character Matters* by Thomas Lickona
- *What do you Stand For? A Guide to Building Character for Kids* by Barbara A. Lewis
- *What Kids Need to Succeed* by Peter L. Benson

MORAL FOCUS RESOURCES

Grade Four Book List

Wisdom: Good Judgment

- *The Biggest Bear* by Lynd Ward
- *Sorry!* by Trudy Ludwig
- *A Dog Called Kitty* by Bill Wallace

Respect: Fairness

- *Wings* by Christopher Myers
- *Teammates* by Peter Goldenbock

Gratitude: Contentment

- *The Seven Chinese Brothers* by Margaret Mahy
- *Drita My Homegirl* by Jenny Lombard

Self-control: Delay of Gratification

- *Any Small Goodness* by Tony Johnson
- *Chair for My Mother* by Vera B. Williams
- *Long Winter* by Laura Ingalls Wilder

Perseverance: Endurance

- *Chicken Sunday* by Patricia Polacco
- *Wilma Unlimited* by Kathleen Jrull
- *Muggie Maggie* by Beverly Cleary

Courage: Resilience

- *Perloo the Bold* by AVI
- *Sadako and the Thousand Paper Cranes* by Eleanor Coerr
- *The Castle in the Attic* by Elizabeth Winthrop

Encouragement: Thoughtfulness

- *Stone Fox* by John Reynolds Gardiner
- *Granny Torelli makes Soup* by Sharon Creech

Compassion: Caring

- *Judy Moody Saves the World* by Megan McDonald
- *The Family Under the Bridge* by Natalie Carlson
- *The Can Man* by Laura E. Williams

Integrity: Responsibility

- *Class President* by Johanna Hurwitz
- *Justin and the Best Biscuits in the World* by Mildred Pitts Walter
- *The Indian in the Cupboard* by Lynne Ried Banks

Additional Teacher Resources (K-5)

- *Teaching Character . . . It's Elementary* by Sadie Allran Broome, Nancy W. Henley
- *Building Moral Intelligence* by Michele Borba
- *Parents Do Make a Difference* by Michele Borba
- *Character Matters* by Thomas Lickona
- *What do you Stand For? A Guide to Building Character for Kids* by Barbara A. Lewis
- *What Kids Need to Succeed* by Peter L. Benson

MORAL FOCUS RESOURCES

Grade Seven Book List

Wisdom: Discernment

- *The Trouble with Tuck* by Theodore Taylor
- *The Giver* by Lois Lowry
- *The Little Prince* by Antoine de Saint-Exupery

Respect: Tolerance

- *The Pushcart War* by Jean Merrill
- *Pacific Crossing* by Gary Soto
- *Dear Mrs. Parks: a Dialogue with Today's Youth* by Rosa Parks

Gratitude: Appreciation

- *Bluish* by Virginia Hamilton

Self-control: Self-discipline

- *Homecoming* by Cynthia Voigt
- *Joey Pigza Swallowed the Key* by Jack Gantos
- *Hatchet* by Gary Paulsen
- *Make Lemonade* by Virginia Euwer Wolff

Perseverance: Flexibility

- *Out of the Dust* by Karen Hesse
- *Timothy of the Cay* by Theodore Taylor
- *Esperanza Rising* by Pam Munoz Ryan

Courage: Assertiveness

- *I am a Star: Child of the Holocaust* by Inge Auerbacher
- *My Side of the Mountain* by Jean Craighead George
- *Roll of Thunder, Hear my Cry* by Mildred Taylor

Encouragement: Generosity

- *The Great Gilly Hopkins* by Katherine Paterson
- *When Zachary Beaver Came to Town* by Kimberly Willis Holt
- *Cats in Krasinki Square* by Karen Hesse

Compassion: Empathy

- *Crash* by Jerry Spinelli
- *Belle Prater's Boy* by Ruth White
- *Absolutely Normal Chaos* by Sharon Creech

Integrity: Accountability

- *Miracle's Boys* by Jacqueline Woodson
- *Rescue Josh McGuire* by Ben Mikaelson
- *The Witch of Blackbird Pond* by Elizabeth George Speare


Additional Teacher Resources

- *Building Moral Intelligence* by Michele Borba
- *Parents Do Make a Difference* by Michele Borba
- *Character Matters* by Thomas Lickona
- *What do you Stand For? A Guide to Building Character for Kids* by Barbara A. Lewis
- *What Kids Need to Succeed* by Peter L. Benson

KINDERGARTEN MATH STORIES



VOLUME 1

National
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Introduction

Math stories are daily practices that allow students time to **solve problems in a way that makes sense to them, before a direct teacher model**. Students are expected and encouraged to solve problems using strategies that make sense to them. They are provided time to construct understanding through solving problems, collaborating with peers, and sharing solution strategies with the rest of the class.

The key idea in math stories is that students are provided an opportunity to solve a story problem **before** the teacher has modeled specific strategies to solve a problem. An essential idea for executing math stories is that as long as students can *count* and can *make sense* of a problem, they are able to solve any problem, often through using direct modeling and counting strategies, even before they begin to learn formal algorithmic procedures.

Essential Idea

As long as students can COUNT and MAKE SENSE of a problem, they can solve any problem that is presented to them by visualizing the problem and directly modeling with concrete objects or pictures. These strategies eventually evolve into counting strategies and number fact strategies, which leads to math fact fluency.



Math stories are designed to help students **make sense** of various types of addition and subtraction situation. When students visualize what happens in the story, they begin to associate images of joining and putting groups together with addition, and images of taking or giving away and separating with subtraction.

The structure of math stories builds the expectation that solving a problem takes time. It is necessary to think through the problem, figure out what is known, and determine what question is asked before you start to act on the numbers. The **process** of problem solving is just as important as arriving to a correct answer.

Standards for Mathematical Practice

Along with focusing on critical standards in addition and subtraction, math stories allow students to experience all of the eight math practice standards. Most notably, the math story structure gives students regular opportunities to work with the following:

- Math Practice Standard 1: Make sense of problems and persevere in solving them.
- Math Practice Standard 3: Construct viable arguments and critique the reasoning of others.
- Math Practice Standard 4: Model with mathematics.
- Math Practice Standard 5: Use appropriate tools strategically.

Teachers should work to establish a classroom culture that promotes students' ability to engage in these and all the math practice standards. This requires creating a culture where **mistakes** are expected and valued as learning opportunities. Because students are not shown **how** to solve number stories, students will regularly

encounter productive struggle, and will practice making sense of problems and will persevere in solving them each day.

Students are encouraged and expected to share their thinking and listen to the ideas of others, to pose and answer questions, and to explore and become familiar with mathematical tools. These tools are intentionally selected to highlight the mathematical concepts to be pursued in the lesson.

Introducing Math Stories

In order to solve story problems, student must be able to visualize the situation and understand what is being asked. Therefore, the math stories structure asks students to picture the story in their mind, to retell it in their own words, and to model it. The focus is that students make sense of the problem, therefore teachers should avoid labeling problems as addition or subtraction for students. A critical skill of sense making is determining what operation is needed. Additionally, many problems can be solved in a variety of ways. We want to provide opportunities for students to choose a solution strategy that makes sense to them, based on their understanding of the situation. Some students may decide to directly model the story with concrete objects, such as counters or cubes. Others may choose to start by drawing a picture that represents the story. Both strategies are appropriate, and students should be given the opportunity to use the strategy that comes naturally.

Supporting Students During Problem Solving

Students should be encouraged to show their work with objects, pictures, numbers, words, and, if they are ready, equations.

Objects: Manipulatives often come with a misconception that they should only be used by struggling or below grade-level students. When encountering new types of problems or working with larger numbers than they are used to, the majority of students naturally need to use objects to help them directly model and made sense of situations, even students who may have exhibited what appears to be “mastery” with a problem type they have been working with for a while. Manipulatives should be, at least, stored and made available in a way that they can easily be accessed by students if needed.

Pictures: Many students will initially draw each of the actual objects described in the math story. One goal for these students is to help them attach numbers to their work. You might ask how many objects are in each group, and then help the student label the groups with a number. Another goal is to move these students to use more efficient methods of recording. For example, students will need to understand what is important to show in math versus art class. For some students, this may mean drawing pictures with less detail. For other students, this may mean drawing a counter, cube, or tally to represent the objects in the story. Either way, students should use a representation that makes sense to them.

Numbers and Equations: It can be tricky to figure out how these students are solving the problem and to assess what they understand. Ask questions such as, “I see these three numbers here. Can you tell me what they mean?”

Words: If students write “I just knew” or “I counted”, then encourage them to explain *how* they counted. You might ask questions such as, “Where did you start counting? What numbers did you say when you counted? Where did you stop? How did you know when to stop?” After asking these questions, model how they might record their answer on paper.

It can be challenging for students to record the actual strategy they used to solve the problem. For example, a student may use the count on strategy to solve, but his/her written work suggests counting all. Ask students to explain their strategy, and help them think about how they might show that.

Recording Student Strategies

How the teacher records will give students models for how they can record their work. Whenever possible, base your recording on the way the student recorded.

7

Tammy found 4 pencils.
James found 2 pencils.
How many pencils did they find?

Corey's strategy

Tammy's pencils: 1, 2, 3, 4
James' pencils: 5, 6

Danae's strategy

1, 2, 3, 4 (Tammy's pencils)
5, 6 (James' pencils)

Isaiab's strategy

James' pencils: □, □ (2)
Tammy's pencils: 3, 4, 5, 6

Jasmine's strategy

Tammy's pencils: □, □, □, □ (4)
James' pencils: 5, 6

MATH STORY STRUCTURE OVERVIEW

Engage

 3-4 minutes

1

Show the Engage image from PowerPoint [see myNHA Curriculum app]. This will allow students to begin thinking about the context of the math story.



Look at this picture. I want you to take 15 seconds to think about what you notice and what you wonder.

2

Use a **Think-Pair-Share** structure (see *Best Practices*) to have students share:



Share with your partner what you notice and wonder about the picture.

3

Use an attention signal to bring students back to the whole group. Have 4-5 students share out for each. Accept any and all responses, as this will validate student thinking.

4

Record the students' notices and wonderings on the board or chart paper.

Note: It is not required to record notices/wonderings every day, however it should be done often at the beginning of the year and at least 2-3 times per week throughout the remainder of the year.



Best Practices

- It is suggested that students be seated in a carpet area for this part of the math story. This will create an engaging and comfortable setting for students to discuss ideas and set the stage for the problem they will later solve.
- Preplan a structure for the **Think-Pair-Share** and be very explicit with the directions.
Example: (After giving think time...)



Turn to your partner to share what you noticed. The partner who [has the most letters in their name] will go first. You will have [20 seconds] to share, I will tell you when to switch. Go!

Problem **10-12 minutes****1 Visualize**

Visualizing helps students to make sense of the problem they are about to work with. In the Engage, students viewed a picture that is connected to the math story for the day. Now you will ask students to visualize the context of the math story.



I'm going to tell you a story. I want you to close your eyes and try to see it in your mind as I tell it. Example: Leah has 4 toy cars. James gave her 5 toy cars.

Note: For this first read, tell the math story **without the question** while students visualize. The story also appears on the slide following the Engage image.

2 Retell

Having students think about the story they just heard and retell it to a partner will, again, allow students to make sense of what is happening in the story. This will later help students when it comes time to solve the actual problem.

Use a **Think-Pair-Share** structure (see *Best Practices in Engage*) to have students retell the story:



Think: **Open your eyes and think about what you heard in the story. What did you hear first? What did you hear next? Give students some short think time.**

Pair: **Turn to your partner. Give students guidance on who will share first.**

Share: **You and your partner will have [30 seconds] to share what you heard in the story. Go!**

Use an attention signal to bring students back whole group. Ask 3-4 students to tell what they remember about the story. Even if one student tells the entire story correctly, ask a few more students to share out as well. The focus is on what students visualized in the story, not necessarily on retelling it exactly as it was told. If necessary, guide students' retelling by asking ***What did you hear first? What did you hear next?***

If students are seated at the floor still, this would be a good time to send them back to their seats.

3 Pose the Problem


Reread the math story one more time, this time asking the question at the end. The question can also be brought up on the math story slide at this point.



Now I'm going to tell you the story again, but this time I have a question I want you to think about. Example: Leah has 4 toy cars. James gave her 5 toy cars. How many toy cars does Leah have now?

4 Make Sense

Pose a **Think-Pair-Share** question (*see example below*) to allow students to estimate and/or explore reasonable solutions before beginning to solve the problem.


 **Example: Do you think there will there be more than 5 cars or less than 5 cars? How do you know? Turn and talk with a partner about what you think and why.**

Note: This is **not** the point to discuss with students what operation should be used to solve or what an equation for this problem would be.

5 Solve

Students are now given time to model the problem using manipulatives and/or pictures. They should also document their work and strategy on the student recording page.*

The teacher should **not** model how to solve the problem or tell students what equation to use. Students should focus on the context of the story to choose a strategy to solve that makes sense to them.


 **Now I want you to think about our story use manipulatives or pictures to model the problem and show your solution strategy. If you use manipulatives, draw a picture of what you did with your manipulatives.**

Students can begin by working on their own to solve the problem, but should be given the option to work collaboratively. All students should be given the opportunity to share their strategy or clarify their thinking with a peer before the whole group discussion.

***Note:** When looking at the pacing calendars for each unit, math stories that are highlighted green will not have a student recording page available. This is designed purposefully, as students are encountering a new problem or working within a larger total on a familiar problem type.

6 Circulate and Ask Questions

Circulate, listen, and observe student thinking. While it may feel natural to focus on whether students are getting the problem correct or not, the focus should be shifted more toward looking for and seeking to understand students' strategies. Support students' attempts at the problem, even if the strategy is inefficient, to validate and build from their thinking. Ask probing questions (*see examples below*) to clarify student thinking, determine solving strategies, and keep students connected to the **context** of the math story.

 **Examples: What do we know in the problem? How could you use the manipulatives to show [detail from math story]? How did you count these? What part of the story does this show?**

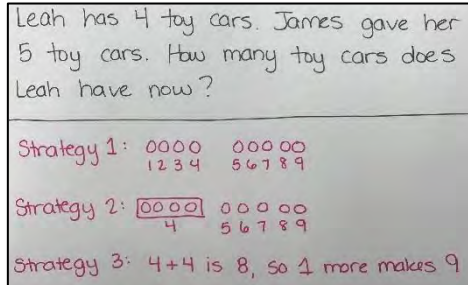
Remember this is not the time to FIX the mathematician, but to DEVELOP them.

While circulating, listen to students talk about their strategy to determine who will share during the discussion and in what sequence.

7

Choose

Identify 2-4 students who you will have share in the discussion based on the strategies you have *anticipated* and pre-planned to highlight. While *monitoring* student work, *select* the students to share. Decide the *sequence* in which students will share based on the progression of strategies so that you can make appropriate *connections*.



Leah has 4 toy cars. James gave her 5 toy cars. How many toy cars does Leah have now?

Strategy 1: 0000 00000
1234 56789

Strategy 2: $\frac{0000}{4}$ 00000
56789

Strategy 3: 4+4 is 8, so 1 more makes 9

**Best Practices**

- In order to make the math story more engaging, it is suggested to embellish the story with student names, teacher names, and other relatable details. Make the story connect to you or your students.

Original Math Story	Embellished Math Story
Leah has 4 toy cars. James gave her 5 toy cars. How many toy cars does Leah have now?	I noticed while we were having indoor recess today that you were all playing with different things. I saw Leah and James playing with cars. Leah had 4 cars when she started playing. Then James decided he wanted to play with something else, so he gave his 5 cars to Leah. How many cars did Leah have then?

- While observing students and determining who will share during the discussion, put a numbered sticky note on students' desk in the order that they will share.

Discussion
5-7 minutes

1

Students Share Strategies

Ask the 2-4 pre-determined students to share their strategies for solving the problem using the pre-planned sequence. Students should have their student recording page and/or manipulatives projected under the document camera as they talk through their strategies.

2

Teacher Records Student Strategies & Poses Questions

As students share their thinking, the teacher should record their strategies on chart paper or the whiteboard to capture the students' thought processes and have to refer back to during discussion. Pose questions to clarify each student's strategy and connect the work back to the problem.



Examples: What part of the math story does this part of your picture represent? How did count your connecting cubes (e.g., counting all, counting on, etc.)?

3

Students Discuss, Analyze and Compare Strategies

Pose a **Think-Pair-Share** to allow students to discuss, analyze and/or compare strategies to make connections (see examples below).

The following options can help facilitate a meaningful student discussion:

- Give students a focus as classmates are sharing to find one thing that is **similar** and/or one thing that is **different** about the strategy compared to their strategy.
- Have students show a thumb up if they used the same or similar strategy.
- Have students retell the strategy shared in their own words:
 - **Turn to your partner and explain the strategy _____ used to solve.**
- Encourage students to ask the student who is sharing a clarifying or probing question about his/her strategy.

4

Teacher Connects Strategies to Equations

This is the point in the math story where it is most appropriate to discuss equations if students have not used them to represent their thinking **on their own**. Discussing an equation now, rather than earlier in the math story process, ensures that the equation will match the student work versus students trying to match their work to an equation.



Example: Let's think about this strategy and the picture, how could we show what [student] did with numbers also.

Initially, the teacher should model writing the equation, connecting each part to the picture and story. As students begin representing their thinking with numbers, the teacher should question students about the connection of each part of the equation to the story.

**Best Practices**

- Prior to the whole group discussion, consider having students share strategies with a partner.
- It is suggested that students be seated in a carpet area for this part of the math story. This will create an engaging and comfortable setting for students to discuss ideas. It will also limit the distraction of manipulatives and other materials as strategies are being shared.

Key Points

 2-3 minutes

1

This is where the teacher will make an explicit and pre-planned connection from the student strategies to the big mathematical idea for the day/week/unit. The teacher should always try to build off student thinking and connect to mathematical ideas at the conclusion of the math story. The ultimate goal is to begin building procedural fluency from conceptual understanding.

This is the point in the lesson where the teacher is creating or finalizing an anchor chart that was started in the discussion. This anchor chart highlights key strategies that can be used in later math stories.

Specific examples and suggestions for Key Points will be provided for individual math stories throughout the year and will change as the focus on different problem types and strategies change.



Example: ***I noticed there were two strategies that used counting (see Strategies 1 and 2 in step 7 of Problem), let's look a little closer at those two strategies.***

Remember in the first strategy, [student] counted like this: 1, 2, 3, 4, 5, 6, 7, 8, 9.

In the second strategy, [student] counted like this: 4, 5, 6, 7, 8, 9.

Teacher may then use a ***Think-Pair-Share*** to have students discuss how the strategies are similar and different.

We found out that both strategies helped us figure out that Leah had 9 cars.

In the first strategy, we counted all of Leah's cars and the cars James gave her.

In the second strategy though, we remembered that Leah had 4, so we didn't have to count them again. Instead we just counted on from 4 and that took less time to count!

2

Wrap-up the math story by articulating what students did today and how it connects to big mathematical ideas and the 'I can' statement.



Example: ***"Boys and girls, today you solved an equal groups problem by modeling the problem and then using skip counting or repeated addition to get the total."***

Practice Problem

An additional problem is available, but not required to be used, for each math story. This problem follows the same problem type and works with similar numbers. The practice problem can be used to encourage students to try a different strategy. This could also be used as an exit ticket/formative assessment.

Kindergarten Scope & Sequence

*Note: Numeracy Assessment windows are approximate. Exact dates will vary by school.

		Math Story Focus	Math Expressions
	1	Unit 1 Exploring Manipulatives K.CC.3, K.CC.4, K.CC.4a, K.CC.4b Grab and Count	Unit 1: Lessons 1-3
	2		Unit 1: Lessons 4-7, 9
	3		Unit 1: Lessons 8 & 10
	4		Unit 1: Lesson 11-13
	5		Unit 1: Lessons 14-17
	6		Unit 1: Lesson 17-18
Unit 1 Assessment			
Numeracy Assessment Fall Window*	7	Unit 2 K.CC.3, K.CC.4, K.CC.4a, K.CC.4b, K.CC.5 The Counting Jar	Unit 2: Lessons 1-4
	8		Unit 2: Lessons 5-9
	9		Unit 2: Lessons 9-12
	10		Unit 2: Lessons 13-15
	11		Unit 2: Lessons 15-18
	12		Unit 2: Lessons 19-20
Unit 2 Assessment			


	Week	Math Story Focus	Math Expressions	
	13	K.OA.1, K.OA.2 Add To [Result Unknown] – Within 10	Unit 3: Lessons 1-3	
	14		Unit 3: Lesson 5-8	
	15	K.OA.1, K.OA.2 Take From [Result Unknown] – Within 10	Unit 3: Lesson 9-11	
	16		Unit 3: Lesson 12-14	
	17	K.OA.1, K.OA.2 Mixed Review: Add To/Take From [Result Unknown] – Within 10	Unit 3: Lessons 15-18	
	18		Unit 3: Lesson 18-20	
	19		Unit 3: Lesson 21	
	Unit 3 Assessment			
	Numeracy Assessment Winter Window*	20	K.OA.1, K.OA.2 Put Together [Result Unknown] – Within 10	Unit 4: Lessons 1-4
		21		Unit 4: Lessons 5-8
		22	K.OA.1, K.OA.2, K.OA.3 Put Together/Take Apart [Both Addends Unknown – Within 10	Unit 4: Lessons 9-11
		23		Unit 4: Lessons 11-13
		24	K.OA.1, K.OA.2 Mixed Review: Add To/Take From, Put Together [Result Unknown] – Within 10	Unit 4: Lessons 14-18
		25		Unit 4: Lessons 19-21
		26		Unit 4: Lessons 21-22
	Unit 4 Assessment			

	Week	Math Story Focus	Math Expressions
	27	K.OA.1, K.OA.2, K.OA.4 Add To [Change Unknown] – Within 10	Unit 5: Lessons 1-3
	28		Unit 5: Lesson 4-6
	29	K.OA.1, K.OA.2 Add To/Put Together [Result Unknown] – Within 20	Unit 5: Lessons 7-9
	30		Unit 5: Lessons 10-13
	31	K.OA.1, K.OA.2 Take From [Result Unknown] – Within 20	Unit 5: Lessons 14-17
	32		Unit 5: Lessons 17-20
	Numeracy Assessment Winter Window*	33	K.OA.1, K.OA.2 Mixed Review: Add To/Put Together, Take From [Result Unknown] – Within 20
34		Unit 5: Lesson 23	
Unit 5 Assessment			

THIRD GRADE MATH STORIES



READY
VOLUME 1

National
Heritage
Academies® 

3rd Grade Math Block Breakdown

The NHA 90 minute math block is composed of three distinct components in 3rd grade as shown in the visual below. NHA’s math block structure ensure that all students are engaged in the math classroom and have access to the mathematics being taught.

Pacing and guidance for each component of the math block is provided in this book.

<h3 style="margin: 0;">Snap Facts Routine</h3> <p style="margin: 0;"><i>Daily Multiplication Fluency Routine</i></p>	5 minutes
<h3 style="margin: 0;">Math Story</h3> <p style="margin: 0;"><i>Grade Level Math Story that is Accessible to ALL Students</i> <i>The teacher facilitates the math story using the structure shown below.</i></p> <div style="border: 1px solid #336699; padding: 10px; margin: 10px auto; width: 80%; text-align: center;"> <pre> graph TD Engage --> Problem Problem --> Discussion Discussion --> KeyPoints[Key Points] KeyPoints --> Practice[Practice/Formative Assessment] </pre> </div>	30 Minutes
<h3 style="margin: 0;">Classroom Based Instruction</h3> <p style="margin: 0;"><i>Whole Group or Small Group Instruction</i> <i>Resource: Curricular Tool or Intervention Tool</i></p>	55 Minutes

3rd GRADE SCOPE & SEQUENCE		
PRIORITY STANDARDS ARE INDICATED WITH BLUE FONT		
Week	Math Story Focus	READY Lessons
1	Understanding Multiplication 3.OA.1, 3.OA.3	None: Classroom Culture and Procedures
2	Understanding Multiplication 3.OA.1, 3.OA.3	None: Classroom Culture and Procedures
3	Understanding Multiplication 3.OA.1, 3.OA.3	Lesson 20: Tell and Write Time 3.MD.1
4	The Relationship Between Multiplication & Division 3.OA.2	Lesson 21: Solve Problems About Time 3.MD.1
5	The Relationship Between Multiplication & Division 3.OA.2, 3.OA.3	Lesson 22: Liquid Volume Lesson 23: Mass 3.MD.2
6	The Relationship Between Multiplication & Division 3.OA.1, 3.OA.2, 3.OA.3	Lesson 24: Solve Problems Using Scaled Graphs Lesson 25: Draw Scaled Graphs 3.MD.3
7	The Relationship Between Multiplication & Division 3.OA.8	Lesson 26: Measure Length and Plot Data on Line Plots 3.MD.4
8	The Relationship Between Multiplication & Division 3.OA.8	Interim Review
Interim 1 Testing Window		
1	Using Known Facts-Two Part Problems 3.OA.3, 3.OA.5, 3.OA.7	Lesson 1: Understand the Meaning of Multiplication 3.OA.1
2	Using Known Facts-Two Part Problems 3.OA.3, 3.OA.5, 3.OA.7	Lesson 4: Understand the Meaning of Division 3.OA.2
3	Grid Array to Area Model & Break Apart Strategy 3.OA.2, 3.OA.3, 3.OA.5, 3.OA.7, 3.OA.8	Lesson 5: Understand how Multiplication and Division are Connected 3.OA.6

4		Grid Array to Area Model & Break Apart Strategy 3.OA.2, 3.OA.3, 3.OA.5, 3.OA.7, 3.OA.8	Lesson 7: Understand Patterns 3.OA.9
5		Multiplication and Division 3.OA.4, 3.OA.6	Lesson 8: Use Place Value to Round Numbers 3.NBT.1
6		Introduction to Fractions 3.NF.1, 3.NF.2, 3.NF.3a, 3.NF.3b, 3.NF.3c	Lesson 9: Use Place Value to Add and Subtract 3.NBT.2
7	Unit 5	Introduction to Fractions 3.NF.1, 3.NF.2, 3.NF.3a, 3.NF.3b, 3.NF.3c	Lesson 11: Solve One-Step Problems Using Multiplication and Division 3.OA.3
8		Introduction to Fractions 3.NF.1, 3.NF.2, 3.NF.3a, 3.NF.3b, 3.NF.3c	Interim Review
Interim 2 Testing Window			
1	Unit 6	Area & Multiplication 3.MD.6, 3.MD.7a, 3.MD.7b, 3.MD.7c, 3.MD.7d	Lesson 14: Understand What a Fraction Is 3.NF.1
2		Area & Multiplication 3.MD.6, 3.MD.7a, 3.MD.7b, 3.MD.7c, 3.MD.7d	Lesson 15: Understand Fractions on a Number Line 3.NF.2
3		Area & Multiplication 3.MD.6, 3.MD.7a, 3.MD.7b, 3.MD.7c, 3.MD.7d	Lesson 16: Understand Equivalent Fractions Lesson 17: Find Equivalent Fractions 3.NF.3
4		Area & Multiplication 3.MD.6, 3.MD.7a, 3.MD.7b, 3.MD.7c, 3.MD.7d	Lesson 18: Understand Comparing Fractions Lesson 19: Use symbols to Compare Fractions 3.NF.3
5	Unit 7	Multiplying by Multiples of 10 & Multi-Step Problems 3.OA.3, 3.NBT.3, 3.OA.8	Lesson 27: Understand Area Lesson 28: Multiply to Find Area 3.MD.5, 3.MD.6, 3.MD.7
6		Multiplying by Multiples of 10 & Multi-Step Problems 3.OA.3, 3.NBT.3, 3.OA.8	Lesson 29: Add Areas Lesson 30: Connect Area and Perimeter 3.MD.7, 3.MD.8
7	Unit 8	Mixed Review [Multiplication, Division, Multi-Step, Fractions]	Lesson 31: Understand Properties of Shapes 3.G.1
8		Mixed Review [Multiplication, Division, Multi-Step, Fractions]	Lesson 32: Classify Quadrilaterals 3.G.1
9		Mixed Review [Multiplication, Division, Multi-Step, Fractions]	Lesson 33: Divide Shapes into Parts with Equal Areas 3.G.2
State Testing Window			

RATIONALE FOR READY UNIT SEQUENCING

In third grade we have changed the order of the READY units for two main reasons.

First, we want to teach towards the standard, not the tool. When you look at the READY scope and sequence, we encourage you focus on the standards students are to master during this time not necessarily the specific READY lessons. In the 2018-219 Scope and Sequence, we have moved Unit 1 so that it is taught *after* Interim 1. This way students will have the appropriate amount of time to develop and make sense of multiplication concepts through Math Stories FIRST, before they get to those lessons/concepts in READY. For this reason, students will start the year in Unit 5 which focus on Time, Measurement and Graphs.

Second, we have designed the scope and sequence, so priority concepts are developed in Math Stories before they are explicitly taught in READY. In the first 8 weeks of school, Math Stories are focused on building deep foundational knowledge of multiplication and division. Students will have this understanding BEFORE encountering multiplication and division READY lessons in the second 8 weeks of school. The scope and sequence follows this same pattern for fractions as well. When you reach concepts/units in READY that you have already explored in Math Stories, you may find that you do not need all parts of every READY lesson. The READY lessons should be used to solidify understanding, introduce algorithms, and ensure all your students have mastered the objective, which could be done in small group and/or whole group format.

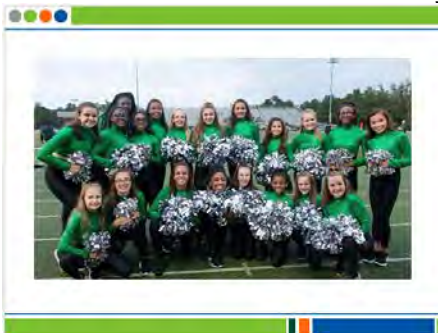
MATH STORY OVERVIEW

Engage

 4 Minutes

1

Show the Engage image from PowerPoint [see myNHA, Curriculum Tab]. This will allow students to begin thinking about the context of the Math Story.



2

Pose questions to students using a Think-Pair-Share structure:



What do you notice about the picture?
What do you wonder about the picture?

3

Have several students share out whole group. Accept any and all responses, even non-mathematical notices and wonderings. This will validate student thinking.

4

Record the students' notices and wonderings on the board or anchor chart at least 2-3 times a week.

Notice	Wonder
group of girls	Is there a football game?
cheerleaders	Are they on a dance team?
dance team	Are they cheerleaders?
on a football field	How old are they?
more than 10 girls	



Best Practices

- We suggest bringing students to a carpet area for this portion of the Math Story. This will create an engaging and comfortable setting as you set the stage for the problem that the students will later solve.*

Problem



12 Minutes

1 Visualize

Visualizing a story helps students to make sense of the problem. Students just viewed a picture that is connected to the Math Story for the day. Now you will ask students to visualize the context of the Math Story.



“I’m going to tell you a story, and I want you to try to see it in your mind as I tell it.”

You will first read the Math Story without the question while students visualize.

2 Retell

Having students think about the story they just heard and retelling it to a partner will, again, allow students to make sense of what actions are occurring in the story. This will later help students when it comes time to solve the actual problem.

Have students retell the story using a Think-Pair-Share structure:



Think- Have students think about what they heard in the story.

Say: **What did you hear first? What did you hear next?**

Pair- Say: **Turn to your partner**

Share- Have students share with their partner.

[ex: Partner A share what you heard first, Partner B share what you heard next.]

Bring class back together whole group and ask several students to tell what they remember about the story. Even if one student tells the story correctly, ask a few more students to share out as well. The focus is on **visualizing** what is happening in the story, not on retelling it exactly as it was told. If necessary, guide students’ retelling by asking **What did you hear first? What did you hear next?**

3 Pose the Problem

Now it is time to pose the **whole** problem for students to solve. Reread the Math Story one more time, this time asking the question at the end.

4

Make Sense

Pose a *Think-Pair-Share* question (see example below) to allow students to estimate and/or explore reasonable solutions before beginning to solve the problem.



Example: *Do you think there will be more than 8 eyes or less than 8 eyes? How do you know? Turn and tell your partner if you think there will be more or less than 8 eyes.*

5

Solve

Have students return to their seats to model the problem using manipulatives or pictures and document the strategy they use on their student recording sheet. The teacher should **NOT** model **how** to solve the problem or what equation to use. Students should focus on the context of the story to choose a strategy to solve that makes sense to them.



Say: *Now that you have a visual image of what is happening in today's story, I want you to:*

1. *Think about the strategy you want to use.*
2. *Head back to your seat and use cubes or pictures to model the problem and show your solution strategy.*
3. *Work with your partner and share your solution strategy before the discussion.*

Students can begin by working on their own to solve the problem but should be given the option to work collaboratively. All students should be given the opportunity to share their strategy or clarify their thinking with a peer before the whole group discussion.

6

Circulate and Ask Questions

Circulate, listen, and observe student thinking. Support their attempt at the problem, even if it is inefficient, to validate and build from their thinking. Then ask probing questions and keep students connected to the **context** of the Math Story.



1. *What do we know in the problem?*
2. *How could you use these cubes to show the [eyes on one person]? On two people? How can that help you?*
3. *Is there a faster way you could count the number of [eyes] in your picture?*
4. *Is there another way you could find the total number of [eyes] in the picture?*

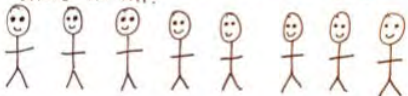
Remember this is not the time to FIX the mathematician, but to DEVELOP them.

As you are circulating and listening to the students talk about their strategy, be thinking about who you will choose to share their strategy during the discussion. What part of their strategy do you want to highlight? Will they share first, second, or last?

7 Choose

Identify 2-4 students who you will have share in the discussion based on the strategies you have pre-planned to highlight. Decide in what order they will share based on the progression of strategies.

There are 8 people on the dance team. Each person has 2 eyes. How many eyes are there in all?



① 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16

② 2, 4, 6, 8, 10, 12, 14, 16

③ $2+2+2+2+2+2+2+2=16$

Best Practices

- When you ask students to visualize, have students close their eyes as you tell the story.
- In order to make the Math Story more engaging, we suggest embellishing the story with student names, teacher names, and other relatable details. Make the story connect to you or your students.

Original Story	Embellished Story
In a garden there are 6 rows of tulips. There are 8 tulips in each row. How many tulips are there in all?	Boys and girls, you know how I love gardening! This past Spring I planted lots of different flowers in my flower garden. One of my favorite types of flowers is a tulip. In my garden I planted 6 rows of tulips. There were 8 tulips in each row. How many tulips were there in all?

Discussion



6 Minutes

- 1 Ask the 2-4 pre-determined students to share their strategy for solving the problem. As students share their thinking, the teacher should record their strategies on chart paper to capture the students' thinking process.

Options to facilitate student discussion:

- Teacher asks the student sharing, **WHY** they chose the strategy they did.
- Teachers asks the other students to find one thing that is **similar** and one thing that is **different** about the strategy compared to their strategy.
- Another student can ask the student who is sharing, a clarifying or probing question about their strategy.
- Other students retell the strategy in their own words.
- Show a thumbs up if you used the same or similar strategy.
- Turn to your partner and explain the strategy that _____ used to solve.
- Who can tell in their own words how _____ solved this problem?

Key Points



3 Minutes

- 1 This is where the teacher will make an explicit and pre-planned connection from the student strategies to the big mathematical idea for the day/week/unit. Specific examples and suggestions for Key Points will be provided for individual Math Stories throughout the year and will change as the focus on different mathematics strategies change.



Example: ***“I noticed you all shared strategies that involved 8 people with two eyes each. It really helped us to use our cubes or draw pictures to then count the total number of eyes. Let’s take a look at strategy 3. Turn and talk to your partner, where do you see the ‘8 people’ and where do you see the ‘2 eyes’ represented?”***

We are going to continue exploring how to model equal groups problems on paper, solve using different strategies AND represent with words and an equation for the rest of this week. To close out our Math Story today, you are going to solve one more problem on your own.”

- 2 Wrap-up the Math Story by articulating what students did today and how it connects to big mathematical ideas and the I Can statement.



Example: ***“Boys and girls, today you solved an equal groups problem by modeling the problem and then using skip counting or repeated addition to get the total.”***

Practice Problem

 5 Minutes

- 1** Students will now solve one practice problem **ON THEIR OWN**, similar to the one that was just done in the Math Story.

Give students the same expectations to solve this problem:

- 1. Think about the strategy you want to use.**
- 2. Use manipulatives, pictures, or numbers to model the problem and show your solution strategy.**
- 3. Work independently.**



Best Practices

- *There are different ways that this Practice Problem can be used to inform the teacher of student progress:*
 - *Collect it and scan through to identify students who are struggling with finding a solution strategy.*
 - *Circulate as students are working on the problem to observe solution strategies being used, then go over together whole class.*
 - *Collect and each day identify a different group of students whose you will check and record progress.*

8 th Grade: Common Assessment Blueprints					
Chapter	Common Core	Number of Questions			
		I1	I2	I3	I4
1: Equations	8.EE.7a, 8.EE.7b	18			
2: Transformations	8.G.1a, 8.G.1b, 8.G.1c, 8.G.2, 8.G.3, 8.G.4	12	2		2
Interim 1 Free Response Question: 8.G.1, 8.G.2, 8.G.3, 8.G.4					
3: Angles and Triangles	8.G.5		6		
4: Graphing and Writing Linear Equations	8.EE.5, 8.EE.6, 8.F.4		14	2	2
5: Systems of Linear Equations	8.EE.7a, 8.EE.7b, 8.EE.8a, 8.EE.8b, 8.EE.8c		10	2	2
Interim 2 Free Response Question: 8.EE.5, 8.EE.6, 8.EE.7, 8.EE.8					
6: Functions	8.F.1, 8.F.2, 8.F.3, 8.F.4, 8.F.5			12	2
7: Real Numbers and the Pythagorean Theorem	8.NS.1, 8.NS.2, 8.EE.2, 8.G.6, 8.G.7, 8.G.8			12	2
8: Volume and Similar Solids	8.G.9			4	
Interim 3 Free Response Question: 8.F.1, 8.F.2, 8.F.3, 8.F.4, 8.F.5					
9: Data Analysis and Displays	8.SP.1, 8.SP.2, 8.SP.3, 8.SP.4				10
10: Exponents and Scientific Notation	8.EE.1, 8.EE.3, 8.EE.4				12
Interim 4 Free Response Question: 8.SP.1, 8.SP.2, 8.SP.3, 8.SP.4					
Total		30	32	32	32

Bold standard indicates that the, “teaching is complete, standard can be assessed” according to Big Ideas Math. For the non-bold standards, please limit the questions you develop to the degree in which the standard has been taught within that chapter.

Free Response Questions: Questions should include, but are not limited to, the standards listed.

Algebra: Common Assessment Blueprints					
Chapter	Common Core	Number of Questions			
		I1	I2	I3	I4
1: Solving Linear Equations	N.Q.1 , N.Q.2 , A.CED.1 , A.CED.4 , A.REI.1 , A.REI.3	11			
2: Graphing and Writing Linear Equations	N.Q.1 , A.CED.2 , A.CED.3 , A.REI.10 , 8.F.3 , 8.F.4 , F.IF.4 , F.IF.6 , F.IF.7a , F.BF.1a , F.LE.5	9 1			
3: Solving Linear Inequalities	N.Q.2 , A.CED.1 , A.CED.3 , A.REI.3 , A.REI.12	8 1			
Interim 1 Free Response Question: A.CED.2 , A.CED.3 , A.REI.12					
4: Solving Systems of Linear Equations	N.Q.2 , A.CED.3 , 8.EE.8a , 8.EE.8b , 8.EE.8c , A.REI.5 , A.REI.6 , A.REI.11 , A.REI.12		2 1 4	1	
5: Linear Functions	8.F.1 , 8.F.2 , 8.F.3 , 8.F.4 , 8.F.5 , F.IF.1 , F.IF.2 , F.IF.3 , F.IF.5 , F.IF.7b , F.IF.9 , F.BF.1a , F.BF.2 , F.BF.3 , F.LE.1b , F.LE.2		7 3	1	1
6: Exponential Equations and Functions	N.RN.1 , N.RN.2 , N.RN.3 , N.Q.1 , N.Q.3 , A.SSE.1a , A.SSE.1b* , A.SSE.3c , A.CED.1 , A.CED.2 , A.REI.3 , A.REI.10 , A.REI.11 , 8.F.2 , F.IF.3 , F.IF.7e , F.IF.8b , F.IF.9 , F.BF.1a , F.BF.1b , F.BF.2 , F.BF.3 , F.LE.1a , F.LE.1c , F.LE.2 , F.LE.5		5 7 1	2 1	1 1
Interim 2 Free Response Question: A.REI.3 , F.IF.2					
7: Polynomial Equations and Factoring	A.SSE.1a , A.SSE.2 , A.SSE.3a , A.APR.1* , A.REI.4b			7 2	2
8: Graphing Quadratic Functions	A.CED.2 , A.REI.10 , 8.F.5 , F.IF.4 , F.IF.6 , F.IF.7a , F.BF.3 , F.LE.3			4 1 3	1
9: Solving Quadratic Functions	A.SSE.3b , A.CED.1 , A.REI.4a , A.REI.4b , A.REI.7 , A.REI.11 , F.IF.8a			4 3 1	1
Interim 3 Free Response Question: A.SSE.1a , A.SSE.3a , A.APR.1 , F.IF.7a , F.IF.8a					
10: Square Root Functions and Geometry	N.RN.2 , N.Q.3 , A.CED.2 , A.REI.10 , F.IF.4 , F.IF.7b , 8.G.6 , 8.G.7 , 8.G.8				6 1 1
11: Rational Equations and Functions	A.SSE.2 , A.CED.1 , A.CED.2 , A.REI.10 , F.BF.4a				4 2
12: Data Analysis and Displays	N.Q.3 , 8.SP.1 , 8.SP.2 , 8.SP.3 , 8.SP.4 , S.ID.1 , S.ID.2 , S.ID.3 , S.ID.5 , S.ID.6a , S.ID.6b , S.ID.6c , S.ID.7 , S.ID.8 , S.ID.9				4 3 2
Interim 4 Free Response Question: F.IF.4 , S.ID.7 , S.ID.8 , S.ID.9					

Algebra I Standards

Standard (3.0)	Standard Scaffolding	Big Ideas Algebra I
8.EE.C.8 -- 8.EE.C.8a -- 8.EE.C.8b -- 8.EE.C.8c	Recognize and recall specific terminology such as: System of Linear Equations; Intersection. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain how a line represents the infinite number of solutions to a linear equation with two variables; use algebraic reasoning (simple substitution) and the properties of real numbers to simplify linear equations.	Chapter 4, Lesson 1, Lesson 2, Lesson 3, Lesson 4
8.F.A.1	Recognize and recall specific terminology such as: Function, Input, Output. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Find the output of a function when specific inputs are provided.	Chapter 5, Lesson 1, Lesson 2
8.F.A.2	Recognize and recall specific terminology such as: Linear Function, Rate of Change. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Determine the properties of a function written in algebraic form, in table format and represented on a graph (e.g., rate of change, meaning of y-intercept, linear, non-linear).	Chapter 5, Lesson 4, Chapter 6, Lesson 5
8.F.A.3	Recognize and recall specific terminology such as: Linear Function. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain that linear functions form a straight line and nonlinear functions do not form a straight line.	Chapter 2, Lesson 5, Chapter 5, Lesson 3, Lesson 5
8.F.B.4	Recognize and recall specific terminology such as: Linear Function, Rate of Change. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Define the y-intercept in relation to the situation.	Chapter 2, Lesson 7, Chapter 5, Lesson 3
8.F.B.5	Recognize and recall specific terminology such as: Increasing, Decreasing, Linear, Nonlinear. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Match the graph of function to a given situation.	Chapter 5, Lesson 5, Chapter 8, Lesson 1, Lesson 3
8.G.B.6	Recognize and recall specific terminology such as: Pythagorean Theorem, Leg, Hypotenuse, Converse. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Use visual models to demonstrate the relationship of the three side lengths of any right triangle.	Chapter 10, Lesson 3, Lesson 4
8.G.B.7	Recognize and recall specific terminology such as: Pythagorean Theorem, Leg, Hypotenuse. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Draw a diagram to set up the equation to solve for the unknown side length of a right triangle.	Chapter 10, Lesson 3, Lesson 4
8.G.B.8	Recognize and recall specific terminology such as: Pythagorean Theorem, Leg, Hypotenuse. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Connect any two points on a coordinate grid to a third point so that the three points form a right triangle.	Chapter 10, Lesson 4
8.SP.A.1	Recognize and recall specific terminology such as: Scatter Plot, Bivariate, Clustering, Outliers, Positive and Negative Association, Linear and Nonlinear Association, Trend Line, Line of Best Fit. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Plot ordered pairs on a coordinate grid representing the relationship between two data sets.	Chapter 12, Lesson 5
8.SP.A.2	Recognize and recall specific terminology such as: Scatter Plot, Linear and Nonlinear Association, Trend Line, Line of Best Fit. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Know that straight lines are widely used to model relationships between two quantitative variables. For scatter plots that suggest a linear association, informally fit a straight line.	Chapter 12, Lesson 5
8.SP.A.3	Recognize and recall specific terminology such as: Bivariate, Linear and Nonlinear Association, Trend Line, Line of Best, Slope, Y-Intercept. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Intercept the y-intercept of the equation in the context of the collected data; interpret the slope of the equation in the context of the collected data.	Chapter 12, Lesson 5
8.SP.A.4	Recognize and recall specific terminology such as: Bivariate, Categorical Data, Two-Way Table, Frequency, Relative Frequency. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Create a two-way table to record the frequencies of bivariate categorical values.	Chapter 12, Lesson 7

Standard (3.0)	Standard Scaffolding	Big Ideas Algebra I
HSN-RN.A.1	Recognize and recall specific terminology such as: Exponent, Rational, Expression, Integer. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify a method for finding the square roots of numbers; apply the properties of exponents to simplify algebraic expressions with rational exponents.	Chapter 6, Lesson 3
HSN-RN.A.2	Recognize and recall specific terminology such as: Exponent, Rational, Expression, Integer, Extraneous Solution. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Apply the properties of exponents to simplify algebraic expressions with rational exponents; apply the properties of exponents to simplify algebraic expressions with integer exponents; Apply the properties of exponents to simplify algebraic expressions with rational exponents.	Chapter 6, Lesson 2, Lesson 3, Chapter 10, Lesson 2
HSN-RN.B.3	Recognize and recall specific terminology such as: Real Number, Rational Number, Irrational Number. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Know how to find the square root of a perfect square; use the order of operations to evaluate expressions; classify real numbers as rational or irrational according to their definitions.	Chapter 6, Lesson 1
HSN-Q.A.1	Recognize and recall specific terminology such as: Scale, Origin. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Label units through multiple steps of a problem; choose appropriate units for real world problems involving formulas; choose an appropriate scale and origin for graphs and data displays.	Found throughout.
HSN-Q.A.2	Recognize and recall specific terminology such as: Descriptive Model. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify or choose the appropriate unit of measure for each variable or quantity.	Found throughout.
HSN-Q.A.3	Recognize and recall specific terminology such as: Accuracy. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Report calculated quantities using the same level of accuracy as used in the problem statement.	Found throughout.
HSA-SSE.A.1 -- HSA-SSE.A.1a -- HSA-SSE.A.1b	Recognize and recall specific terminology such as: Expression, Term, Factor, Coefficient, Equivalent. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Know how to identify the terms and like terms in an algebraic expression; group the parts of an expression differently in order to better interpret their meaning.	Chapter 6, Lesson 5, Lesson 6, Chapter 7, Lesson 1
HSA-SSE.A.2	Recognize and recall specific terminology such as: Equivalent, Polynomials. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Look for and identify clues in the structure of expressions (e.g., like terms, common factors, difference of squares, perfect squares) in order to rewrite it another way; explain why equivalent expressions are equivalent.	Chapter 7, Lesson 9, Chapter 11, Lesson 3, Lesson 4, Lesson 5, Lesson 6
HSA-SSE.B.3 -- HSA-SSE.B.3a -- HSA-SSE.B.3b -- HSA-SSE.B.3c	Recognize and recall specific terminology such as: Quadratic Expression, Complete The Square, Exponential Function, Function. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Predict whether a quadratic will have minimum or maximum based on the value of a; identify and factor perfect-square trinomials; define an exponential function, $f(x) = abx$.	Chapter 7, Lesson 6, Lesson 7, Lesson 8, Lesson 9, Chapter 9, Lesson 3
HSA-APR.A.1	Recognize and recall specific terminology such as: Polynomial, Integers, Closure Property, Foil Method. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify the like terms in an algebraic expression; use models to add, subtract and multiply polynomials (like terms).	Chapter 7, Lesson 2, Lesson 3, Lesson 4
HSA-CED.A.1	Recognize and recall specific terminology such as: Linear, Quadratic, Rational, Exponential. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify the variables and quantities represented in a real-world problem; determine the best model for the real-world problem (linear equation, linear inequality, quadratic equation, quadratic inequality, rational equation, exponential equation).	Chapter 1, Lesson 1, Lesson 2, Lesson 3, Chapter 3, Lesson 1, Lesson 2, Lesson 3, Lesson 4, Chapter 11, Lesson 7
HSA-CED.A.2	Recognize and recall specific terminology such as: Linear, Quadratic, Coordinate Axes. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify the variables and quantities represented in a real-world problem; determine the best model for the real-world problem (linear equation, linear inequality, quadratic equation, quadratic inequality, rational equation, exponential equation); set up coordinate axes using an appropriate scale and label the axes.	Chapter 2, Lesson 1, Lesson 3, Lesson 4, Lesson 5, Lesson 6, Lesson 7

Standard (3.0)	Standard Scaffolding	Big Ideas Algebra I
HSA-CED.A.3	Recognize and recall specific terminology such as: Linear, Quadratic, Coordinate Axes, Constraints, Solutions. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify the variables and quantities represented in a real-world problem; determine the best model for the real-world problem (linear equation, linear inequality, quadratic equation, quadratic inequality, rational equation, exponential equation); identify the system of equations and/or inequalities that best models the problem.	Chapter 2, Lesson 5, Chapter 3, Lesson 1, Lesson 2, Lesson 3, Lesson 4, Chapter 4, Lesson 1, Lesson 2, Lesson 3, Lesson 4, Lesson 5
HSA-CED.A.4	Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Know the common formulas for area, perimeter, and volume.	Chapter 1, Lesson 4
HSA-REI.A.1	Recognize and recall specific terminology such as: Solutions. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Apply order of operations and inverse operations to solve equations.	Chapter 1, Lesson 1, Lesson 2, Lesson 3
HSA-REI.B.3 -- HSA-REI.B.3a -- HSA-REI.B.3b	Recognize and recall specific terminology such as: Linear Equation, Linear Inequality, Coefficient. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Solve simple linear equations and inequalities for one variable.	Chapter 1, Lesson 1, Lesson 2, Lesson 3, Chapter 3, Lesson 2, Lesson 3, Lesson 4, Chapter 6, Lesson 4
HSA-REI.B.4 -- HSA-REI.B.4a -- HSA-REI.B.4b -- HSA-REI.B.4c	Recognize and recall specific terminology such as: Quadratic Equation, Quadratic Formula, Radicand, Perfect Square Trinomial, Imaginary Number, Factoring Completely. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify a quadratic equation, $ax^2 + bx + c$; Identify a perfect-square trinomial by first noticing if a and c are perfect squares and if $b=2ac$; Explain that complex solutions result when the radicand is negative in the quadratic formula ($b^2 - 4ac < 0$).	Chapter 7, Lesson 5, Lesson 6, Lesson 7, Lesson 8, Lesson 9, Chapter 9, Lesson 1, Lesson 2, Lesson 3, Lesson 4
HSA-REI.C.5	Recognize and recall specific terminology such as: System of Equations, Equivalent Equations, Elimination Method. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Recall the equivalent equations result when an equation is multiplied by the same number on both sides of the equal sign.	Chapter 4, Lesson 3
HSA-REI.C.6	Recognize and recall specific terminology such as: System of Equations, Elimination Method, Substitution Method, Intersection. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain why some linear systems have no solutions and identify linear systems that have no solution; explain why some linear systems have infinitely many solutions and identify linear systems that have infinitely many solutions.	Chapter 4, Lesson 1, Lesson 2, Lesson 3, Lesson 4
HSA-REI.D.7	Recognize and recall specific terminology such as: System of Equations, Substitution Method, Intersection, Linear Equation, Quadratic Equation. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Distinguish between equations that are linear and those that are quadratic.	Chapter 9, Lesson 5
HSA-REI.D.10	Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Verify that any point on a graph will result in a true equation when their coordinates are substituted into the equation.	Chapter 2, Lesson 1, Lesson 3, Lesson 4, Lesson 6, Chapter 11, Lesson 1, Lesson 2
HSA-REI.D.11	Recognize and recall specific terminology such as: Polynomial Function, Rational Function, Absolute Value Function, Exponential Function, Logarithmic Function. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain that a point of intersection on the graph of a system of equations, $y=f(x)$ and $y=g(x)$, represents a solution to both equations.	Chapter 6, Lesson 4, Chapter 9, Lesson 1
HSA-REI.D.12	Recognize and recall specific terminology such as: Half-Plane, Boundary. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain that the solution set for a system of linear inequalities is the intersection of the shaded regions (half-planes) of both inequalities; check points in the intersection of the half-planes to verify that they represent a solution to the system.	Chapter 3, Lesson 5, Chapter 4, Lesson 5
HSF-IF.A.1	Recognize and recall specific terminology such as: Domain, Range, Function, Input, Output, Element, Function Notation. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Define a function as a relation in which each input (domain) has exactly output (range); Explain that when x is an element of the input of a function, $f(x)$ represents the corresponding output of the function; Explain that function notation is not limited to $f(x)$; other letters (e.g., $g(x)$ and $p(x)$) can also be used so we can tell different function apart.	Chapter 5, Lesson 1, Lesson 2, Lesson 4

Standard (3.0)	Standard Scaffolding	Big Ideas Algebra I
HSF-IF.A.2	Recognize and recall specific terminology such as: Domain, Function, Input, Output, Function Notation. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Use order of operations to evaluate a function for a given domain (input) value; Convert a table, graph, set of ordered pairs, or description into function notation by identifying the rule used to turn inputs into outputs and writing the rule.	Chapter 5, Lesson 4
HSF-IF.A.3	Recognize and recall specific terminology such as: Domain, Range, Function, Sequence, Explicit Formula, Recursive Formula. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Convert a list of number (a sequence) into a function by making the whole numbers (0,1,2,etc.) the inputs and the elements of the sequence the outputs.	Chapter 5, Lesson 6, Chapter 6, Lesson 7
HSF-IF.B.4	Recognize and recall specific terminology such as: Interval, Maximum, Minimum, End Behavior, Periodicity. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Locate the information that explains what each quantity represents; identify the y-intercept; locate the information that explain what each quantity represents.	Chapter 2, Lesson 2, Lesson 3, Lesson 4, Lesson 6, Lesson 7, Chapter 8, Lesson 2, Lesson 4, Lesson 5, Chapter 10, Lesson 1
HSF-IF.B.5	Recognize and recall specific terminology such as: Function, Domain. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain how the domain of the function is represented in its graph.	Chapter 5, Lesson 1, Lesson 2
HSF-IF.B.6	Recognize and recall specific terminology such as: Interval, Function, Rate of Change. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain the connection between average rate of change and the slope formula: $\Delta y / \Delta x$.	Chapter 2, Lesson 2, Lesson 6, Chapter 8, Lesson 5
HSF-IF.C.7 -- HSF-IF.C.7a -- HSF-IF.C.7b -- HSF-IF.C.7e	Recognize and recall specific terminology such as: End Behavior, Logarithmic Function. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Identify the x-intercept(s), y-intercept, increasing intervals, decreasing intervals, the maximums, and minimums of a function by looking at its graph; Identify that the parent function for lines is the line $f(x) = x$; Identify the slope-intercept form of a linear function as $F(x) = mx + b$; Explain that the parent function for quadratic functions is the parabola $f(x) = x^2$; Find the y-intercept of a quadratic by substituting 0 for x and evaluating; Explain that the parent function for square root functions is the function $f(x) = \text{square root of } x$; Define piecewise functions as functions that have different rules for evaluation depending on the value of the input; Explain that the parent function for exponentials is $f(x) = bx$ where b is a positive number.	Chapter 5, Lesson 4, Chapter 6, Lesson 4, Lesson 5, Lesson 6, Chapter 8, Lesson 4, Lesson 5, Chapter 10, Lesson 1
HSF-IF.C.8 -- HSF-IF.C.8a -- HSF-IF.C.8b	Recognize and recall specific terminology such as: Exponential Growth and Decay, Algebraically, Graphically, Numerically. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain that standard form for a quadratic function is $f(x) = ax^2 + bx + c$; Explain that factored form is $f(x) = a(x-x_1)(x-x_2)$ where x_1 and x_2 are x-intercepts of the function; Distinguish between exponential functions that model exponential growth and exponential decay.	Chapter 9, Lesson 3
HSF-IF.C.9	Perform basic processes and recognize and recall the accuracy of basic solutions and information such as:	Chapter 5, Lesson 4, Chapter 6, Lesson 5
HSF-BF.A.1 -- HSF-BF.A.1a -- HSF-BF.A.1b	Recognize and recall specific terminology such as: Parent Function, Composition of Functions, Transformation. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Define explicit and recursive expressions of a function; identify the quantities being compared in real-world problems.	Chapter 5, Lesson 3
HSF-BF.A.2	Recognize and recall specific terminology such as: Arithmetic Sequence, Geometric Sequence, Recursive Formula, Explicit Formula. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Explain that recursive formula tells me how a sequence starts and tells me how to use the previous value(s) to generate the next element of the sequence; Explain that an explicit formula allows me to find any element of a sequence without knowing the element before it. (e.g., if I want to know the 11th number on the list, I plug the number 11 into the explicit formula); Define an arithmetic sequence as a sequence of numbers that is formed so that the difference between consecutive terms is always the same known as a common difference; Define a geometric sequence as a sequence of numbers that is formed so that the ratio of consecutive terms is always the same known as a common ratio.	Chapter 5, Lesson 6, Chapter 6, Lesson 7

Standard (3.0)	Standard Scaffolding	Big Ideas Algebra I
HSF-BF.B.3	Recognize and recall specific terminology such as: Function, Even and Odd Formulas, Inverse. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Describe the transformation that changed a graph of $f(x)$ into a different graph when given pictures of the pre-image and image.	Chapter 5, Lesson 4, Chapter 6, Lesson 4, Chapter 8, Lesson 1, Lesson 3, Lesson 4
HSF-BF.B.4 -- HSF-BF.B.4a	Recognize and recall specific terminology such as: Function, Inverse. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Define the inverse of a function; Explain that after solving $f(x)=c$ for x , c can be considered the input and x can be considered the output. .	Chapter 11, Lesson 2
HSF-LE.A.1 -- HSF-LE.A.1a -- HSF-LE.A.1b -- HSF-LE.A.1c	Recognize and recall specific terminology such as: Linear Function, Exponential Function, Rate of Change, Slope, Common Ratio. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Define linear function ($y=mx + b$) and exponential function ($y=abx$); Determine if a function has a constant rate of change or a constant multiplier over equal intervals.	Chapter 5, Lesson 5, Chapter 6, Lesson 4
HSF-LE.A.2	Recognize and recall specific terminology such as: Arithmetic Sequence, Geometric Sequence Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Construct linear functions given a graph, description of a relationship, or two-input-output pairs.	Chapter 5, Lesson 3, Lesson 6, Chapter 6, Lesson 4, Lesson 7
HSF-LE.A.3	Recognize and recall specific terminology such as: Polynomial Function Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Observe that exponentially increasing functions eventually exceed linear functions.	Chapter 8, Lesson 5
HSF-LE.B.5	Recognize and recall specific terminology such as: Linear Function, Exponential Function Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Interpret the parameters in a linear function in terms of context.	Chapter 2, Lesson 3, Chapter 6, Lesson 4
HSS-ID.A.1	Recognize and recall specific terminology such as: Dot Plot, Histogram, Box Plot Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Represent data with dot plots.	Chapter 12, Lesson 1, Lesson 3, Lesson 4, Lesson 8
HSS-ID.A.2	Recognize and recall specific terminology such as: Interquartile Range, Standard Deviation Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Use statistics to compare center and spread of two data sets.	Chapter 12, Lesson 1, Lesson 2, Lesson 3, Lesson 4
HSS-ID.A.3	Recognize and recall specific terminology such as: Outliers Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Interpret differences in shape, center, or spread in the context of data sets.	Chapter 12, Lesson 1, Lesson 2, Lesson 3, Lesson 4
HSS-ID.B.5	Recognize and recall specific terminology such as: Two-Way Tables Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Summarize categorical data for two categories in two-way frequency tables.	Chapter 12, Lesson 7
HSS-ID.B.6 -- HSS-ID.B.6a -- HSS-ID.B.6b -- HSS-ID.B.6c	Recognize and recall specific terminology such as: Scatter Plot, Linear Association Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Represent data on two quantitative variables on a scatter plot.	Chapter 12, Lesson 5, Lesson 6
HSS-ID.C.7	Recognize and recall specific terminology such as: Slope, Intercept Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Interpret slope or intercept in a linear model.	Chapter 12, Lesson 5
HSS-ID.C.8	Recognize and recall specific terminology such as: Correlation Coefficient Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: compute the correlation coefficient of a linear fit using technology.	Chapter 12, Lesson 6
HSS-ID.C.9	Recognize and recall specific terminology such as: Correlation, Causation. Perform basic processes and recognize and recall the accuracy of basic solutions and information such as: Recognize that correlation does not imply causation is not illustrated on a scatter plot. Describe correlation or causation.	Chapter 12, Lesson 6

Sample ELA Lesson Plans

Time Stamps		Day 1 – Skill Lesson/Main Selection
Unit/Week		Unit 1 – Week 1– “Sam, Come Back!”
Standard		RL.1.3
Skill Focus		Draw conclusions about character traits
I Can Statement		I can draw conclusions about the traits of characters in a story.
Before Reading		
	Phonics & Fluency Quick Drill	
1 minute	Introduce Text	Say: Today, we’re going to read a realistic fiction story called, “Sam, Come Back!” written by Susan Stevens Crummel and illustrated by Janet Stevens. This story is a realistic fiction story. It is a pretend story, but the things that happen could happen in real life.
7 minutes	Skill Focus Introduction & Check for Understanding	<p>[Build an anchor chart]</p> <p>Say: (What) As we read this story today, we’re going to draw conclusions about character traits. Character traits are what a character is like.</p> <p>Say: (How) To draw conclusions about a character’s traits we:</p> <ol style="list-style-type: none"> 1. Look for clues in the pictures and the text about what the character is saying and doing. 2. Ask ourselves, “What does that tell us about what they are like?” <p>Say: (Why) Good readers draw conclusions about character traits to help them learn more about the characters.</p> <p>Check for understanding:</p> <ul style="list-style-type: none"> • What skill are we focusing on? (<i>Character traits</i>) • How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, “What does this tell us about what they are like?”</i>) • Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)
3 minutes	Teacher Modeling & Check for Understanding - General example - Previous text	<p>Say: There are different kinds of character traits. Some examples are (build a character trait wall and post the traits as you introduce them all week):</p> <ul style="list-style-type: none"> • Caring: Someone who does nice things for other people is caring. • Smart: Someone who knows a lot of information is smart. • Brave: Someone who does not get scared, is brave. • Mischievous: Someone who gets into lots of trouble <p><i>**See character trait cards attached to the lesson plan</i></p> <p>Teacher Model:</p> <p>Say: The main selection read last week was called, “Farmer’s Market.” (<i>Student edition page 148</i>) The main characters in the story were Pam and Dad. On page 154 of the story Dad got a big bag and zipped all of the things they bought. Thinking about how dad is acting I can draw the conclusion that Pam’s dad is helpful.</p>

		<p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill did I just use as a good reader? (<i>You drew a conclusion about a character's traits.</i>) • How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>) • Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)
5 minutes	Explicit Selection Vocabulary Instruction (when appropriate)	<p>Words to teach: <u>Sam</u>: the name of the cat in the story <u>Jack</u>: the name of the boy in the story</p> <p>Say: In our story today, we have some words that you may never have heard before. Let's learn them together to help us understand the story.</p> <p>The first word is Jack. Say it. (Students chorally say the word). Jack is the name of the boy in the story.</p> <p>The next word is Sam. Say it. (Students chorally say the word). Sam is the name of the cat in the story.</p> <p>Sam and Jack are playing together with a ball of yarn. Have the students turn to a partner and use Sam and Jack in a sentence.</p>
During Reading		
5 minutes	Think Aloud & Check for Understanding	<p>Say: Now we are going to read, "Sam, Come Back!" I'm going to be looking for readers who follow along and track as I read. Remember as we read we are thinking about the traits of the characters in the story.</p> <p>[Stop at page 22] Say: Remember, Sam is the name of the cat in the story.</p> <p>Say: I want to stop here and spend some time thinking about character traits. On page 22 I see that Sam the cat is sitting on the woman's lap and they both are smiling. I can draw the conclusion that Sam the cat is friendly because he is sitting on the woman's lap happily.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill did I just use as a good reader? (<i>You drew a conclusion about a character's traits.</i>) • How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>) • Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)
10 minutes	Guided Skill-Aligned Comprehension Questions	<p>[Stop reading after page 25] How would you describe Sam now? (<i>Sample response: I would describe Sam as fast. He is able to run away from the boy and the dog and not be caught.</i>)</p>

		<p>Scaffolded Questions:</p> <ul style="list-style-type: none"> • Why is Sam running away? (<i>Sam is running away because he took the woman's yarn.</i>) • Do you have a pet at home? How would you describe them? [TPS-- 10 sec each] <p>Closing the Loop</p> <ul style="list-style-type: none"> • Character traits describe what a character is like. <ul style="list-style-type: none"> ○ Have students repeat that statement <p>[Stop reading after page 28] Say: How does the woman describe Sam on page 28? (<i>The woman calls Sam bad.</i>)</p> <p>Scaffolded Questions:</p> <ul style="list-style-type: none"> • Why did the woman call Sam a bad cat? (<i>Sam took her yarn and ran away and hid.</i>) • How would you feel if your cat hid from you? [TPS-- 10 sec each] <p>Closing the Loop</p> <ul style="list-style-type: none"> • Character traits describe what a character is like. <ul style="list-style-type: none"> ○ Have students repeat that statement <p>[Stop reading after the word Jack on page 29] Say: Remember, Jack is the name of the boy in the story.</p> <p>[Finish reading the text]</p>
2 minutes	Spiral Review Questions	<p>Setting [Stop after page 23] [Setting] What is the setting of the story? (<i>The setting is inside a house.</i>)</p> <p>[Stop after page 24] [Setting] How has the setting changed in the story? (<i>The setting in the beginning of the story was inside a house. Now the setting is outside.</i>)</p>
After Reading		
6 minutes	Independent Practice	<p>Say: Now you are going to practice drawing conclusions about character traits on your own. (provide pencil and paper) You will write your constructed response on this piece of paper. [provide response time and circulate to provide feedback]</p> <ul style="list-style-type: none"> • Look back at the pictures in the story "Sam Come Back." How would you describe the dog based on these pictures? (<i>The dog in the story is very helpful. He helps look for Sam when he ran away and doesn't stop looking until he comes back.</i>)

1 minute	Closing	<p>Say: You did a fantastic job practicing our skill for the day! We will continue working on this tomorrow with a new story and new characters.</p> <p>Check for understanding:</p> <ul style="list-style-type: none"> • What skill did we focus on today? (<i>Character traits</i>) • How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>) • Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)
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1–2 Constructed Response Writing

Name: _____

Date: _____

Directions: Use text evidence to answer the questions below.**Prompt:** Look back at the pictures in the story “Sam Come Back.” How would you describe the dog based on these pictures?**Restate & Answer**

Restate and answer the question in one sentence

Cite

Give an example from the text

Sentence starters:

- Page __ says, “__.”
- The author wrote, “__.”
- An example in the text is, “__.”

Explain

Explain how your example supports your answer

Sentence starters:

- This means __.
- This shows that __.

Time Stamps		Day 2 – On Level Reader	
Unit/Week		Unit 1 – Week 1– Day 2	
Standard		RL.1.3	
Skill Focus		Draw conclusions about character traits	
I Can Statement		I can draw conclusions about the traits of characters in a story.	
Before Reading			
	Phonics & Fluency Quick Drill		
1 minute	Introduce Text	<p>Say: Today, we’re going to read a new story called, “Mack and Zack” by Ann Rossi and illustrated by Chi Chung. This story is a realistic fiction story. It is a pretend story, but the things that happen could happen in real life.</p> <p>Read the title with me. (students chorally read title)</p>	
4 minutes	Skill Focus Check for Understanding	<p>Say: As we read, we are going to practice the same skills from yesterday.</p> <p>Revisit previous day’s skills [revisit anchor chart]:</p> <ul style="list-style-type: none"> • What skill did we focus on yesterday? (<i>Character traits</i>) • How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, “What does this tell us about what they are like?”</i>) • Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>) 	
During Reading			
	First Read	<p>Say: First, we will read the text silky-smooth by keeping a steady pace and briefly pausing at commas and punctuation. Be sure to pay attention to what is happening in the story as well.</p> <p>Say: I will start reading while you follow along. When I say, ‘together,’ we will chorally read as one super-strong voice.</p> <p>Teacher reads pages 1-2. Students join chorally for pages 3-4. Teacher reads pages 5-6. Students join chorally for pages 7-8.</p>	
5 minutes	Think Aloud and Check for Understanding	<p>Say: Now we have read the whole story I want to spend some time thinking about the character traits I noticed while reading.</p> <p>Say: Turn back to page 3. Looking at the illustration I can see the boy and the cat are in the living room. I know that I can draw conclusions about a character’s traits because of what they are doing and saying in the story. In this picture Mack and Zack are hugging each other. Based on this I can draw the conclusion that Mack and Zack are friendly.</p> <p>Check for understanding after think aloud:</p> <ul style="list-style-type: none"> • What skill did I just use as a good reader? (<i>You drew a conclusion about a character’s traits.</i>) • How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, “What does this tell us about what they are like?”</i>) 	

		Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)
13 minutes	Guided Skill-Aligned Comprehension Questions	<p>Say: Now, you are going to independently read the story again.</p> <p>(students sticky note stopping locations on pages 3, 5, and 6)</p> <p>[Stop reading after page 5] How would you describe Mack based on his actions on pages 4 and 5? (<i>I would describe Mack as hungry and tired.</i>)</p> <p>Scaffolded Questions:</p> <ul style="list-style-type: none"> • Where does Mack sleep? (<i>Mack sleeps on a mat.</i>) • Where do you think Zack is while Mack is napping? [TPS-- 10 sec each] <p>Closing the Loop</p> <ul style="list-style-type: none"> • Mack is hungry and tired. <ul style="list-style-type: none"> ○ Have students repeat that statement <p>[Stop reading after page 6] How do you think Mack and Zack feel about each other? How do you know? (<i>I think that Mack and Zack like each other. I know this because they spend time together and Zack wants Mack to come to him. The illustration shows Mack and Zack smiling at each other.</i>)</p> <p>Scaffolded Questions:</p> <ul style="list-style-type: none"> • What are the characters doing on page 6? (<i>Zack is sitting in the chair looking at Mack. Mack is coming over to Zack.</i>) • Do you have a pet? How do you feel about them? [TPS-- 10 sec each] <p>Closing the Loop</p> <ul style="list-style-type: none"> • Mack and Zack care for each other. <ul style="list-style-type: none"> ○ Have students repeat that statement <p>[Finish reading the text]</p>
5 minutes	Spiral Review Questions	<p>Setting [Stop after page 3]</p> <ul style="list-style-type: none"> • [Setting] What is the setting in this story? How do you know? (<i>The setting is in a living room inside a house. I know this because I see a couch and coffee table.</i>)
After Reading		
10 minutes	Independent Practice	<p>Say: Now you are going to practice drawing conclusions about character traits on your own. (provide pencil and paper) You will write your constructed response on this piece of paper. [provide response time and circulate to provide feedback]</p> <p>What are two words you would use to describe Mack based on what you read in "Zack and Mack?" Why would you describe him this way? (<i>Answers will vary.</i>)</p>

		<p><i>Response could include: Mack is friendly because he likes to be held by Zack. He is also a good listener because he always comes when Zack calls him.)</i></p>
<p>2 minutes</p>	<p>Closing</p>	<p>Say: Wow! You did awesome practicing our skill again! We will continue working on this tomorrow with a new text.</p> <p>Check for understanding:</p> <ul style="list-style-type: none"> • What skill did we focus on today? (<i>Character traits</i>) • How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>) • Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)

Time Stamps		Day 3 – Below Level Reader
Unit/Week	Unit 1 – Week 1– Day 3	
Standard	RL.1.3	
Skill Focus	Draw conclusions about character traits	
I Can Statement	I can draw conclusions about the traits of characters in a story.	
Before Reading		
	Phonics & Fluency Quick Drill	
1 minute	Introduce Text	<p>Say: I'm excited that today we are going to be reading a new story today! This story is called "Sam" by Alan Levine and illustrated by Phyllis Pollema-Cahill. This story is a realistic fiction story. It is a pretend story, but the things that happen could happen in real life.</p> <p>Read the title with me. (students chorally read title)</p>
4 minutes	Skill Focus Check for Understanding	<p>Say: As we read, we are going to practice the same skill from yesterday.</p> <p>Revisit previous day's skills [revisit anchor chart]:</p> <ul style="list-style-type: none"> • What skill did we focus on yesterday? (<i>We drew conclusions about a character's traits.</i>) • How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>) • Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)
During Reading		
7 minutes	First Read	<p>Say: First, we will read the text silky-smooth by keeping a steady pace and briefly pausing at commas and punctuation. Be sure to pay attention to what is happening in the story as well.</p> <p>Say: I will start reading while you follow along. When I say, 'together,' we will chorally read as one super-strong voice.</p> <p>Teacher reads pages 3-6. Students join chorally for pages 3-4. Teacher reads pages 5-6. Students join chorally for pages 7-8.</p>
3 minutes	Think Aloud and Check for Understanding	<p>Say: After reading the entire text I want to think about the characters and how I would describe them based on what they do and say. Let's turn back to page 4. On this page Sam came to Jack. Based on this page I can draw the conclusion that Sam is a friendly duck because he came to the boy and wasn't afraid like most ducks would be.</p> <p>Check for understanding after think aloud:</p> <ul style="list-style-type: none"> • What skill did I just use as a good reader? (<i>You drew a conclusion about a character's traits.</i>) • How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>) • Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)

10 minutes	Second Read Guided Skill-Aligned Comprehension Questions	<p>Say: Now, you are going to independently read the story again. As you read think about how you would describe the characters in the story.</p> <p>(students sticky note stopping locations on pages 5 and 6 prior to reading)</p> <p>[Stop reading after page 5] Say: How would you describe Sam based on his actions on page 5? (Sample response: <i>Sam is a curious because he walks in to the bathroom from outside.</i>)</p> <p><u>Scaffolded Questions:</u></p> <ul style="list-style-type: none"> • What are the characters doing on page 4? (<i>Sam and Jack are outside. Jack is coming to Sam.</i>) • Do you think Sam understands Jack when he tells him to come? [TPS – 10 sec each] <p>Closing the Loop</p> <ul style="list-style-type: none"> • Sam is a curious duck. <ul style="list-style-type: none"> ○ Have students repeat that statement <p>[Finish reading after page 6] How would you describe Sam based on his actions on page 6? (Sample response: <i>Sam is a brave because he swims in the bath tub.</i>)</p> <p><u>Scaffolded Questions:</u></p> <ul style="list-style-type: none"> • What is in the tub with Sam? (<i>There is a toy boat and a rubber duck in the tub with Sam.</i>) • Would you like a duck for a pet? [TPS- 10 sec each] <p>Closing the Loop</p> <ul style="list-style-type: none"> • Sam is a brave duck. <p>Have students repeat that statement</p> <p>[Finish reading the text]</p>
3 minutes	Spiral Review Questions	<p>Setting [Stop after page 5]</p> <ul style="list-style-type: none"> • [Setting] What are the settings of the story on pages 4 and 5? (<i>The setting on page 4 is outside. The setting on page 5 is inside of a bathroom.</i>)
After Reading		
10 minutes	Independent Practice	<p>Say: Now you are going to practice drawing conclusions about character traits on your own. (provide pencil and paper) You will write your constructed response on this piece of paper. [provide response time and circulate to provide feedback]</p> <p>Look back at the pictures in the story “Sam.” How would you describe Jack based on his actions? <i>Answers will vary. Sample response: Sam is helpful. He helps Sam to the tub and gives him a bath. He also helps Sam get a snack</i></p>
2 minutes	Closing	<p>Say: Wow! You did awesome practicing our skill again! We will continue working on this tomorrow with a new story and new characters.</p>

		<p>Check for understanding:</p> <ul style="list-style-type: none">• What skill did we focus on today? (<i>We drew a conclusion about a character's traits.</i>)• How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>)• Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)
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Time Stamps		Day 4– Sleuth	
Unit/Week		Unit 1 – Week 1– Day 4	
Standard		RL.1.3	
Skill Focus		Draw conclusions about character traits	
I Can Statement		I can draw conclusions about the traits of characters in a story.	
Before Reading			
	Phonics & Fluency Quick Drill		
1 minute	Introduce Text	<p>Say: Today, we’re going to read a realistic fiction story titled, “Are You My Kitten?”</p> <p>Read the title with me. (students chorally read title)</p>	
4 minutes	Skill Focus Check for Understanding	<p>Say: As we read, we are going to practice the same skill(s) from yesterday.</p> <p>Revisit previous day’s skills [revisit anchor chart]:</p> <ul style="list-style-type: none"> • What skill did we focus on yesterday? (<i>Character traits</i>) • How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, “What does this tell us about what they are like?”</i>) • Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>) 	
During Reading			
4 minutes	First Read	<p>Say: First, I will read the text while you follow along.</p> <p>Teacher reads the text.</p>	
4 minutes	Second Read	<p>Say: Next, read it again independently. As you read think about how you would describe the characters.</p>	
15 minutes	Skill Aligned Question and Discussion	<p>Say: Who are the characters in this story? (<i>Kelly and three kittens.</i>)</p> <p>Scaffolded Questions:</p> <ul style="list-style-type: none"> • Why is Kelly with three kittens? (<i>She is trying to decide which kitten should be her pet.</i>) • Would you like to have a pet kitten? [TPS – 10 sec each] <p>Closing the Loop</p> <ul style="list-style-type: none"> • Kelly and three kittens are the characters in this story. <ul style="list-style-type: none"> ○ Have students repeat that statement <p>Say: How would you describe Kelly based on her actions in the story? (<i>Sample response: Kelly is very careful. She took her time to figure out which kitten would be best for her.</i>)</p> <p>Scaffolded Questions:</p> <ul style="list-style-type: none"> • Why did Kelly pick the third kitten? (<i>The kitten touched her hand with its paw.</i>) 	

		<ul style="list-style-type: none"> • What does Kelly want to do with her kitten at home? (<i>Kelly wants to feed her kitten and get him water. She wants to give him a place to sleep and play with him.</i>) <p>Closing the Loop</p> <ul style="list-style-type: none"> • Kelly is a careful person. <ul style="list-style-type: none"> ○ Have students repeat that statement
After Reading		
10 minutes	Independent Practice or additional Sleuth	<p>Say: Now you are going to practice drawing conclusions about character traits on your own. (provide pencil and paper) You will write your constructed response on this piece of paper. [provide response time and circulate to provide feedback</p> <ul style="list-style-type: none"> • How would you describe the kitten that Kelly chose to be her pet in the story? (<i>Sample response: The kitten that Kelly chose is a nice kitten. It is nice because it touched her hand with a soft paw.</i>)
2 minutes	Closing	<p>Say: You just practiced your skill with a difficult text. You did a lot of deep thinking! Kiss your brains!</p> <p>Check for understanding:</p> <ul style="list-style-type: none"> • What skill did we focus on today? (<i>We drew a conclusion about a character's traits.</i>) • How do you draw conclusions about character traits? (<i>Look for clues in the pictures and text about what the character is saying and doing. Then ask yourself, "What does this tell us about what they are like?"</i>) • Why do good readers draw conclusions about character traits? (<i>Good readers draw conclusions about character traits to help them learn more about the characters.</i>)

1-2 Constructed Response Writing

Name: _____

Date: _____

Directions: Use text evidence to answer the questions below.

Prompt: How would you describe the kitten that Kelly chose to be her pet in the story?

Restate & Answer

Restate and answer the question in one sentence

Cite

Give an example from the text

Sentence starters:

- Page __ says, “___.”
- The author wrote, “___.”
- An example in the text is, “___.”

Explain

Explain how your example supports your answer

Sentence starters:

- This means ___.
- This shows that ___.

caring



concerned for others

competitive



having a strong
desire to win

lonely



always feeling alone
and without friends

loving



showing warm
affection

brave



not afraid of anything

mean



not nice to others

courteous



considering other's feelings before doing or saying something

nervous



uneasy or scared

funny



being good at making others laugh

responsible



being dependable by doing the right things

grateful



appreciating the wonderful things in life

timid



shy

creative



uses imagination to
create new and unique
ideas

impatient



doesn't stay calm when
things don't go his/her way

bossy



likes to tell others what
to do

jealous



wants what others have

lazy



doesn't want to put energy into anything

thoughtful



showing consideration for others

mischievous



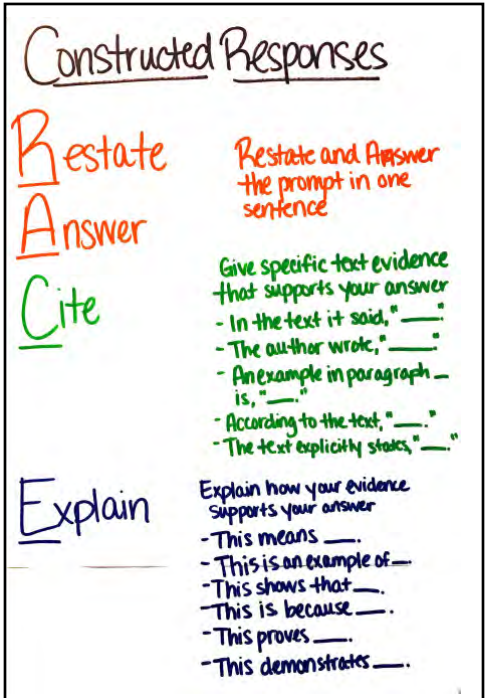
causes a lot of trouble

honest



always tells the truth

Constructed Responses are written responses to Reading Literature & Reading Informational text. Students will read text and respond to a prompt. Constructed responses are valuable and should be a regular practice because they support student comprehension and critical thinking about text.

Pacing Guide	Best Practice	
Between weeks 1-2 of school	<p>Build an anchor chart with your class that reflects the process they will take to complete a constructed response. Daily constructed responses will aid in their ability to successfully complete them.</p>  <p>The anchor chart is titled "Constructed Responses" and is divided into four sections: <ul style="list-style-type: none"> Restate: Restate and Answer the prompt in one sentence. Answer: Give specific text evidence that supports your answer. Examples include: "In the text it said, '...'", "The author wrote, '...'", "An example in paragraph ... is, '...'", "According to the text, '...'", and "The text explicitly states, '...'" Cite: (This section is empty in the image) Explain: Explain how your evidence supports your answer. Examples include: "This means ...", "This is an example of ...", "This shows that ...", "This is because ...", "This proves ...", and "This demonstrates ..." </p>	<p>Tips:</p> <ul style="list-style-type: none"> • Make the anchor chart with the class • Complete one letter of RACE on anchor chart each day <i>**Only add/practice RA until students are ready to begin CE</i> • Add sentence starters to the anchor chart
Between weeks 2-4	<p>Model Teacher models writing constructed responses using the RACE method with each day's prompt. The model assists students in understanding the expectations for CR writing.</p>	<p>Tips:</p> <ul style="list-style-type: none"> • Teacher thinks aloud while modeling • Teacher writes response using RACE anchor chart & CR handout • Students copy response on CR handout • Students score one CR based on 2-point rubric <i>** Start with RA until students are ready to add CE</i>
Between weeks 4-7	<p>Shared Writing Teacher facilitates a shared write of constructed responses using the RACE method with each day's prompt. Shared writing allows the teacher to guide student writing to meet expectations.</p>	<p>Tips:</p> <ul style="list-style-type: none"> • Teacher guides students through RACE method • Teacher references RACE anchor chart for sentence starters • Teacher writes response on CR template for students to copy (everyone has same response) • Students score one CR based on 2-point rubric <i>** Start with RA until students are ready to add CE</i>
Between weeks 7-10	<p>Independent Writing Students independently write constructed responses.</p>	<p>Tips:</p> <ul style="list-style-type: none"> • Teacher reads CR prompt to class • Teacher reminds students of expectations • Students write on CR handout • Students write using RACE method • Students score one CR based on 2-point rubric • Teacher circulates to provide feedback <i>** Start with RA until students are ready to add CE</i>

Scoring:

Constructed Response Rubric	
Score	Response Features
2 Points	<ul style="list-style-type: none"> • Accurate inferences and/or claims which include evidence or details from the text where required by the prompt • Relevant facts, concrete details, and/or other information from the text to develop a response according to the requirements of the prompt • Sufficient number of facts, concrete details, and/or other information from the text as required by the prompt • Grammatical errors do not impact readability
1 Point	<ul style="list-style-type: none"> • The response includes accurate inferences and/or claims but is not clearly text-based where required by the prompt. • Includes limited relevant facts, concrete details, and/or other information from the text to develop a response according to the requirements of the prompt • Grammatical errors may impact readability at times
0 Point	<ul style="list-style-type: none"> • A response that does not address any of the requirements of the prompt or is incomplete or totally inaccurate • A response that is completely unintelligible or indecipherable

Time Stamps		Day 1 – Skill Lesson/Main Selection, Part 1
Unit/Week	Unit 1 – Week 2 – Day 1 – “Lewis and Clark and Me”	
Standard	RI.4.1	
Skill Focus	Author’s Purpose	
I Can Statement	I can determine author’s purpose by identifying the information in the text and making inferences about it to find out the reasons it was written.	
Before Reading		
1 minute	Introduce Text	<p>Say: Today, we’re going to read a historical fiction text titled, “Lewis and Clark and Me” by Laurie Myers. Historical fiction includes some real people and real events, but the information is told in a story format.</p> <p>Read the title with me. (Students chorally read title.)</p>
7 minutes	Skill Focus Introduction & Check for Understanding	<p>[Build an anchor chart]</p> <p>Say: (What) This week we are going to determine the author’s purpose for writing a text. The author’s purpose is the reason or reasons an author has for writing.</p> <p>Say: (How) To determine author’s purpose we:</p> <ul style="list-style-type: none"> ● Identify what kind of information like facts, steps, feelings, and sensory details is shared in the text. ● Determine if that information is meant to: <ul style="list-style-type: none"> ○ Persuade ○ Inform ○ Explain ○ Entertain ○ Express ideas or feelings <p>Say: (Why) Determining author’s purpose helps you know why the text was written.</p> <p>Check for understanding:</p> <ul style="list-style-type: none"> ● What skill are we focusing on? (<i>author’s purpose</i>) ● What is author’s purpose? (<i>the reason(s) why an author wrote a text</i>) ● How do we determine author’s purpose? (<i>Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.</i>) ● Why do good readers determine the author’s purpose? (<i>Good readers determine author’s purpose to know why the text was written.</i>)
5 minutes	Teacher Modeling & Check for Understanding - General example - Previous text	<p>Say: There are different reasons why authors write. Those reasons are to:</p> <ul style="list-style-type: none"> ● Persuade: The author tries to convince the reader of something. ● Inform: The author gives information about a topic. ● Explain: The author gives directions or steps to follow. ● Entertain: The author writes something for the reader to enjoy. ● Express ideas or feelings: The author describes feelings and emotions to tell about a topic. <p>Say: Sometimes an author has more than one purpose when they write. They might want to entertain you AND persuade you.</p>

		<p>Teacher Model:</p> <p>Say: Last week we read, <i>Because of Winn-Dixie</i>. As I read, I thought about what the author’s purpose might be.</p> <p>Say: First, I thought about what kind of information was in that story. At the beginning there’s that funny part about how Miss Franny Block thinks Winn-Dixie is a bear. There was another funny part when Miss Franny told the story about asking her father for a small library.</p> <p>Say: Both of those parts in the story are fiction. They’re also funny. There are no facts in that part of the story, just details that made us laugh.</p> <p>Say: Because <i>Winn Dixie</i> has details that made us laugh, I can tell that the author’s purpose is to entertain.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill did I just use as a good reader? (<i>You determined the author’s purpose.</i>) • How did I do that? (<i>You thought about the text and figured out what kind of information it gave. That let you know the purpose of Winn-Dixie was to entertain.</i>)
3 minutes	Explicit Selection Vocabulary Instruction (when appropriate)	<p>Words to teach:</p> <ul style="list-style-type: none"> • <u>docks</u>: platforms built on the shore or out from the shore; wharves; piers • <u>wharf</u>: platform built on the shore or out from the shore; docks; piers • <u>yearned</u>: felt a longing or desire • <u>bargain</u>: a good value for the money • <u>mutual</u>: experienced by two or more people <p>Say: In our story today, there are some words that you might not have heard before. The story is historical and about exploration, so there are some words that are specific to that time and topic that you don’t know.</p> <p>The first word is docks. Say it. (Students chorally say the word). A dock is a platform built on the shore or out from the shore. What is a dock? Turn to a partner and use <i>dock</i> in a sentence.</p> <p>Repeat this structure for the other words.</p>
During Reading		
5 minutes	Think Aloud & Check for Understanding	<p>Say: Now we are going to start, “Lewis and Clark and Me”. (stop after page 56). I’m going to be looking for readers who follow along with their tracking finger as I read. Remember to pay attention to what information the author shares to help you decide what the purpose is.</p> <p>[Stop reading after the entry on the top of page 54]</p> <p>Say: The author is sharing historical facts. When an author shares factual and historical information, I know the purpose is to inform. The author’s purpose is to inform.</p>

		<p>[Continue reading until the end of page 54]</p> <p>Say: Another piece of information that I've figured out from what the author has shared is that the narrator of this story is a dog. That makes the story funny and interesting. The author's purpose must also be to entertain.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> ● What skill did I just use as a good reader? (<i>You determined author's purpose.</i>) ● How did I do that? (<i>You identified the information that the author shared in the text and made inferences about it. You determined that the information was meant to inform and entertain.</i>) ● What clues did I use to determine author's purpose? (<i>The information shared at the beginning gives the reader new information. The fact that the narrator is a dog is entertaining.</i>) ● Why did I determine that there was more than one author's purpose? (<i>Because sometimes authors have more than one reason for writing a text.</i>) <p>Closing the Loop</p> <ul style="list-style-type: none"> ● The author's purpose of <i>Lewis and Clark and Me</i> is to inform and entertain. <ul style="list-style-type: none"> ○ Have students repeat that statement
10 minutes	Guided Skill-Aligned Comprehension Questions	<p>[Stop reading after page 55]</p> <p>Say: What is the author's purpose in this part of the text? (<i>First, we identify the kind of information that is being shared. We learned that Newfoundland dogs have webbed toes and a double coat. These are factual details that give readers information about a specific kind of dog. That helps us determine that the author's purpose is to inform. We can also identify that the dog continues to narrate. This makes the story interesting for readers. That helps us determine that the author's purpose is also to entertain.</i>)</p> <p>Scaffolded Questions:</p> <ul style="list-style-type: none"> ● What new information was shared? (<i>Facts about Newfoundlands</i>) ● When facts are shared, what purpose does the author have? (<i>to inform me</i>) ● What makes this text enjoyable? (<i>The dog is telling the story</i>) ● When an author makes the text enjoyable, what purpose does he/she have? (<i>To entertain</i>) ● When an author shares facts in an enjoyable way, what two purposes does the author have for writing the text? (<i>To inform and entertain</i>) <p>Closing the Loop</p> <ul style="list-style-type: none"> ● The author's purpose of <i>Lewis and Clark and Me</i> is to inform and entertain. <ul style="list-style-type: none"> ○ Have students repeat that statement <p>[Stop reading after page 56]</p> <p>Say: How does this part of the story help verify the author's purpose? (<i>The information shared is a story of the dog showing off his ability to retrieve. He talks</i></p>

		<p><i>about being feeling proud. These parts of the story are enjoyable. That helps us determine that the author's purpose is to entertain. At the end of the selection, there's a diary entry from Lewis explaining that he decided to buy the dog. That is factual information from a historical document. The purpose of factual information is to inform.)</i></p> <p>Scaffolded Questions:</p> <ul style="list-style-type: none"> ● What new information was shared? <i>(A real diary entry from Lewis saying he bought the dog.)</i> ● When facts are shared, what purpose does the author have? <i>(to inform me)</i> ● What makes this text enjoyable? <i>(The dog is proud of himself for retrieving.)</i> ● When an author makes the text enjoyable, what purpose does he/she have? <i>(To entertain)</i> ● When an author shares facts in an enjoyable way, what two purposes does the author have for writing the text? <i>(To inform and entertain)</i> <p>Closing the Loop</p> <ul style="list-style-type: none"> ● The author's purpose of <i>Lewis and Clark and Me</i> is to inform and entertain. <ul style="list-style-type: none"> ○ Have students repeat that statement
2 minutes	Spiral Review Questions	<p>Character/Setting & Sequence of Events</p> <p>[Stop after page 54]</p> <ul style="list-style-type: none"> ● [summary] Summarize the events of the story so far. <i>(The dog, Seaman, is with his owner at the docks. The owner is trying to sell the dog. A man named Lewis is interested in Seaman and talks to his owner. Lewis also introduces himself to Seaman.)</i> <p>[Stop after page 55]</p> <ul style="list-style-type: none"> ● [Summary] Summarize the reasons why Seaman is the perfect dog to accompany Lewis on his trip. <i>(Seaman is a Newfoundland. His toes are webbed, making him a great swimmer able to rescue drowning men. He also has a waterproof, double coat to keep him warm in the water. A dog that is good in the water is perfect for an explorer.)</i>
After Reading		
6 minutes	Independent Practice	<p>Say: Now you are going to practice determining author's purpose. (provide CR template) You will write your constructed response on this piece of paper. As you respond, remember, think about the information that is shared and what it's meant to do for the reader. [provide response time and circulate to provide feedback]</p> <p>What is the author's purpose in this text? What information have you used to help you determine the author's purpose of the text so far? <i>(First, we identified the information that was shared. This story has real entries from Lewis's diary. Those give historical facts. We also learned facts about Newfoundland dogs. When factual information is shared, it means the author wants to teach the reader new things. This means the author's purpose is to inform. Lewis and Clark and Me also has information that we enjoyed. The narrator is a dog. The dog tells stories about trying to impress Lewis. The author made us enjoy the story with this information. That means the author's purpose was also to entertain.)</i></p>

1 minute	Closing	<p>Say: You did a fantastic job practicing our skill for the day! We will continue working on this tomorrow with a new story and new characters.</p> <p>Check for understanding:</p> <ul style="list-style-type: none"> ● What skill did we focus on today? (<i>author's purpose</i>) ● What is author's purpose? (<i>the reason the author wrote the text</i>) ● How do we determine author's purpose? (<i>Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.</i>) ● Why do good readers determine the author's purpose? (<i>Good readers determine author's purpose to know why the text was written.</i>)
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3-5 Constructed Response Writing

Name: _____

Date: _____

Directions: Using the space provided, answer the following question. Support your answer with evidence from the text.

Day 1 Prompt: What is the author's purpose in this text? What information have you used to help you determine the author's purpose of the text so far?

<p style="text-align: center;">Restate & Answer</p> <p style="text-align: center;"><i>Restate the prompt and answer the prompt in one sentence</i></p>	
<p style="text-align: center;">Cite</p> <p style="text-align: center;"><i>Give specific text evidence that supports your answer</i></p> <p>Sentence starters:</p> <ul style="list-style-type: none"> • In the text it said, "____." • The author wrote, "____." • An example in paragraph ____ is, "____." • According to the text, "____." • The text explicitly states, "____." • In paragraph ____, the author states, "____." 	
<p style="text-align: center;">Explain</p> <p style="text-align: center;"><i>Explain how your evidence supports your answer</i></p> <p>Sentence starters:</p> <ul style="list-style-type: none"> • This means ____. • This is an example of ____. • This shows that ____. • This is because ____. • This proves ____. • This demonstrates ____. 	

Time Stamps		Day 2 – Main Selection, Part 2
Unit/Week	Unit 1 – Week 2 – Day 2 – “Lewis and Clark and Me”	
Standard	RI.4.1	
Skill Focus	Author’s Purpose	
I Can Statement	I can determine author’s purpose by analyzing the information in the text to find out the reasons it was written.	
Before Reading		
1 minute	Introduce Text	<p>Say: Today, we’re going to continue reading from “Lewis and Clark and Me”. Let’s start by reviewing what we read yesterday.</p> <ul style="list-style-type: none"> • Turn and tell your partner the main events from the first part of story. [TPS – 10 sec each]
4 minutes	Skill Focus Check for Understanding	<p>Say: As we read, we are going to practice the same skill from yesterday.</p> <p>Revisit previous day’s skills [revisit anchor chart and reasons for writing]:</p> <ul style="list-style-type: none"> • What skill did we focus on yesterday? (<i>author’s purpose</i>) • What is author’s purpose? (<i>the reason the author wrote the text</i>) • How do we determine author’s purpose? (<i>Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.</i>) • Why do good readers determine the author’s purpose? (<i>Good readers determine author’s purpose to know why the text was written.</i>)
During Reading		
5 minutes	Think Aloud and Check for Understanding	<p>Say: Now we are going to read the second half of, “Lewis and Clark and Me” (start on page 57 and finish the story). I’m going to be looking for readers who follow along with their tracking finger as I read. Remember to pay attention to the information that is shared and how it helps reveal the author’s purpose.</p> <p>[Stop reading after page 57]</p> <p>Say: At this point, I’ve gotten some new information. The author shared that the boat is heading down the Ohio River. This is a real place, so this must be factual information. I know that when an author shares facts that the purpose is to inform. I also noticed that the author was sharing more personal information about the dog’s thoughts and feelings. The dog is excited about being on the water. These details are enjoyable. When I enjoy what I’m reading, I know the author’s purpose is to entertain.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill did I just use as a good reader? (<i>You determined author’s purpose.</i>) • How did I do that? (<i>You identified the information that the author shared in the text and made inferences about it. You determined that the information was meant to inform and entertain.</i>) • What clues did I use to determine author’s purpose? (<i>The information shared about the Ohio River informs the reader using new information. The fact that the narrator is a dog is entertaining.</i>) • Why did I determine that there was more than one author’s purpose? (<i>Because sometimes authors have more than one reason for writing a text.</i>) <p>Closing the Loop</p> <ul style="list-style-type: none"> • The author’s purpose of “Lewis and Clark and Me” is to inform and entertain. <ul style="list-style-type: none"> ○ Have students repeat that statement.

13 minutes	Guided Skill- Aligned Comprehension Questions	<p>[Stop reading after page 59]</p> <p>Say: What author’s purpose can be determined from pages 58-59? (<i>The information shared in the text describes the river as being shallow with not a very strong current. Also, we learn that the crew had to dig channels when the river was low or hire oxen to pull the boat. We also learn the information that it is unusual for squirrels to swim. All of this information is factual and helps us learn something new. When the author gives new information, the purpose is to inform. Some other information that is shared is that the dog is surprised by something. He really wants to go after the squirrels and does his best to get Lewis’s attention. This behavior is enjoyable. It’s also suspenseful. You wonder if the dog will get the squirrels. When the author includes information that is enjoyable and suspenseful, the purpose is to entertain.</i>)</p> <p><u>Scaffolded Questions:</u></p> <ul style="list-style-type: none"> ● What new information was shared? (<i>Facts about how the boat travelled in low water and about squirrels.</i>) ● When facts are shared, what purpose does the author have? (<i>to inform me</i>) ● What makes this text enjoyable? (<i>The dog is telling the story and he really wants to go after the squirrels.</i>) ● When an author makes the text enjoyable or suspenseful, what purpose does he/she have? (<i>To entertain</i>) ● When an author shares facts in an enjoyable or suspenseful way, what two purposes does the author have for writing the text? (<i>To inform and entertain</i>) <p>Closing the Loop:</p> <ul style="list-style-type: none"> ● The author’s purpose of “Lewis and Clark and Me” s to inform and entertain. <ul style="list-style-type: none"> ○ Have students repeat that statement. <p>[Stop reading after page 60]</p> <p>Say: What author’s purpose can be determined from page 60? (<i>The information shared in the text describes the dog jumping from the boat to get the squirrel. It also explains how the squirrel tried to get away. This scene was full of action. When an author includes action it makes the story enjoyable. The purpose of an enjoyable story is to entertain. The dog also shares that his webbed feet made swimming easy for him. This is a fact we learned earlier. Detailed facts help us learn something new. When an author shares facts, the purpose is to inform.</i>)</p> <p><u>Scaffolded Questions:</u></p> <ul style="list-style-type: none"> ● What new information was shared? (<i>Facts about how the dog’s webbed feet make him a good swimmer.</i>) ● When facts are shared, what purpose does the author have? (<i>to inform me</i>) ● What makes this text enjoyable? (<i>The action scene between the dog and the squirrel.</i>) ● When an author makes the text enjoyable, what purpose does he/she have? (<i>To entertain</i>) ● When an author shares facts in an enjoyable way, what two purposes does the author have for writing the text? (<i>To inform and entertain</i>) <p>Closing the Loop:</p> <ul style="list-style-type: none"> ● The author’s purpose of “Lewis and Clark and Me” is to inform and entertain. <ul style="list-style-type: none"> ○ Have students repeat that statement. <p>[Finish reading the text]</p>
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		<p>Say: What is the author’s purpose of the entire selection? <i>(To inform and entertain)</i></p> <p>Closing the Loop:</p> <ul style="list-style-type: none"> • The author’s purpose of “Lewis and Clark and Me” is to inform and entertain. <ul style="list-style-type: none"> ○ Have students repeat that statement.
5 minutes	Spiral Review Questions	<p>Sequence of Events</p> <p>[Stop reading after page 57]</p> <ul style="list-style-type: none"> • [Summary] What happened in the story before this scene on the river? <i>(Lewis meets the dog, Seaman, and buys him from a man on a dock. Seaman is going to travel with Lewis as he explores.)</i> <p>[Stop reading at end of text]</p> <ul style="list-style-type: none"> • [Summary] Summarize this section of the text. <i>(The dog is with the crew on a boat in the Ohio River. He suddenly spots hundreds of squirrels swimming across the river. Lewis commands the dog to get the squirrels and bring them back for the crew to eat. The dog is happy to follow the commands.)</i>
After Reading		
10 minutes	Independent Practice	<p>Say: Now you are going to practice determining author’s purpose. (provide CR template) You will write your constructed response on this piece of paper. As you respond, remember, we determine author’s purpose by looking at the evidence and deciding why the author would have included it. [provide response time and circulate to provide feedback]</p> <p>What author’s purpose is supported by page 61? Use text evidence to support your answer. <i>(The information on page 61 shares how the rowers cheer on the dog as he collects squirrels. The dog is happy to do the work and is happy about the reaction he gets from Lewis. This information is shared to make readers feel good and enjoy the story. When an author shares information to make a story enjoyable, the purpose is to entertain. At the bottom of the page is an actual diary entry from Lewis’s journal. The information he shares is factual about seeing the squirrels and commanding the dog to get them and bring them back to the boat. This tells us that this event really happened. That means the information in the text is about real historical events. When the author shares historical facts and details, the author’s purpose is to inform.)</i></p>
2 minutes	Closing	<p>Say: You did a fantastic job practicing our skill for the day! We will continue working on this tomorrow with a new story.</p> <p>Check for understanding:</p> <ul style="list-style-type: none"> • What skill did we focus on today? <i>(author’s purpose)</i> • What is author’s purpose? <i>(the reason the author wrote the text)</i> • How do we determine author’s purpose? <i>(Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.)</i> • Why do good readers determine the author’s purpose? <i>(Good readers determine author’s purpose to know why the text was written.)</i>

3-5 Constructed Response Writing

Name: _____

Date: _____

Directions: Using the space provided, answer the following question. Support your answer with evidence from the text.

Day 2 Prompt: What author’s purpose is supported by page 61? Use text evidence to support your answer.

<p style="text-align: center;">Restate & Answer</p> <p><i>Restate the prompt and answer the prompt in one sentence</i></p>	
<p style="text-align: center;">Cite</p> <p><i>Give specific text evidence that supports your answer</i></p> <p>Sentence starters:</p> <ul style="list-style-type: none"> • In the text it said, “____.” • The author wrote, “____.” • An example in paragraph ____ is, “____.” • According to the text, “____.” • The text explicitly states, “____.” • In paragraph ____, the author states, “____.” 	
<p style="text-align: center;">Explain</p> <p><i>Explain how your evidence supports your answer</i></p> <p>Sentence starters:</p> <ul style="list-style-type: none"> • This means ____. • This is an example of ____. • This shows that ____. • This is because ____. • This proves ____. • This demonstrates ____. 	

Time Stamps		Day 3 – Below Level Reader
Unit/Week		Unit 1 – Week 2 – Day 3 – “The Long Journey West”
Standard		RI.4.1
Skill Focus		Author’s Purpose and Questioning
I Can Statement		I can determine author’s purpose by analyzing the information in the text to find out the reasons it was written.
Before Reading		
1 minute	Introduce Text	<p>Say: Today, we’re going to read a new expository text about Lewis and Clark called “The Long Journey West” by Joseph Blaire. Expository texts are about real people, places, and events.</p> <p>Read the title with me. (students chorally read title)</p>
4 minutes	Skill Focus Check for Understanding	<p>Say: As we read, we are going to practice the same skill(s) from yesterday.</p> <p>Revisit previous day’s skills [revisit anchor chart]:</p> <ul style="list-style-type: none"> • What skill did we focus on yesterday? (<i>author’s purpose</i>) • What is author’s purpose? (<i>the reason the author wrote the text</i>) • How do we determine author’s purpose? (<i>Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.</i>) • Why do good readers determine the author’s purpose? (<i>Good readers determine author’s purpose to know why the text was written.</i>)
During Reading		
7 minutes	First Read	<p>Say: First, we will read the text silky-smooth by keeping a steady pace and briefly pausing at commas and end marks. Be sure to pay attention to the information that is shared and how it helps us determine author’s purpose.</p> <p>Say: I will start reading, while you follow along. When I say, ‘together,’ we will chorally read as one super-strong voice.</p> <p>Teacher reads pages 3-6. Students join chorally for pages 7-9. Teacher reads 10-13. Students join chorally for 14-15.</p>
3 minutes	Think Aloud and Check for Understanding	<p>Say: Flip back to page 3. On this page, I’ll start by looking at the information the author shares. That will help me figure out the author’s purpose. There’s a date and the name of the president. We learn that this text is about a time when the US was smaller than it is now and that land west of the Mississippi River was owned by Spain and then France. President Jefferson wanted to buy the land for the United States. This is all factual information. When an author includes factual information, the author’s purpose is to inform.</p> <p>Check for understanding after think aloud:</p> <ul style="list-style-type: none"> • What skill did I just use as a good reader? (<i>You determined author’s purpose.</i>) • How did I do that? (<i>You identified the information that the author shared in the text and made inferences about it. You determined that the information was meant to inform.</i>) • What clues did I use to determine author’s purpose? (<i>The information shared about the President, about the size of the US, and about the date.</i>) <p>Closing the Loop</p> <ul style="list-style-type: none"> • I know that the author’s purpose of “The Long Journey West” is to inform. <ul style="list-style-type: none"> ○ Have students repeat that statement.

10 minutes	Second Read Guided Skill- Aligned Comprehension Questions	<p>Say: Now, you are going to independently read the story again.</p> <p>(students sticky note stopping locations [pages 9 and 13] prior to reading)</p> <p>[Stop reading after page 9]</p> <p>Say: What author’s purpose can be determined on page 9? <i>(Information is shared about how Lewis and Clark were able to talk with Native Americans. We learned that Sacagawea helped them communicate, find food, and navigate. This information is made of facts and details. When an author shares facts and details the purpose is to inform.)</i></p> <p>Scaffolded Questions:</p> <ul style="list-style-type: none"> ● What new information was shared? <i>(Facts about how Lewis and Clark communicated and how Sacagawea helped them.)</i> ● When facts are shared, what purpose does the author have? <i>(to inform me)</i> <p>Closing the Loop</p> <ul style="list-style-type: none"> ● I know that the author’s purpose of “The Long Journey West” is to inform. <ul style="list-style-type: none"> ○ Have students repeat that statement. <p>[Stop reading after page 13]</p> <p>Say: What author’s purpose can be determined on page 13? <i>(The information on this page shares details about Fort Clatsop. It tells what Lewis and Clark did at the fort. It gives the date that the explorers began the trip home. These are facts. When an author shares facts, the purpose is to inform. The page also starts with a specific sensory detail. This could be to make the text enjoyable or keep the reader’s attention. When an author includes information to help the reader enjoy the text, the purpose is to entertain.)</i></p> <p>Scaffolded Questions:</p> <ul style="list-style-type: none"> ● What new information was shared? <i>(facts about the Fort, details about the activities at the Fort, the date the explorers left the Fort.)</i> ● When facts are shared, what purpose does the author have? <i>(to inform me)</i> ● What makes this text enjoyable? <i>(The sensory details)</i> ● When an author makes the text enjoyable, what purpose does he/she have? <i>(To entertain)</i> ● When an author shares facts in an enjoyable way, what two purposes does the author have for writing the text? <i>(To inform and entertain)</i> <p>Closing the Loop</p> <ul style="list-style-type: none"> ● I know that the author’s purpose of “The Long Journey West” is to inform and entertain. <ul style="list-style-type: none"> ○ Have students repeat that statement. <p>[Finish reading the text]</p> <p>Say: What is the author’s purpose for this whole text? <i>(The author shares information about the exploration of Lewis and Clark. When an author shares information, the purpose is to inform. The author also includes some sensory details. When an author adds details to make the story enjoyable, the purpose is to entertain. At the end, the author talks about America is great because of Lewis and Clark. This is an opinion. When an author shares an opinion of the topic, the purpose is to persuade.)</i></p> <p>Scaffolded Questions:</p> <ul style="list-style-type: none"> ● When facts are shared, what purpose does the author have? <i>(to inform me)</i>
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		<ul style="list-style-type: none"> When an opinion is shared, what purpose does the author have? (<i>to persuade</i>) When enjoyable details are used, what purpose does the author have? (<i>to entertain</i>) <p>Closing the Loop</p> <ul style="list-style-type: none"> The author's purpose for the text is to inform, entertain, and persuade. <ul style="list-style-type: none"> Have students repeat that statement.
3 minutes	Spiral Review Questions	<p>Sequence of Events</p> <p>[Ask before reading the selection]</p> <ul style="list-style-type: none"> [summary] What did you know about Lewis and Clark before reading this text? (<i>They were explorers. They brought a dog with them. They sailed along the Ohio River.</i>) <p>[Ask after reading the selection]</p> <ul style="list-style-type: none"> [summary] What do you know about Lewis and Clark after reading this text? (<i>They were explorers hired by the President to explore the western part of the country and write about the rivers, mountains, and Native Americans. They worked with 45 other people and made maps, notes, and drawings. They had help communicating with the Native Americans along the way. The journey was difficult but they did finally reach the Pacific Ocean.</i>)
After Reading		
10 minutes	Independent Practice	<p>Say: Now you are going to practice determining author's purpose. (provide CR template) You will write your constructed response on this piece of paper. As you respond, remember, think about the information that's included and ask yourself why the author would tell you that. [provide response time and circulate to provide feedback]</p> <p>What author's purpose can be determined on page 15 of the text? Support your answer with text evidence. (<i>The information shared is letting the reader know that President Jefferson achieved his goal. That's a fact. Facts means the author's purpose is to explain. The author also shares that the United States is better today because of people like Lewis and Clark. That's an opinion. When an author shares an opinion, the purpose of the text is to persuade.</i>)</p>
2 minutes	Closing	<p>Say: Wow! You did awesome practicing our skill again! We will continue working on this tomorrow with a new text.</p> <p>Check for understanding:</p> <ul style="list-style-type: none"> What skill did we focus on today? (<i>author's purpose</i>) What is author's purpose? (<i>the reason the author wrote the text</i>) How do we determine author's purpose? (<i>Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.</i>) Why do good readers determine the author's purpose? (<i>Good readers determine author's purpose to know why the text was written.</i>)

3-5 Constructed Response Writing

Name: _____

Date: _____

Directions: Using the space provided, answer the following question. Support your answer with evidence from the text.

Day 3 Prompt: What author's purpose can be determined on page 15 of the text? Support your answer with text evidence.

<p style="text-align: center;">Restate & Answer</p> <p style="text-align: center;"><i>Restate the prompt and answer the prompt in one sentence</i></p>	
<p style="text-align: center;">Cite</p> <p style="text-align: center;"><i>Give specific text evidence that supports your answer</i></p> <p>Sentence starters:</p> <ul style="list-style-type: none"> • In the text it said, "____." • The author wrote, "____." • An example in paragraph ____ is, "____." • According to the text, "____." • The text explicitly states, "____." • In paragraph ____, the author states, "____." 	
<p style="text-align: center;">Explain</p> <p style="text-align: center;"><i>Explain how your evidence supports your answer</i></p> <p>Sentence starters:</p> <ul style="list-style-type: none"> • This means ____. • This is an example of ____. • This shows that ____. • This is because ____. • This proves ____. • This demonstrates ____. 	

Time Stamps		Day 4– Sleuth
Unit/Week		Unit 1 – Week 2 – Day 4 – “Alano Español: A Dying Breed”
Standard		RI.4.1
Skill Focus		Author’s Purpose
I Can Statement		I can determine author’s purpose by analyzing the information in the text to find out the reasons it was written.
Before Reading		
1 minute	Introduce Text	<p>Say: Today, we’re going to read a short text from our Sleuth book titled “Alano Español: A Dying Breed”. Some weeks we will read a new story from this book. This book is going to help us becoming text detectives as we learn to dig deeper!</p> <p>Read the title with me. (students chorally read title)</p>
4 minutes	Skill Focus Check for Understanding	<p>[Refer to anchor chart]</p> <p>Say: As we read, we are going to practice the same skill from yesterday.</p> <p>Revisit previous day’s skills [revisit anchor chart]:</p> <ul style="list-style-type: none"> • What skill did we focus on yesterday? (<i>author’s purpose</i>) • What is author’s purpose? (<i>the reason the author wrote the text</i>) • How do we determine author’s purpose? (<i>Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.</i>) • Why do good readers determine the author’s purpose? (<i>Good readers determine author’s purpose to know why the text was written.</i>)
During Reading		
10 minutes	First Read	<p>Say: Now we are going to read a short text titled, “Alano Español: A Dying Breed”. I’m going to be looking for readers who follow along with their tracking finger as I read. Remember to pay attention to the order in which events happen in the story.</p> <p>Teacher reads sleuth selection out loud.</p>
10 minutes	Second Read Guided Skill-Aligned Comprehension Questions	<p>Say: Now, let’s read it again together chorally. (read Sleuth)</p> <p>Say: Next, read it again with a partner. You will take turns reading each paragraph. Be sure to follow along as your partner reads because when he/she finishes his/her paragraph, you will have to retell it back in your own words. (read Sleuth)</p> <p>Say: What is the author’s purpose in the first paragraph? (<i>The author shares information about the history of the Alans in Europe and Spain. This information is factual. When an author shares factual details, the purpose is to inform.</i>)</p> <p>Scaffolded Questions:</p> <ul style="list-style-type: none"> • What new information was shared? (<i>Facts about the history of the Alan people.</i>) • When facts are shared, what purpose does the author have? (<i>to inform me</i>) <p>Closing the Loop</p> <ul style="list-style-type: none"> • The author’s purpose in the first paragraph is to inform. <ul style="list-style-type: none"> ○ Have students repeat that statement

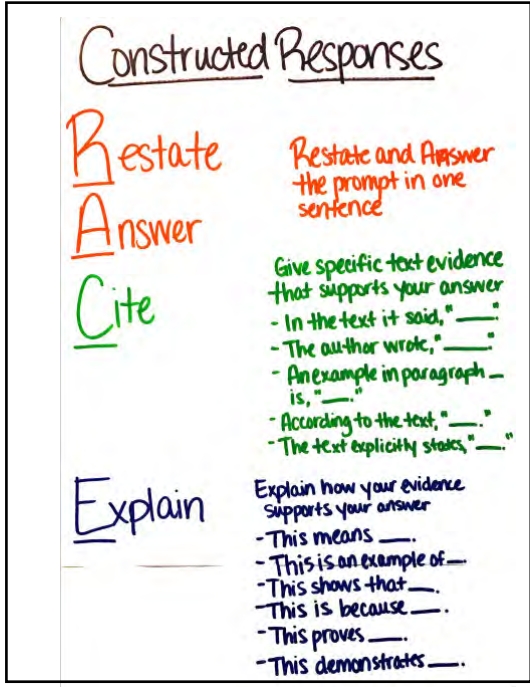
		<p>Say: What is the author’s purpose in the second paragraph? <i>(The author shares information about the dog breed. The description includes factual details. When factual details are shared, the author’s purpose is to inform.)</i></p> <p>Scaffolded Questions:</p> <ul style="list-style-type: none"> • What new information was shared? <i>(The meaning of the name Alano Español, what the dogs look like, and how they act.)</i> • When facts are shared, what purpose does the author have? <i>(to inform me)</i> <p>Closing the Loop</p> <ul style="list-style-type: none"> • The author’s purpose in the second paragraph is to inform. <ul style="list-style-type: none"> ○ Have students repeat that statement <p>Say: What is the author’s purpose for this whole text? <i>(The author shares information about the dog breed and history. The description includes factual details. When factual details are shared, the author’s purpose is to inform. The author also includes only positive information about the dog and suggests that breeders have brought it to the United States. When an author shares only one side of the topic, the purpose is to persuade.)</i></p> <p>Scaffolded Questions:</p> <ul style="list-style-type: none"> • What new information was shared? <i>(The history of the breed, the meaning of the name Alano Español, what the dogs look like, how they act, how they’ve started to disappear, how breeders are trying to save them.)</i> • When facts are shared, what purpose does the author have? <i>(to inform me)</i> • When only positive information is shared (or just one side of a topic) what purpose does the author have? <i>(to persuade)</i> <p>Closing the Loop</p> <ul style="list-style-type: none"> • The author’s purpose for the text is to inform and persuade. <ul style="list-style-type: none"> ○ Have students repeat that statement.
After Reading		
10 minutes	Independent Practice	<p>Say: Now you are going to practice determining author’s purpose. (provide CR template) You will write your constructed response on this piece of paper. As you respond, remember, think about the information that’s included and ask yourself why the author would tell you that. [provide response time and circulate to provide feedback]</p> <p>What information is shared to help you determine the author’s purpose in this text? What is the author’s purpose for writing this text? <i>(The author shares a lot of information about the dogs and their traits. This information is factual. When factual details are shared, the author’s purpose is to inform. The information shared about the dog breed is positive. It tells about the good traits of the dog. A reader who is looking for a rare dog might be convinced to get this kind of a dog. When the information in a text can convince the reader of something, the author’s purpose is to persuade.)</i></p>

2 minutes	Closing	<p>Say: Well done! You've worked so hard to practice our skill for the week. Give yourself a pat on the back!</p> <p>Check for understanding:</p> <ul style="list-style-type: none"> ● What skill did we focus on today? (<i>author's purpose</i>) ● What is author's purpose? (<i>the reason the author wrote the text</i>) ● How do we determine author's purpose? (<i>Identify the information in the text that is being shared by the author. Decide if that information is meant to persuade, information, entertain, or express feelings or ideas.</i>) ● Why do good readers determine the author's purpose? (<i>Good readers determine author's purpose to know why the text was written.</i>)
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Best Practices for 3-5 Constructed Response Writing

Teaching, facilitating, & practicing

Constructed Responses are written responses to Reading Literature & Reading Informational text. Students will read text and respond to a prompt. Constructed responses are valuable and should be a regular practice because they support student comprehension and critical thinking about text.

Pacing Guide	Best Practice	
Between weeks 1-2 of school	<p>Build an anchor chart with your class that reflects the process they will take to complete a constructed response. The anchor chart teaches the process and will aid in the successful completion of daily constructed responses.</p> <p>SAMPLE:</p> 	<p>Tips:</p> <ul style="list-style-type: none"> • Make the anchor chart with the class • Complete one letter of RACE on anchor chart each day • Add sentence starters to the anchor chart
Between weeks 2-4	<p>Model Teacher models writing constructed responses using the RACE method with each day's prompt. The modeling assists students in understanding the process & expectations for successful CR completion.</p>	<p>Tips:</p> <ul style="list-style-type: none"> • Teacher thinks aloud while modeling • Teacher writes response using RACE anchor chart & CR handout • Students copy response on CR handout • Students score one CR based on 2-point rubric
Between weeks 4-7	<p>Shared Writing Teacher facilitates a shared write of constructed responses using the RACE method with each day's prompt. Shared writing allows the teacher to guide student in successfully meeting expectations.</p>	<p>Tips:</p> <ul style="list-style-type: none"> • Teacher guides students through RACE method • Teacher references RACE anchor chart for sentence starters • Teacher writes response on CR template for students to copy (everyone has same response) • Students score one CR based on 2-point rubric
Between weeks 7-10+	<p>Independent Writing Students independently write constructed responses.</p>	<p>Tips:</p> <ul style="list-style-type: none"> • Teacher reads CR prompt to class • Teacher reminds students of expectations • Students write on CR handout • Students write using RACE method • Students score one CR based on 2-point rubric • Teacher circulates to provide feedback

Scoring:

Constructed Response Rubric	
Score	Response Features
2 Points	<ul style="list-style-type: none"> • Valid inferences and/or claims from the text where required by the prompt • Evidence of analysis of the text where required by the prompt • Reasoning and analysis of evidence chosen to support the prompt • Relevant facts, definitions, concrete details, and/or other information from the text to develop response according to the requirements of the prompt • Sufficient number of facts, definitions, concrete details, and/or other information from the text a required by the prompt • Grammatical errors do not impact readability
1 Point	<ul style="list-style-type: none"> • A mostly literal recounting of events or details from the text as required by the prompt • Some relevant facts, definitions, concrete details, and/or other information from the text to develop response according to the requirements of the prompt • Grammatical errors begin to impact readability or written in bullets
0 Point	<ul style="list-style-type: none"> • A response that does not address any of the requirements of the prompt or is totally inaccurate • A response that is not written in English • A response that is unintelligible or indecipherable

Time Stamps		Day 1 – Skill Lesson
Unit/Selection		Unit 3- “The Two Brothers”
Standard		RL.7.2 RL.7.3
Skill Focus		Analyze Influence of Setting on Theme
I Can Statement		I can analyze the influence that the setting of a narrative has on the theme of the narrative.
Before Reading		
5 min.	Skill Focus Introduction & Check for Understanding	<p>[Build an anchor chart while students fill our personal poster]</p> <p>Say: (What) We will analyze the influence that the setting of a narrative has on the theme of the narrative. The theme is the message the author wants the reader to understand about life. The setting is where and when the story takes place.</p> <p>Say: (How) To analyze the influence that the setting has on the theme we:</p> <ol style="list-style-type: none"> 1. Look for details about the time and place of the narrative 2. Look for clues about the way the setting affects the thoughts and actions of the characters 3. Ask, “What message about life does the author want us to understand?” and “How did the setting influence that message?” <p>Say: (Why) Good readers analyze how the setting influences the theme in order to better understand the author’s message about life.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill are we working on this week? (<i>analyzing the influence that the setting of a narrative has on the theme of the narrative</i>) • What is theme? (<i>the message the author wants the reader to understand about life</i>) • What is setting? (<i>where and when the story takes place</i>) • How will we analyze the influence that the setting has on the theme? (<i>First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, “What message about life does the author want us to understand?” and “How did the setting influence that message?”</i>) • Why do we do this as good readers? (<i>Good readers analyze how the setting influences the theme in order to better understand the author’s message about life.</i>)
5 min.	Skill Focus Terminology	<p>[add to anchor chart] Say: Everyone likes a story with a good plot, but there is more to a story than what happens to the characters. Often there is a deeper meaning, or theme. A theme is a message about life or human nature that a writer wants you to understand. A story usually has at least one theme. However, a story may have more than one theme. Some popular themes, such</p>

		<p>as those about loyalty and friendship, appear in many different stories. They are called recurring themes.</p> <p>Say: It's easy to confuse a story's theme with its topic. Here's a way to tell the difference: A topic can be summed up in a word or two, such as "taking risks." A theme, however, is a writer's message about a topic. It usually takes at least one complete sentence to express a theme—for example, "Life's biggest rewards come from taking risks." Stories can mean different things to different people. Two people reading a story might describe its theme differently or find different themes.</p> <p>Say: Point out that literature often deals with complex topics such as love and death. Topics like these can support many themes. Two authors might write about the same topic but express completely different ideas about it.</p> <p>Say: Sometimes the theme of a story is stated directly by the narrator or a character. Most often, though, a theme is implied—hinted at but not stated directly. In such a case, you need to infer the theme by finding clues in the text.</p> <p>Say: This week, we will focus on one clue. We will analyze the setting to determine the theme.</p>
9 min.	Teacher Modeling, Think Aloud, & Check for Understanding	<p>Say: Watch and listen as I read some text and show you how to find the theme. [Direct students to Holt p. 317.] This excerpt is from a fable called "The Lion and the Mouse."</p> <p>[after reading lines 1-14] Say: In order to find the theme of this excerpt, I first need to look for details about the time and place of the narrative. There are no concrete details about the place and time of this narrative, but I can infer that the place is maybe in Africa or in grasslands where a lion might live. Because there is a trap, I know the setting is a place where lions are hunted. There are also no concrete clues about time, but I can infer that the story takes place in the present or past.</p> <p>Say: Next, I need to look for clues about the way the setting affects the thoughts and actions of the characters. At the beginning of the fable, the lion is not in danger. He feels safe and in control, so he lets the mouse go when he could have easily eaten him. At the end of the fable, the setting is not safe for the lion. He is stuck in a trap and not in control at all. He is angry and roaring because he is not in control and cannot escape. The roars draw the attention of the mouse who helps the lion escape.</p> <p>Say: Then, I need to ask, "What message about life does the author want us to understand?" I believe the author is telling us that people should treat others in the same way that they want to be treated. Also, people never really know in advance who may prove to be a great friend.</p> <p>Say: Finally, I need to ask: "How did the setting influence that message?" The setting in the fable determined the level of power and thus the character's actions. At the beginning, in a safe setting, the lion had all the power over the</p>

		<p>little mouse because of his size. At the end, in an unsafe setting, the lion had no power despite his large size. The mouse had the ability to help because he was small and could chew through the ropes.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skills did I just use as a good reader? (<i>You analyzed setting to determine the theme.</i>) • How did I do that? (<i>You looked for details about the time and place of the narrative. Then you looked for clues about the way the setting affects the thoughts and actions of the characters. Finally, you asked, “What message about life does the author want us to understand?” and “How did the setting influence that message?”</i>)
1 min.	Introduce Text	<p>[Direct students to Holt p. 319]</p> <p>Say: Next, let’s read a short story called “The Two Brothers” by Leo Tolstoy on p. 319. In this story, two brothers respond to a challenge by making very different choices. As you read, use the clues in the story to help you understand what the writer is saying about their choices.</p>
0 min.	Background Knowledge	All necessary background knowledge is provided in the text.
0 min.	Explicit Selection Vocabulary Instruction (when appropriate)	n/a
During Reading		
14 min.	Guided Skill-Aligned Comprehension Questions & Check for Understanding	<p>[after reading lines 1-10] What details do we have about the time and place of the narrative so far? (<i>The story takes place in a forest with a river, bears, mountains, and a house. There are no specific details about time so far, but it could take place in the present or past.</i>)</p> <p>[after reading lines 11-39] What does the setting represent to the older brother? (<i>danger, risk, challenge</i>)</p> <p>What does the older brother’s reaction to the setting’s challenges tell you about him? (<i>The elder brother responds to the challenges by focusing on the dangers and refusing to go ahead. His reaction shows that he is practical, cautious, and fearful. He tends to focus on the negative rather than the positive.</i>)</p> <p>How are the brothers’ attitudes different regarding the setting and it’s challenges? (<i>The elder brother’s outlook on life could be summarized as “If it seems too good to be true, it’s probably not true.” He does not believe in magical solutions to the problems of life. The younger brother’s outlook is more adventurous. He believes that amazing things can happen if a person has faith and is willing to take risks.</i>)</p> <p>[after reading lines 40-66] The brothers mention some possible themes in their conversation deciding what to do. What possible themes do they mention? (<i>“In seeking great happiness small pleasures may be lost.” “A bird in the hand is worth two in the bush.” “He who is afraid of the leaves must not go into the forest.” “Beneath a stone no water flows.”</i>)</p>

		<p>How does each brother feel about the choice he made? Explain whether the brothers' attitudes have changed. <i>(Each brother is happy with the choice he made. Neither brother has experienced a change in attitude.)</i></p> <p>What message about life does the author want us to understand? <i>(The writer is probably saying that people make choices based on what they are comfortable with, and as long as they are happy, all is well. Example themes could be: "Different strokes for different folks", "There are no absolutely right or wrong choices in life", "Individuals must decide what is right for them and what makes them happy", "People make choices that suit their personalities.")</i></p> <p>Scaffolded Questions:</p> <ul style="list-style-type: none"> • What might the writer be saying about choices? <i>("There are no absolutely right or wrong choices in life", "Individuals must decide what is right for them and what makes them happy", "People make choices that suit their personalities.")</i> <p>How did the setting influence that message? <i>(The setting of the river, mountain, and bears introduced the element of danger and risk and forced a choice – either they brothers could take risk and face danger and get the rewards or stay safe and not get the rewards. The setting forced a choice, and the message the author wanted to give was about choices.)</i></p> <p>Closing the Loop:</p> <ul style="list-style-type: none"> • In this short story, we analyzed the setting carefully and then thought about the message the author was trying to live and how the setting influenced that theme.
After Reading		
10 min.	Independent Practice – Constructed Response	<p>Say: Now that you've read and comprehended "The Two Brothers," you will answer one question on your own. [distribute Constructed Response template] You will write a constructed response on this paper. As you respond, remember to support your answer with evidence from the text. [Provide response time and circulate to provide feedback.]</p> <p>What is one theme of this story, and how did the setting influence the theme?</p>
1 min.	Closing	<p>Say: You did a fantastic job practicing our skill for the day! We will continue working on this skill for the rest of the week with our text selections.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill are we working on this week? <i>(analyzing the influence that the setting of a narrative has on the theme of the narrative)</i> • What is theme? <i>(the message the author wants the reader to understand about life)</i> • What is setting? <i>(where and when the story takes place)</i> • How will we analyze the influence that the setting has on the theme? <i>(First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, "What message about life does the</i>

		<p><i>author want us to understand?” and “How did the setting influence that message?”)</i></p> <ul style="list-style-type: none">• <i>Why do we do this as good readers? (Good readers analyze how the setting influences the theme in order to better understand the author’s message about life.)</i>
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Time Stamps		Day 2 – Selection 2, Part 1
Unit/Selection		Unit 3- “Amigo Brothers” (p. 324-329)
Standard		RL.7.2 RL.7.3
Skill Focus		Analyze Influence of Setting on Theme
I Can Statement		I can analyze the influence that the setting of a narrative has on the theme of the narrative.
Before Reading		
3 min.	Introduce Text	<p>Say: We face competition all the time, whether we are competing for someone’s attention or for the best grade. And while some competitions are friendly and even fun, others can be brutal. In “Amigo Brothers,” best friends Antonio and Felix find out if their deep friendship can survive an explosive competition.</p> <p>Say: Jot down a list of times when you competed with one or more friends. [1 minute] Now, review your list. Talk to a partner about which experiences helped your friendship and which experiences hurt your friendship. [1 minute]</p>
2 min.	Background Knowledge	<p>Say: Antonio and Felix are Puerto Rican teenagers in New York who share a love of boxing. Their competition for a spot in a tournament threatens their close friendship. They are evenly matched, and both are fiercely determined to win.</p> <p>[Read bottom of sidebar on p. 323 – “Background to the Story”]</p>
6 min.	Explicit Selection Vocabulary Instruction (when appropriate)	<p>Words to Teach:</p> <ul style="list-style-type: none"> • <u>barrage</u>: a rapid, heavy attack • <u>devastating</u>: very effective in causing pain or destruction • <u>pensively</u>: thoughtfully • <u>torrent</u>: violent, rushing stream <p>Say: In today’s text, we have a few words that you may not be familiar with. Let’s learn them together to help us understand the text.</p> <p>The word is barrage. What’s the word? A barrage is a <i>rapid, heavy attack</i>. (Give an example.) What does barrage mean? Turn to a partner and use barrage in a sentence.</p> <p>[repeat for remaining words]</p>
1 min.	Skill Focus Check for Understanding	<p>Say: Let’s review the skill we are working on this week. [Direct student attention to yesterday’s anchor chart.]</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill are we working on this week? (<i>analyzing the influence that the setting of a narrative has on the theme of the narrative</i>)

		<ul style="list-style-type: none"> • What is theme? (<i>the message the author wants the reader to understand about life</i>) • What is setting? (<i>where and when the story takes place</i>) • How will we analyze the influence that the setting has on the theme? (<i>First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, “What message about life does the author want us to understand?” and “How did the setting influence that message?”</i>) • Why do we do this as good readers? (<i>Good readers analyze how the setting influences the theme in order to better understand the author’s message about life.</i>)
During Reading		
1 min.	Set the Purpose for Reading	Say: As we read today, we will practice paying attention to setting. We will analyze the setting and see how it influences the theme, or main message the author is trying to convey.
5 min.	Think Aloud and Check for Understanding	<p>Say: Watch and listen as I demonstrate looking for setting and how it influences theme.</p> <p>[after reading lines 1-34] Say: From this first section of text, I’m already seeing quite a few details about setting. Felix and Antonio grew up on the Lower East Side of Manhattan, which is New York City. They live in the same tenement building, which the book tells me is a rundown apartment building in which mostly poor families live. This helps me understand that the two are best friends that live very close together, and both of them are likely poor. They are both influenced by the big city culture in which they live. However, it is clear they have not been negatively affected by the city atmosphere because the author says that other students have acquired negative habits while Antonio and Felix have remained positive dreamers. They spent a lot of their time at gyms, both the Boys club and the Pro’s Gym, because they both dream of being a boxing champion. There are not any direct details about the time in which this story takes place, but from the clues, I can infer that it is set in the 1970s. Certain period details give clues to the story’s setting. Antonio’s long hair and Felix’s “natural Afro style” both became popular in the late 1960s. The boys’ interest in boxing is in tune with the renewed interest in the sport that began with the career of Muhammad Ali in the 1960s. I can’t determine the theme yet because good readers read the entire text before determining the main message. But, I can predict it might be something about friendship or competition.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skills did I just use as a good reader? (<i>You analyzed setting to later determine the theme.</i>) • How did I do that? (<i>You looked for details about the time and place of the narrative. Then you looked for clues about the way the setting affects the thoughts and actions of the characters.</i>)

14 min.	Guided Skill-Aligned Comprehension Questions	<p>Say: Let's continue reading "Amigo Brothers" together. We will continue to look for details about the setting, thinking about how the setting affects the characters and their actions, and determining the main message or theme of the story.</p> <p>[after reading lines 35-77] What details offer clues to the setting? <i>(The boys live near each other in New York City in the Lower East Side with other immigrants. They live close enough together that they can meet to work out together. They boys are running outside by the East River and stop to have a conversation.)</i></p> <p><u>Scaffolded Questions:</u></p> <ul style="list-style-type: none"> • Where do the boys live? <i>(In New York City, in the same neighborhood in the Lower East Side with other immigrants)</i> • Where do the boys live in proximity with one another? <i>(very close, close enough to meet to work out)</i> • Where are the boys having a conversation in this particular section? <i>(by the East River)</i> <p>How does the setting in this section affect the character's thoughts and actions? <i>(The boys have become close friends because of where they live. The boys are having a conversation in the open air out by the river, not in their gym, which might help them to speak more openly and honestly as friends rather than competitors. Because of their immigrant location and because of their identity as immigrants, they speak with intermittent Spanish words and Spanish slang. Because the boys live so close and are such close friends, they have decided to not see each other until the day of the fight. Antonio will say with his Aunt in the Bronx and train at a different gym.)</i></p> <p><u>Scaffolded Questions:</u></p> <ul style="list-style-type: none"> • How has the boy's close living proximity affected their actions? <i>(The boys have become close friends because of where they live. Because the boys live so close and are such close friends, they have decided to not see each other until the day of the fight. Antonio will say with his Aunt in the Bronx and train at a different gym.)</i> • How does the outdoor setting at the East River affect their thoughts and actions? <i>(The boys are having a conversation in the open air out by the river, not in their gym, which might help them to speak more openly and honestly as friends rather than competitors.)</i> • How does the immigrant neighborhood affect the ways they speak? <i>(Because of their immigrant location and because of their identity as immigrants, they speak with intermittent Spanish words and Spanish slang.)</i> <p>Think back to our lesson on text features. Why might the author have included the visuals on page 327? <i>(to suggest a possibility of what Antonino and Felix might look like; to invite the reader to compare and contrast his or her mental picture of Antonino and Felix with this representation.)</i></p> <p>[after reading lines 78-130] What are the characters' internal conflicts? <i>(They both want to win but not hurt the other. They both work to get excited about the fight in different ways.)</i></p>
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After Reading		
9 min.	Independent Practice: Text Analysis Worksheet	<p>Say: Now that we’ve read through the first half of this story, you will have an opportunity to go back through and review the details about the setting so far and how they affect the character’s thoughts and actions. [distribute Text Analysis Worksheet]</p> <p>Say: Please go back and find clues from characters, setting, and conflict that might help you determine the theme tomorrow when we finish reading the story. Note these details and clues in the chart on your worksheet. [Circulate to check on student work, coach, and provide feedback.]</p>
1 min.	Closing	<p>Say: Wow! You did awesome job practicing our skill today! We will continue working on this tomorrow as we finish reading the rest of the autobiography.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill are we working on this week? <i>(analyzing the influence that the setting of a narrative has on the theme of the narrative)</i> • What is theme? <i>(the message the author wants the reader to understand about life)</i> • What is setting? <i>(where and when the story takes place)</i> • How will we analyze the influence that the setting has on the theme? <i>(First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions)</i>

		<p><i>of the characters. Then ask, “What message about life does the author want us to understand?” and “How did the setting influence that message?”)</i></p> <ul style="list-style-type: none">• <i>Why do we do this as good readers? (Good readers analyze how the setting influences the theme in order to better understand the author’s message about life.)</i>
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Time Stamps		Day 3 – Selection 2, Part 2
Unit/Selection		Unit 3- “Amigo Brothers” (p. 330-334)
Standard		RL.7.2 RL.7.3
Skill Focus		Analyze Influence of Setting on Theme
I Can Statement		I can analyze the influence that the setting of a narrative has on the theme of the narrative.
Before Reading		
1 min.	Review Previous Day’s Text	Say: Yesterday, we read the first half of a story called “Amigo Brothers”. Turn to a partner and summarize what we read yesterday. Be sure to think about the characters, setting, and conflict. [1 minute]
4 min.	Explicit Selection Vocabulary Instruction (when appropriate)	<p>Words to Teach</p> <ul style="list-style-type: none"> • <u>perpetual</u>: continual; unending • <u>unbridled</u>: lacking restraint or control • <u>dispel</u>: to get rid of • <u>bedlam</u>: a noisy confusion • <u>flail</u>: to wave wildly • <u>clarity</u>: clearness of mind <p>Say: In today’s story, we have a few words that you may not be familiar with. Let’s learn them together to help us understand the text.</p> <p>The word is perpetual. What’s the word? Something perpetual is continual or unending. What is a perpetual? (Students chorally say the definition.) Turn to a partner and use perpetual in a sentence.</p> <p>[repeat process for remaining words]</p>
1 min.	Skill Focus Check for Understanding	<p>Say: Today we’re going to finish reading “Amigo Brothers” by Piri Thomas. We will continue to practice looking for details about the setting, thinking about how setting affects the characters’ actions and thoughts, and identifying a theme from the clues we are given about the author’s main message.</p> <p>Revisit Skill [revisit anchor chart]:</p> <ul style="list-style-type: none"> • What skill are we working on this week? (<i>analyzing the influence that the setting of a narrative has on the theme of the narrative</i>) • What is theme? (<i>the message the author wants the reader to understand about life</i>) • What is setting? (<i>where and when the story takes place</i>) • How will we analyze the influence that the setting has on the theme? (<i>First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, “What message about life does the author want us to understand?” and “How did the setting influence that message?”</i>)

		<ul style="list-style-type: none"> Why do we do this as good readers? (<i>Good readers analyze how the setting influences the theme in order to better understand the author's message about life.</i>)
During Reading		
1 min.	Set the Purpose for Reading	Say: Let's continue reading together, looking for setting and how it affects the theme.
25 min.	Guided Skill-Aligned Comprehension Questions	<p>[Read the text using a variety of teacher read aloud, independent reading, or partner reading.]</p> <p>[after reading lines 131-171] In lines 146–153, how has the competition between Felix and Antonio affected other people in the neighborhood? (<i>Many people in the neighborhood are interested in who will win the upcoming fight. Many are placing bets on their favorite fighter. Backers of Felix and Antonio think each has strengths that will allow him to win.</i>)</p> <p>The following quote describes the setting of the neighborhood before the fight. How are Antonio and Felix affected by this setting? <i>“Large posters plastered all over the walls of local shops announced the fight between Antonio Cruz and Felix Vargas as the main bout. The fight had created great interest in the neighborhood.”</i> (<i>They both feel well-liked and respected, but they also feel a lot of pressure to perform well and to win.</i>)</p> <p>What can you infer about Antonio's attitude toward Felix on the day of the fight? (<i>Waving is a friendly gesture, so Antonio probably thinks of Felix as a friend.</i>)</p> <p><u>Scaffolded Question:</u></p> <ul style="list-style-type: none"> Antonio waves at Felix. What can you infer about what he is feeling towards Felix? (<i>Waving is a friendly gesture, so Antonio probably thinks of Felix as a friend.</i>) <p>The setting of the fight moves from the Boys Club to Tompkins Square Park. What is the effect of this change in setting? (<i>The fight will have more spectators and be more publicized. Thus, there is more pressure on the boys.</i>)</p> <p>How has this pressure affected both Felix and Antonio? (<i>Antonio is having doubts about wanting to fight Felix; he is wondering if it will affect their friendship. They are both praying for a quick, easy knockout in the first round so as not to prolong the time they have to fight. They are both thinking of the fight constantly.</i>)</p> <p>[after reading lines 172-234] In lines 192–195, how do you think the boys feel at this moment? How does the setting influence the way the boys feel? (<i>They are probably feeling a bit nervous at finally facing each other in the ring. They are both wondering what the other is thinking. They show their respect by nodding and acknowledging their friendship. The setting puts them as opponents in the ring with people cheering for each one. It shows the match is important and that they need to stay focused.</i>)</p> <p><u>Scaffolded Questions:</u></p>

		<ul style="list-style-type: none"> • Why does the text say, “Antonio tried to be cool”? (<i>He is not feeling cool; he is feeling nervous.</i>) • Why does the text say, “When Antonio turns, he finds Felix looking at him”? (<i>Both boys wonder what the other is thinking.</i>) • Why do the boys nod quickly and then turn away? (<i>They want to show respect to one another. They don’t want to focus on their friendship but on the fight.</i>) <p>How might the noise of the crowd affect the fighters? (<i>It likely makes them more stressed and gives them more pressure, but it might also make them more excited and more determined.</i>)</p> <p>Closing the Loop:</p> <ul style="list-style-type: none"> • At this point, the fight is in full swing. Felix and Antonio both seem to be focused on winning and not thinking too much about their friendship. They seem to be excited by the crowd noise, not stressed. Yet, neither one of them achieved their hope of a clean first round knockout. <p>[after reading lines 235-334] Which line from the text best shows that Felix and Antonio benefit in the fight from knowing each other so well? (<i>“Antonio danced in carefully. He knew Felix had the habit of playing possum when hurt, to sucker an opponent within reach of the powerful bombs he carried in each fist.”</i>)</p> <p>How is the setting affecting the fighters in the thick of the fight? (<i>The support of the frenzied crowd helps the fighters keep going even when they are hurt and tired and probably want to give up.</i>)</p> <p>How does the setting suddenly change in this section? (<i>The crowd is going absolutely wild and crazy, and suddenly they become absolutely silent. They are stunned by the savage fight and the way the boys keep fighting even after the bell rings, signifying the end of the fight.</i>)</p> <p>Why do such good friends keep fighting after the bell rings? (During the intense competition, each boy is focused on his desire to win. They both forget everything else during the match, including their friendship.)</p> <p>We predicted the theme might have something to do with competition or winning. As the competition ends, Felix and Antonio are both described as champions, yet only one is the winner. What is the difference between a champion and a winner? (<i>A champion is someone who performs with skill and determination, who puts forth his or her best effort. The winner is the one the judges decide has done the best job. While there can only be one winner of the fight, both Felix and Antonio have competed like champions because they gave it all they had.</i>)</p> <p>What message about life does the author want us to understand? (<i>Possible answers: Friendship is more important than winning. Friends must work hard to compete and maintain their friendship.</i>)</p>
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		<p>Closing the Loop:</p> <ul style="list-style-type: none"> After all of the tension and buildup and savage boxing, neither boy achieves a knockout of the other. The referees must decide the winner based on the fighting, not by a clear knockout. The boys are so into the fighting that they forget their friendship and the crowd and even the referees and rules of the game, and they continue fighting after the fight is over. Their trainers have to pull them apart. They lunch at each other as if to keep fighting, but they end up embracing, or hugging each other, which is a surprising end to such a brutal fight. They end up walking out of the ring, arm in arm, because they are both champions. They don't even hear the announcer announce the winner chosen by the referees.
After Reading		
10 min.	Independent Practice: Text Analysis Worksheet	<p>[Direct students get out their text analysis worksheet from yesterday.]</p> <p>Say: Now that we've read through the rest of this story, you will have an opportunity to go back through and review the clues about theme from the characters, setting, and conflict. Then, we can determine a theme for the entire story, using the clues.</p> <p>Say: Fill in the chart with more clues that identify the theme of the story and write what you think the theme is based on the clues. Then answer the question that follows. [Circulate to check on student work, coach, and provide feedback.]</p>
2 min.	Closing	<p>Say: Wow! You did awesome job practicing our skill today! We will continue working on this tomorrow.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> What skill are we working on this week? (<i>analyzing the influence that the setting of a narrative has on the theme of the narrative</i>) What is theme? (<i>the message the author wants the reader to understand about life</i>) What is setting? (<i>where and when the story takes place</i>) How will we analyze the influence that the setting has on the theme? (<i>First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, "What message about life does the author want us to understand?" and "How did the setting influence that message?"</i>) Why do we do this as good readers? (<i>Good readers analyze how the setting influences the theme in order to better understand the author's message about life.</i>)

Time Stamps		Day 4 – Close Read
Unit/Selection	Unit 3- “Amigo Brothers”	
Standard	RL.7.2 RL.7.3	
Skill Focus	Analyze Influence of Setting on Theme	
I Can Statement	I can analyze the influence that the setting of a narrative has on the theme of the narrative.	
Before Reading		
2 min.	Skill Focus Check for Understanding	<p>Say: Today, we will continue practicing the skill we’ve been working on this week.</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill are we working on this week? (<i>analyzing the influence that the setting of a narrative has on the theme of the narrative</i>) • What is theme? (<i>the message the author wants the reader to understand about life</i>) • What is setting? (<i>where and when the story takes place</i>) • How will we analyze the influence that the setting has on the theme? (<i>First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, “What message about life does the author want us to understand?” and “How did the setting influence that message?”</i>) • Why do we do this as good readers? (<i>Good readers analyze how the setting influences the theme in order to better understand the author’s message about life.</i>)
During Reading		
1 min.	Close Read – Set Purpose	Say: We’re going to look back at “Amigo Brothers” to review the ways that setting influences theme.
15 min.	Skill-Aligned Question and Discussion	<p>[Direct students to open interactive reader or textbook to “Amigo Brothers.”]</p> <p>Say: Let’s review a few questions about setting and theme.</p> <p>Let’s think first about the topics in this story. What does the title of the story tell you about Felix and Antonio’s friendship? (<i>They were such good friends that they felt like brothers.</i>)</p> <p>How do the boys’ similarities contribute to their friendship? (<i>Because they come from the same background and both enjoy boxing, they have a lot in common. They can spend time together working out and talking about boxing, and each understands what the other goes through.</i>)</p> <p>Why does Antonio try to convince himself that fighting is like any other profession? (<i>He wants to believe that he can set his friendship aside when he’s in the ring with Felix.</i>)</p>

		<p>The people in the neighborhood are intensely interested in the fight between Felix and Antonio. How might this interest affect the two fighters? <i>(The neighborhood interest might put extra pressure on the fighters to do well in the competition and not let their supporters down.)</i></p> <p>Describe how the end of the story reflects the theme. <i>(The end of the story shows that friendship is more important than who won the fight.)</i></p> <p>How does Felix and Antonio’s decision to avoid seeing each other before the fight help them to keep their friendship intact? <i>(The separation allows them to mentally prepare to enter the ring as opponents rather than close friends. At the same time, they make a commitment to come together afterward as if nothing had happened.)</i></p> <p>Say: Now you will work with a partner to determine what you think is the theme of this text and how the setting influenced the theme.</p> <p>[distribute Close Reading worksheet] Say: With your partner, determine what you think is the main theme of the story. Remember, theme is a message about life the author wants you to understand. Then, find three pieces of text evidence that show how the setting of “Amigo Brothers” helped create the theme you chose. [Give students 12-15 minutes to work with a partner on this task. Circulate to provide feedback and coaching.]</p>
After Reading		
30 min.	Independent Practice – Constructed Response	<p>Say: Now that we’ve reviewed some key parts of the text, you will write a constructed response about the theme and setting of “Amigo Brothers.” [Provide response time and circulate to provide feedback.]</p> <p>How is the setting important to the theme of “Amigo Brothers”? Use examples from the story to support your response.</p>
2 min.	Closing	<p>Say: Fantastic work practicing our skill of analyzing how setting influences theme!</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill are we working on this week? <i>(analyzing the influence that the setting of a narrative has on the theme of the narrative)</i> • What is theme? <i>(the message the author wants the reader to understand about life)</i> • What is setting? <i>(where and when the story takes place)</i> • How will we analyze the influence that the setting has on the theme? <i>(First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, “What message about life does the author want us to understand?” and “How did the setting influence that message?”)</i> • Why do we do this as good readers? <i>(Good readers analyze how the setting influences the theme in order to better understand the author’s message about life.)</i>

Time Stamps	Day 5 – Skill Review (Workshop) and Formative Assessment	
Text for Teacher-Led Small Group	“After Twenty Years” (attached)	
Standard	RL.7.2 RL.7.3	
Skill Focus	Analyze Influence of Setting on Theme	
I Can Statement	I can analyze the influence that the setting of a narrative has on the theme of the narrative.	
Introduction		
5 min	Set the Stage	<p>[Display student groups on projector with Do Now.]</p> <p>Say: Remember, today is workshop day! You will rotate to three different centers. Our three workshop groups will be a teacher-led group with me at the table, an assessment/independent reading group at their desks, and an independent work group at their desks. When you walked in, you saw the group you are starting in. Let’s review how to transition between our workshop groups.</p> <p>[Refer to anchor chart.] Say: Remember, my expectations for this transition are:</p> <ol style="list-style-type: none"> 1- Stand up quietly, push in your chair, walk to the table 2- Bring a pencil and your materials 3- Sit at your seat at a level zero <p>If you are not in the group that is transitioning, remain at a level zero in your seat.</p> <p>[Refer to anchor chart.] Remember, when your group is working on the assessment and independent reading, my expectations for you are:</p> <ol style="list-style-type: none"> 1- Reading material is at your desk 2- Work at a level zero 3- Complete assessment and turn it in before beginning reading 4- Stay in your assigned seat <p>Remember, when your group is working on the independent work, my expectations for you are:</p> <ol style="list-style-type: none"> 1- Work at a level zero 2- Wear headphones when on a computer 3- Stay in your seat 4- Complete all assigned tasks <p>Say: Let’s go over what we will complete in our groups today.</p> <ul style="list-style-type: none"> • In the teacher-led group, we will review our comprehension focus skill from last week while reading a new text. Our objective for this time together is “I can analyze the influence that the setting of a narrative has on the theme of the narrative.” • In the assessment group, you will be assessed on your understanding of stages of plot, and then you will read your independent novel. Our objective for this time together is, “I can analyze the influence that the setting of a narrative has on the theme of the narrative.” • In the independent work group, you will have the opportunity to complete a computer-based activity and then answer questions from

		your interactive reader. Your objective for independent time is [insert objective]
Workshop		
Teacher-Led Small Group		
1 min.	Introduce Text	Say: This week, we learned how to analyze the influence that the setting of a narrative has on the theme of the narrative.
0 min.	Background Knowledge	Say: The author of this story, William Sydney Porter (1862-1910), was an American writer better known by his pen name, O. Henry. "After Twenty Years," published in 1908, is one of his better known short stories that shows how complicated friendship can be.
4 min.	Explicit Selection Vocabulary Instruction (when appropriate)	<p>Words to Teach:</p> <ul style="list-style-type: none"> • <u>spectator</u>: someone who looks on or watches (a performance or other public event) • <u>proposition</u>: something (such as a plan or offer) that is presented to a person or group of people to consider • <u>dismal</u>: showing or causing sadness; very bad or poor • <u>simultaneously</u>: happening at the same time <p>Say: In today's texts, we have a few words that you may not be familiar with. Let's learn them together to help us understand the text.</p> <p>The word is spectator. What's the word? A spectator is someone who looks on or watches (a performance or other public event). What is a spectator? Turn to a partner and use spectator in a sentence.</p> <p>[repeat process for remaining words]</p>
1 min.	Skill Focus Check for Understanding	<p>Say: Let's review how to analyze the influence that the setting of a narrative has on the theme of the narrative.</p> <p>This Week's Skill [revisit anchor chart]:</p> <ul style="list-style-type: none"> • What skill are we working on this week? (<i>analyzing the influence that the setting of a narrative has on the theme of the narrative</i>) • What is theme? (<i>the message the author wants the reader to understand about life</i>) • What is setting? (<i>where and when the story takes place</i>) • How will we analyze the influence that the setting has on the theme? (<i>First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, "What message about life does the author want us to understand?" and "How did the setting influence that message?"</i>) • Why do we do this as good readers? (<i>Good readers analyze how the setting influences the theme in order to better understand the author's message about life.</i>)

1 min.	Set the Purpose for Reading	<p>Say: I will start reading while you follow along. As we read, we will practice looking for details about the setting and thinking about how the setting affects the characters' thoughts and actions. Finally, we will determine the theme and think about how the setting affects the theme.</p>
12 min.	Guided Skill-Aligned Comprehension Questions	<p>[Read the text using a variety of teacher read aloud, independent reading, or partner reading.]</p> <p>[after reading paragraph 2] What details can you find about the setting? <i>(It's 10 pm at night, there are "few spectators", so the streets are nearly empty, it's chilly, windy, and rainy, there is little crime in this area and people go to bed early)</i></p> <p>[after reading paragraph 5] How does the setting affect the characters' thoughts and actions? <i>(The policeman is trying doors, to see if they are unlocked and walking through the street, patrolling to ensure everything is safe and under control. The man in the doorway feels the need to explain himself to the policeman since he is waiting in a dark alley at night, which could be perceived as suspicious.)</i></p> <p>[after reading paragraph 17] How does the setting affect the characters' thoughts and actions? <i>(The man in the doorway is waiting for his friend, Jimmy. He and Jimmy grew up together in New York City and then separated. They vowed to meet again in twenty years right at this spot. The waiting man went out West where he made a lot of money, as evidenced by his diamond watch.)</i></p> <p>[after reading paragraph 33] What is the climax of the story? <i>(The reader finds out that Bob is actually a wanted criminal. Bob realizes that the person he thinks is his friend Jimmy is actually a police officer, and he is under arrest.)</i></p> <p>How did the plainclothes officer know that Bob was a wanted criminal? <i>(The first policeman who spoke to Bob was actually Jimmy. Jimmy took a look at Bob and knew he was a criminal. He was Bob's friend, so he didn't want to arrest him himself. He asked a plainclothes police officer to make the arrest.)</i></p> <p>How did the setting contribute to the climax of the story? <i>(It was a dark night, so Bob couldn't clearly see Jimmy the policeman and didn't recognize him. Also because it was dark, Jimmy couldn't clearly see Bob until he lit a match to light his cigar. When he lit the match, he realized that Bob was a wanted criminal and knew he had to turn him in. Similarly, in the darkness, Bob couldn't tell that the plainclothes police officer wasn't his friend until it was too late. The light and darkness play significant roles in the setting of this story.)</i></p> <p>What are some possible themes for this story? <i>(Friendship is complicated; The decision between loyalty and doing what is right is a hard one to make; Justice is more important than loyalty)</i></p> <p>How did the setting contribute to the theme? <i>(The various patterns of light and darkness symbolize the differences between the two friends- one is light</i></p>

		<i>(Jimmy) and the other is a dark criminal (Bob). The setting of a dark, sinister, cold & rainy night also set up the theme that a complicated decision would be made between right and wrong.)</i>
5 min.	Independent Practice	Say: On the back of your story, write what you believe is the main theme of this story. Then, find three pieces of text evidence that show how the setting influenced the theme. [Check student work and coach as they select a theme and text evidence.]
1 min.	Closing	<p>Say: Excellent work practicing our skill today!</p> <p>Check for Understanding:</p> <ul style="list-style-type: none"> • What skill are we working on this week? <i>(analyzing the influence that the setting of a narrative has on the theme of the narrative)</i> • What is theme? <i>(the message the author wants the reader to understand about life)</i> • What is setting? <i>(where and when the story takes place)</i> • How will we analyze the influence that the setting has on the theme? <i>(First, look for details about the time and place of the narrative. Next, look for clues about the way the setting affects the thoughts and actions of the characters. Then ask, "What message about life does the author want us to understand?" and "How did the setting influence that message?")</i> • Why do we do this as good readers? <i>(Good readers analyze how the setting influences the theme in order to better understand the author's message about life.)</i>
Assessment/Independent Reading Station		
25 min.	Comprehension Skill Assessed	<ul style="list-style-type: none"> • Analyze Influence of Setting on Theme
Independent Work Station		
25 min.	Independent Activities	<ul style="list-style-type: none"> • Computer- setting, theme • Teacher-chosen activity
Closing		
10 min.	Self-Reflection	<p>[Have all students return to their seats.]</p> <p>Say: At the end of every workshop, we will self-reflect on our work for the day. Once you receive a reflection sheet, you will rate yourself on your work around the objectives for the day. Then you will provide evidence to support your rating. On the way out of class, you will give me your self-reflection as your ticket out the door.</p>

Name: _____ Class: _____

After Twenty Years

By O. Henry
1905

William Sydney Porter (1862-1910) was an American writer better known by his pen name, O. Henry. "After Twenty Years," published in 1908, is one of his better known short stories that shows how complicated friendship can be.

As you read, take notes on the imagery used in the story.

- [1] The policeman on the beat moved up the avenue impressively. The impressiveness was habitual and not for show, for spectators¹ were few. The time was barely 10 o'clock at night, but chilly gusts of wind with a taste of rain in them had well nigh depeopled the streets.

Trying doors as he went, twirling his club with many intricate and artful movements, turning now and then to cast his watchful eye adown the pacific thoroughfare, the officer, with his stalwart form and slight swagger, made a fine picture of a guardian of the peace. The vicinity was one that kept early hours. Now and then you might see the lights of a cigar store or of an all-night lunch counter; but the majority of the doors belonged to business places that had long since been closed.

When about midway of a certain block the policeman suddenly slowed his walk. In the doorway of a darkened hardware store a man leaned, with an unlighted cigar in his mouth. As the policeman walked up to him the man spoke up quickly.

"It's all right, officer," he said, reassuringly. "I'm just waiting for a friend. It's an appointment made twenty years ago. Sounds a little funny to you, doesn't it? Well, I'll explain if you'd like to make certain it's all straight. About that long ago there used to be a restaurant where this store stands — 'Big Joe' Brady's restaurant."

- [5] "Until five years ago," said the policeman. "It was torn down then."



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1. **Spectator (noun):** someone who looks on or watches (a performance or other public event)

The man in the doorway struck a match and lit his cigar. The light showed a pale, square-jawed face with keen eyes, and a little white scar near his right eyebrow. His scarfpin was a large diamond, oddly set.

"Twenty years ago to-night," said the man, "I dined here at 'Big Joe' Brady's with Jimmy Wells, my best chum, and the finest chap in the world. He and I were raised here in New York, just like two brothers, together. I was eighteen and Jimmy was twenty. The next morning I was to start for the West to make my fortune. You couldn't have dragged Jimmy out of New York; he thought it was the only place on earth. Well, we agreed that night that we would meet here again exactly twenty years from that date and time, no matter what our conditions might be or from what distance we might have to come. We figured that in twenty years each of us ought to have our destiny worked out and our fortunes made, whatever they were going to be."

"It sounds pretty interesting," said the policeman. "Rather a long time between meets, though, it seems to me. Haven't you heard from your friend since you left?"

"Well, yes, for a time we corresponded," said the other. "But after a year or two we lost track of each other. You see, the West is a pretty big proposition,² and I kept hustling around over it pretty lively. But I know Jimmy will meet me here if he's alive, for he always was the truest, staunchest³ old chap in the world. He'll never forget. I came a thousand miles to stand in this door to-night, and it's worth it if my old partner turns up."

[10] The waiting man pulled out a handsome watch, the lids of it set with small diamonds.

"Three minutes to ten," he announced. "It was exactly ten o'clock when we parted here at the restaurant door."

"Did pretty well out West, didn't you?" asked the policeman.

"You bet! I hope Jimmy has done half as well. He was a kind of plodder,⁴ though, good fellow as he was. I've had to compete with some of the sharpest wits going to get my pile. A man gets in a groove in New York. It takes the West to put a razor-edge on him."

The policeman twirled his club and took a step or two.

[15] "I'll be on my way. Hope your friend comes around all right. Going to call time on him sharp?"

"I should say not!" said the other. "I'll give him half an hour at least. If Jimmy is alive on earth he'll be here by that time. So long, officer."

"Good-night, sir," said the policeman, passing on along his beat, trying doors as he went.

2. **Proposition (noun):** something (such as a plan or offer) that is presented to a person or group of people to consider
 3. Perhaps a form of "staunch," meaning of strong construction or conviction.
 4. a person who works in a slow, uninspired manner; a person who plods

There was now a fine, cold drizzle falling, and the wind had risen from its uncertain puffs into a steady blow. The few foot passengers astir in that quarter hurried dismally⁵ and silently along with coat collars turned high and pocketed hands. And in the door of the hardware store the man who had come a thousand miles to fill an appointment, uncertain almost to absurdity, with the friend of his youth, smoked his cigar and waited.

About twenty minutes he waited, and then a tall man in a long overcoat, with collar turned up to his ears, hurried across from the opposite side of the street. He went directly to the waiting man.

[20] "Is that you, Bob?" he asked, doubtfully.

"Is that you, Jimmy Wells?" cried the man in the door.

"Bless my heart!" exclaimed the new arrival, grasping both the other's hands with his own. "It's Bob, sure as fate. I was certain I'd find you here if you were still in existence. Well, well, well! — twenty years is a long time. The old restaurant's gone, Bob; I wish it had lasted, so we could have had another dinner there. How has the West treated you, old man?"

"Bully; it has given me everything I asked it for. You've changed lots, Jimmy. I never thought you were so tall by two or three inches."

"Oh, I grew a bit after I was twenty."

[25] "Doing well in New York, Jimmy?"

"Moderately. I have a position in one of the city departments. Come on, Bob; we'll go around to a place I know of, and have a good long talk about old times."

The two men started up the street, arm in arm. The man from the West, his egotism enlarged by success, was beginning to outline the history of his career. The other, submerged in his overcoat, listened with interest.

At the corner stood a drug store, brilliant with electric lights. When they came into this glare each of them turned simultaneously⁶ to gaze upon the other's face.

The man from the West stopped suddenly and released his arm.

[30] "You're not Jimmy Wells," he snapped. "Twenty years is a long time, but not long enough to change a man's nose from a Roman to a pug."

"It sometimes changes a good man into a bad one," said the tall man. "You've been under arrest for ten minutes, 'Silky' Bob. Chicago thinks you may have dropped over our way and wires us she wants to have a chat with you. Going quietly, are you? That's sensible. Now, before we go on to the station here's a note I was asked to hand you. You may read it here at the window. It's from Patrolman Wells."

5. **Dismal** (*adjective*): showing or causing sadness; very bad or poor

6. **Simultaneously** (*adverb*): happening at the same time

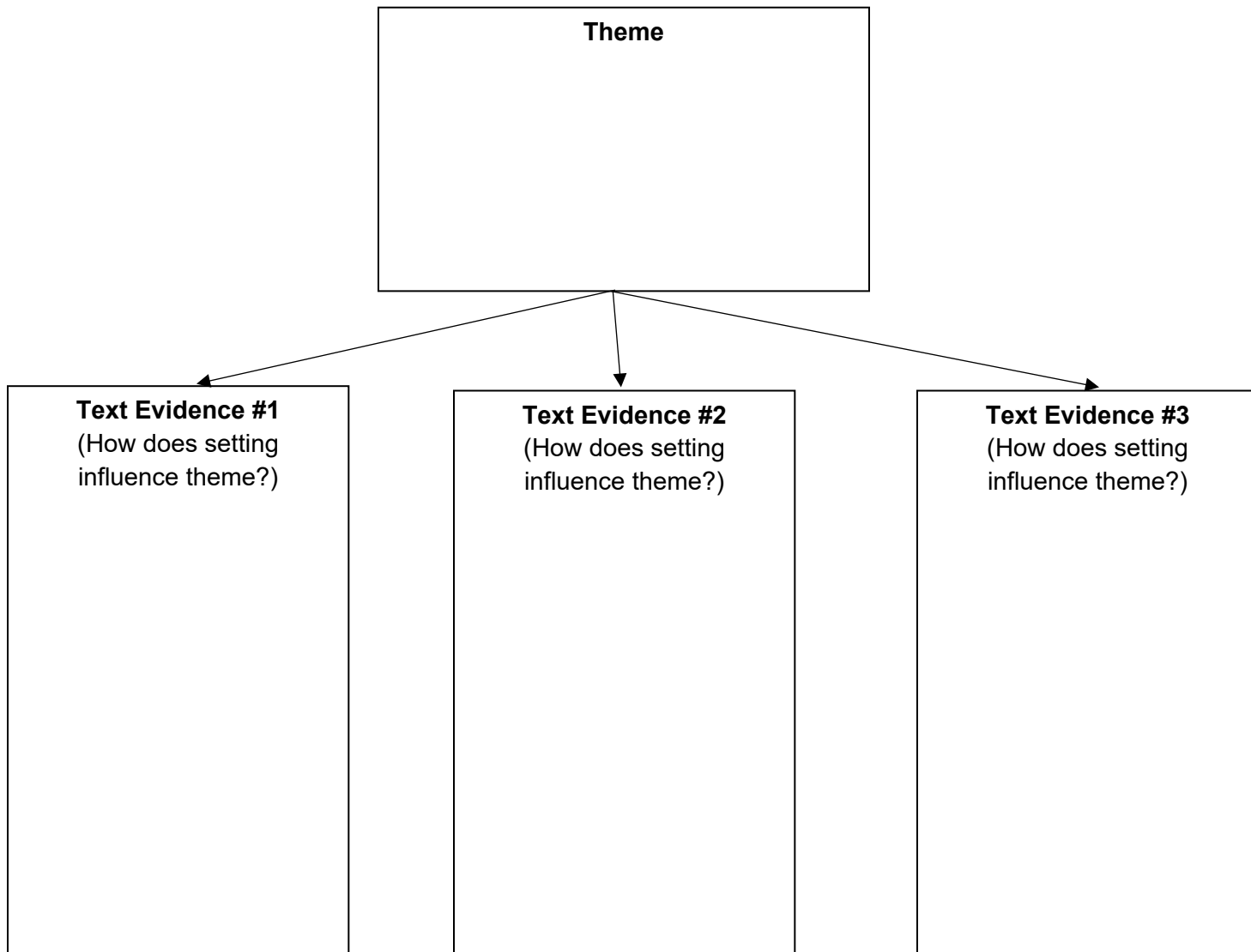


The man from the West unfolded the little piece of paper handed him. His hand was steady when he began to read, but it trembled a little by the time he had finished. The note was rather short.

"Bob: I was at the appointed place on time. When you struck the match to light your cigar I saw it was the face of the man wanted in Chicago. Somehow I couldn't do it myself, so I went around and got a plain clothes man to do the job. JIMMY."

"After Twenty Years" by O. Henry (1905) is in the public domain.

Close Reading- "Amigo Brothers"



Name: _____ Date: _____

Workshop Self-Reflection

Please fill in your comprehension skill objective for the week and rate yourself on how well you understand it on a scale of 1 (I don't understand it at all) to 5 (I completely understand it).

Objectives:

Skill of the Week – I can _____

Rate: 1 2 3 4 5

Evidence to support your rating: _____

What do you need to continue practicing? _____

Name: _____

Date: _____

Workshop Self-Reflection

Please fill in your comprehension skill objective for the week and rate yourself on how well you understand it on a scale of 1 (I don't understand it at all) to 5 (I completely understand it).

Objectives:

Skill of the Week – I can _____

Rate: 1 2 3 4 5

Evidence to support your rating: _____

What do you need to continue practicing? _____

Formative Assessment Data Monitoring

Fill in the table below with student names based on the scores from this week's comprehension quiz. Use this data to organize your three workshop groups for the following Friday.

This week's assessed comprehension skill: _____

3.0 100%	2.5-2.0 75-50%	1.5-0.5 below 25%

Sample Math Lesson Plans

Kindergarten Unit 1 – Introducing Counting					
	Day 1	Day 2	Day 3	Day 4	Day 5
Math Routines 10 minutes	Which One Doesn't Belong	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines
Math Stories 20 minutes	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives
Math Lesson 30 minutes	Lesson 1, Activity 1 TE p. 2 See Math in Real-World Pictures	Lesson 1, Activity 2 TE p. 3-5 Quick Practice Routines	Lesson 2, Activity 1 TE p. 8-9 Counting Mat Activities for Numbers 1-5 (work with Numbers 3 and 4)	Lesson 2, Activity 1 TE p. 8-9 Counting Mat Activities for Numbers 1-5 (work with Numbers 2, 5, and 1)	Lesson 3 TE p. 12-13 Revisit <i>Anno's Counting Book</i> Draw scenes 2 and 3
	Day 6	Day 7	Day 8	Day 9	Day 10
Math Routines 10 minutes	Which One Doesn't Belong	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines
Math Stories 20 minutes	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives	Exploring Manipulatives
Math Lesson 30 minutes	Lesson 4, Activity 1 & 2 TE p. 16-17 Discuss Scenes and Images Counting Mat Activities (work with Numbers 2 and 3) <i>*Activity 3 can be incorporated as a Quick Practice routine option</i>	Lesson 5 TE p. 20-21 Counting Mat Activities (work with Numbers 4 and 5) Draw scenes 4 and 5	Lesson 6, Activity 1 TE p. 24-25 Discussing scenes and creating visual images <i>*Activity 2 student book page can be used as homework or additional practice</i>	Lesson 7, Activity 1 TE p. 30-31 Counting Mat Activities (only include Steps 1-8)	Lesson 9 TE p. 40-43 Counting Mat Activities (only include Steps 1-8 and Compare) (work with Numbers 3 and 5)
	Day 11	Day 12	Day 13	Day 14	Day 15
Math Routines 10 minutes	Which One Doesn't Belong	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines
Math Stories 20 minutes	Grab & Count	Grab & Count	Grab & Count	Grab & Count	Grab & Count
Math Lesson 30 minutes	Lesson 8, Activity 1 TE p. 34 Describe Circles	Lesson 8, Activity 2 TE p. 35 Draw Circles	Lesson 10, Activity 1 TE p. 46-47 Attributes of Rectangles	Lesson 10, Activity 2 TE p. 48-49 Describe Squares	Lesson 10, Activity 3 TE p. 50-53 Classify Shapes

Kindergarten Unit 1 – Introducing Counting					
	Day 16	Day 17	Day 18	Day 19	Day 20
Math Routines 10 minutes	Which One Doesn't Belong	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines
Math Stories 20 minutes	Grab & Count	Grab & Count	Grab & Count	Grab & Count	Grab & Count
Math Lesson 30 minutes	Lesson 11, Act. 1 & 2 TE p. 56-57 Discussing <i>Anno's Counting Book</i> Counting Mat Activities (work with Numbers 6-10) <i>*Activity 3 can be incorporated as a Quick Practice routine option</i>	Lesson 12, Activity 1 TE p. 60 Counting Mat Activities (work with Numbers 6-10)	Lesson 12, Activity 2 TE p. 61-63 Write the Numbers 1, 2, and 3	Lesson 13, Activity 1 TE p. 66 Counting Mat Activities Numbers 1-10	Lesson 13, Activity 2 TE p. 67 Seeing Quantities in Groups
	Day 21	Day 22	Day 23	Day 24	Day 25
Math Routines 10 minutes	Which One Doesn't Belong	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines
Math Stories 20 minutes	Grab & Count	Grab & Count	Grab & Count	Grab & Count	Grab & Count
Math Lesson 30 minutes	Lesson 14, Activity 1 TE p. 70-72 Write, Draw, and Count with the Number 4	Lesson 15, Activity 1 TE p. 78 Counting Mat Activities 1-10	Lesson 15, Activity 2 TE p. 79 See Different Sized Groups	Lesson 16, Act. 1 & 2 TE p. 82-84 Writing the Number 5 & Extra Practice	Lesson 17, Activity 1 TE p. 88 Counting Mat Activities (Numbers 6-10)
	Day 26	Day 27	Day 28	Day 29	Day 30
Math Routines 10 minutes	Which One Doesn't Belong	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines	Math Expressions Daily Routines
Math Stories 20 minutes	Grab & Count	Grab & Count	Grab & Count	Unit Assessment	Unit Assessment
Math Lesson 30 minutes	Lesson 17, Activity 2 TE p. 88-89 Learn to Make Dot-to-Dot Pictures	Lesson 18, Activity 1 TE p. 92-93 Math and the Museum	Lesson 18, Act. 2 & 3 TE p. 94-95 Make a Model/Use Reasoning & Establish a Position		

Math Background – Unit 1																											
Standard	Standard for Mathematical Practice 5: Use appropriately tools strategically.																										
Days 1 – 10																											
Problem Type	Exploring Manipulatives																										
Math Background	<p>The focus during the first two weeks of this unit is to introduce students to math manipulatives they will be using for more structured math activities throughout the year. When encountering new manipulatives, students need time to explore and play in order to construct ideas of their features. It is very common to see students dive into these materials without any guidance, and to see mathematical thinking and vocabulary naturally emerge.</p> <p>For example, when exploring connecting cubes, young children will often build towers or trains and discuss measurement concepts such as length or height. Children working with different colored tiles or pattern blocks may create patterns or build geometric shapes. Exploring manipulatives builds the foundation for Mathematical Practice 5 – Use appropriate tools strategically.</p> <p>This exploration time is also a critical time for the classroom teacher to be able to set expectations for manipulatives use, prior to bringing them into a more structured task. It is important to explicitly teach boundaries for manipulatives (e.g., not throwing, keeping them in a specified space) and procedures, such as passing out and cleaning up.</p> <p>Almost anything can be used as a math manipulative. There should be a variety of at least 8-10 different manipulatives readily accessible to students. The following list includes both materials that can be purchased from educational companies or recycled/repurposed from other materials.</p> <table border="1" data-bbox="477 1041 1360 1497"> <tbody> <tr> <td>Two-colored counters</td> <td>Beans</td> </tr> <tr> <td>Buttons</td> <td>Pasta</td> </tr> <tr> <td>Connecting cubes</td> <td>Beads</td> </tr> <tr> <td>1-inch tiles</td> <td>Clothespins</td> </tr> <tr> <td>Pennies</td> <td>Popsicle sticks</td> </tr> <tr> <td>Plastic bears, insects, fruit, etc.</td> <td>Toothpicks</td> </tr> <tr> <td>Plastic links</td> <td>Bottle caps</td> </tr> <tr> <td>Pattern blocks</td> <td>Marshmallows</td> </tr> <tr> <td>Small snack crackers</td> <td>Baby food pouch caps</td> </tr> <tr> <td>Cotton balls</td> <td>Craft pom-poms</td> </tr> <tr> <td>Small hair clips</td> <td>Large paper clips</td> </tr> <tr> <td>Googly eyes</td> <td>Bingo chips</td> </tr> <tr> <td>Nuts and bolts</td> <td>Packing peanuts</td> </tr> </tbody> </table>	Two-colored counters	Beans	Buttons	Pasta	Connecting cubes	Beads	1-inch tiles	Clothespins	Pennies	Popsicle sticks	Plastic bears, insects, fruit, etc.	Toothpicks	Plastic links	Bottle caps	Pattern blocks	Marshmallows	Small snack crackers	Baby food pouch caps	Cotton balls	Craft pom-poms	Small hair clips	Large paper clips	Googly eyes	Bingo chips	Nuts and bolts	Packing peanuts
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I Can Statement(s)	<p>I can use math tools (manipulatives) appropriately.</p> <p>I can explain how I use math tools.</p>																										
Discussion	<p>The discussion of exploring manipulatives is an opportunity for students to gain practice explaining their work and ideas as well as an opportunity for the teacher to establish norms and procedures for what a class math discussion should look and sound like.</p>																										

Exploring Manipulatives Structure

Preparation

1. Determine which manipulatives will be used each day.
Suggestion: Have one bin of manipulatives per small group each day.
2. Determine how manipulatives will be distributed.
Examples:
 - Have bins (with lids) on tables prior to beginning with Exploring Manipulatives.
 - Designate one student from each table to get a bin from a central storage location.
3. Determine how student movement will be structured during exploration.
Examples:
 - One bin of manipulatives at each table/group and students stay at table.
 - Manipulatives set up at stations and students are able to move freely. It may be helpful to provide a limit on how many students may be at a station.

Engage

This portion must be done at least the first day of each week. It can be done daily to open the activity.

 **2-3 minutes**

1

Show either the collection of manipulatives, or a projected image of the manipulatives, the class will be working with (see example below).



Look at these groups of objects [or pictures]. I want you to take 15 seconds to think about what you notice and what you wonder.

2

Use a **Think-Pair-Share** structure (see *Best Practices*) to have students share:



Share with your partner what you notice and wonder about the picture.

3

Use an attention signal to bring students back to the whole group. Have 4-5 students share out. Accept any and all responses, this will validate student thinking.



Best Practices

- It is suggested that students be seated in a carpet area for this part of the routine. This will create an engaging and comfortable setting for students to discuss ideas.
- Preplan a structure for the **Think-Pair-Share** and be very explicit with the directions.
Example: (After giving think time...)



Turn to your partner to share what you noticed. The partner who [has the most letters in their name] will go first. You will have [20 seconds] to share, I will tell you when to switch. Go!

Introducing the Activity

10-12 minutes

1



[On Day 1]

We are going to use lots of different math tools to help solve math problems and play math games. These math tools are called manipulatives. You are going to have some time to explore many different manipulatives over the next two weeks.

[Each day]



When you go back to your table/desks, you are going to spend some time exploring your manipulative for today. I want you to see what you can do with them.

2

[On Day 1]

Set very clear expectations regarding appropriate student behavior for interacting with manipulatives and create an anchor chart that can be referenced the rest of the year.



Remember I told you that these are math tools, which means that they are important and we want to take good care of them. Take 15 seconds and think about what are some things we should remember when we are using our tools for math.

A Think-Pair-Share structure can be used before having students share out .
Note: This portion may take longer on Day 1 than other days during Exploring Manipulatives.

[Each day]



You will have about 5-7 minutes when you get back to your seat to explore the manipulative that is at your table today. As you work, remember our expectations.

[Review the anchor chart created on Day 1]

3

Set a time for 5-7 minutes. Circulate and observe students as they work. Keep questioning open-ended to get a sense of how children naturally try to interact with the manipulative.
Example: What have you found you are able to do with your connecting cubes?

Identify 3-4 students who are working with different manipulatives that you will have share in the discussion.

Discussion **5-7 minutes****1**

Use an attention signal to bring students back to the whole group. Ask the 3-4 pre-determined students to share their manipulative and what they found they were able to do with it.

As each student shares, the teacher should restate his/her reasoning to affirm the student's thought process.

**Best Practices**

- Use the first few discussions to establish norms and procedures for what a class math discussion should look and sound like. Creating an anchor chart with these norms is recommended.
- It ***strongly recommended*** to have students who are sharing bring their manipulatives underneath the document camera. A tray or piece of cardstock can help with transferring objects from student's seat to the document camera.
- It is suggested that students be seated in a carpet area for this part of the routine. This will create an engaging and comfortable setting for students to discuss ideas.
- Ask another student to restate what was shared in his/her own words.
- Have students who used the same manipulative or were able to do something similar with theirs show a thumb up or use the sign language for "same" (see video link below).
<https://www.youtube.com/watch?v= AFjifiTpc>

Key Points **2-3 minutes****1**

The teacher will make a connection from the students reasoning to applicable mathematical ideas.



Examples: ***"I noticed you were able to use the connecting cubes to measure how long your pencil was."*** or ***"I noticed you sorted the pasta pieces by color."***

2

Wrap-up the routine by articulating what students did today and how it connects to mathematics.



Example: ***"Scholars, today you explored manipulatives and found you were able to do a lot of different things with them. Good mathematicians use different tools, like these, to help them solve problems!"***

Math Background – Unit 1	
Standards	<p>K.CC.3 Write numbers from 0 to 20. Represent a number of objects with a written numeral 0-20 (with 0 representing a count of no objects).</p> <p>K.CC.4 Understand the relationship between numbers and quantities; connect counting to cardinality.</p> <ol style="list-style-type: none"> When counting objects, say the number names in the standard order, pairing each object with one and only one number name and each number name with one and only one object. (<i>Ordered sequence of counting, One-to-one principle</i>) Understand that the last number name said tells the number of objects counted. The number of objects is the same regardless of their arrangement or the order in which they were counted. (<i>Cardinal principle</i>)
Days 11 – 28	
Problem Type	Grab & Count
Math Background	<p>Weeks 3-6 introduce a purpose to using the manipulatives by having students engage in a counting activity referred to as Grab & Count. The activity will have some slight variations from week to week:</p> <ul style="list-style-type: none"> Week 3 – Students grab one handful of manipulatives and count. Week 4 – Students grab one handful, count, and record the number of items with a picture or numeral. Weeks 5 and 6 – Students grab two handfuls, count the total when both groups are put together, and record. This builds the foundation for solving problems that involve combining two groups together. <p>Young children’s ability to count objects accurately, flexibly, and with understanding helps to ensure future success in math. Counting is the foundation for understanding our number system, and for much of the work students do with numbers and the operations of addition and subtraction throughout the primary grades. While counting may seem like a simple task, it is quite complex and requires a thorough understanding of the following principles:</p> <ul style="list-style-type: none"> Ordered sequence of counting numbers: Numbers are always assigned to items in a collection in the same order starting with one. One-to-one principle: Exactly one number from the counting sequence is assigned to each item in the collection. Cardinal principle: The last number in the counting sequence assigned to the collection represents the number of objects in the collection. <p>The counting principles do not emerge or solidify in a set sequence. Some children may master the counting sequence prior to mastering the one-to-one principle, and vice versa. Having a variety of experiences with counting will help children in developing their understanding of quantity. As students are working on counting activities in this unit and continue with operations throughout the year, teacher observation and ongoing informal assessment are essential.</p>
I Can Statement(s)	<p>I can use math tools (manipulatives) appropriately.</p> <p>I can count objects and tell how many I counted.</p> <p>I can represent how many objects I counted with a picture or number.</p>
Discussion	<p>At this point the discussion is still an opportunity for students to gain practice explaining their work and ideas as well as an opportunity for the teacher to establish norms and procedures for what a class math discussion should look and sound like.</p>

	<p>Highlight students that use organization strategies, such as lining up objects or moving manipulatives to a separate group as they are counted, during the discussion.</p> <p>When students begin recording representations of the objects they have counted, ask questions to help students attach meaning to their picture or numbers. For example, “What do each of these [circles] represent?” if a student were to draw a circle for each connecting cube. Drawing attention to this connection between the concrete manipulative and pictorial representation will help students as they begin working with contextual problems later in the year.</p>
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Grab & Count Structure

Preparation

1. Determine which manipulatives will be used each day.
Suggestion: Have one bin of manipulatives per small group each day.
2. Determine how manipulatives will be distributed.
Examples:
 - Have bins (with lids) on tables prior to beginning Grab & Count.
 - Designate one student from each table to get a bin from a central storage location.
3. Determine how students will record/draw their set.
Examples:
 - Counting Recording Page (provided as a blackline master)
 - Notebook

Engage

 2-3 minutes

1

Choose a student to come up and hold his/her hand up for the class to see (*student could hold hand under document camera*). Also show students a different bin of manipulatives each day.



Look at [student's name]'s hand and the [manipulatives]. I want you to take 15 seconds to think about what you notice and what you wonder.

2

Use a **Think-Pair-Share** structure (see *Best Practices*) to have students share:



Share with your partner what you notice and wonder about the picture.

3

Use an attention signal to bring students back to the whole group. Have 4-5 students share out. Accept any and all responses, this will validate student thinking.

4

If students did not offer the following wonder “How many [manipulative] can [student] pick up?” suggest the following:



I was wondering how many [manipulative] he/she could pick up in one* handful.

Use a **Think-Pair-Share** structure to have students discuss an estimate of how many the student might pick up in a handful and why. Use an attention signal to bring students back to the whole group. Have 2-3 students share out. Accept any and all responses, this will validate student thinking.

****Note: Beginning in Week 5, students will be picking up two handfuls.***



Best Practices

- It is suggested that students be seated in a carpet area for this part of the routine. This will create an engaging and comfortable setting for students to discuss ideas.
- Preplan a structure for the **Think-Pair-Share** and be very explicit with the directions.

Example: (After giving think time...)



Turn to your partner to share what you noticed. The partner who [has the most letters in their name] will go first. You will have [20 seconds] to share, I will tell you when to switch. Go!

Introducing the Activity

10-12 minutes

1

Have the student pick up one handful (two handfuls during Weeks 5 and 6) of the manipulatives and place in a pile under the document camera. Ask the student to count how many he/she pulled out in the handful.

2

Highlight one strategy the student used to help count accurately.



Example: “I noticed you lined all of the connecting cubes up before you counted them and that helped keep your counting organized.”

Have another student come up to count the manipulatives and highlight any additional strategy the student uses to help organize his/her count.

3

[Beginning Week 4]

On the first day of Week 4, introduce that students will also record how many they grabbed in their handfuls using a drawing and number.

Each day after having students count the manipulatives, ask a student to show under the document camera how they would represent the manipulatives with a drawing and number.

4

Set very clear expectations regarding appropriate student behavior for interacting with manipulatives and completing Grab & Count.



You will have about 3-5 minutes when you get back to your seat to play Grab & Count. You will grab one* handful of your manipulatives and count them. [Beginning Week 4: After you count, draw and record with a number how many you have]. When you finish counting them, put that group back and grab another handful to count. As you work, remember our expectations.

[Review the anchor chart created on Day 1]

***Note: Beginning in Week 5, students will be picking up two handfuls.**

5

Set a timer for 3-5 minutes. Circulate and observe students as they work. Use the Observation Checklist while circulating to get a sense of which counting principles are evident.

Note: It is not necessary to check in with every student each day, rather aim for 1-2 times per week at minimum. Grab & Count is intentionally repetitive in nature so that the teacher can have multiple touchpoints with each student over the course of the four weeks.

Identify 2-3 students to share their counting and/or picture and number representation.



Best Practices

- The size of the manipulative can be varied to differentiate based on students' counting ability. For example, a strong group of counters might be given small beans so they pick up more in their handfuls, while struggling counters might be given larger objects, such as connecting cubes, that they will pick up fewer in a handful.

Discussion

5-7 minutes

1

Use an attention signal to bring students back to the whole group. Ask the 2-3 pre-determined students to share their counting and/or picture and number representation.

As each student shares, the teacher should highlight any strategy that helped organize the student's count. *Examples: Moving each connecting cube as it is counted, standing bears up as they are counted, etc.*



Best Practices

- It **strongly recommended** to have students who are sharing bring their manipulatives and/or recording underneath the document camera. A tray or piece of cardstock can help with transferring objects from student's seat to the document camera.
- It is suggested that students be seated in a carpet area for this part of the routine. This will create an engaging and comfortable setting for students to discuss ideas.
- Ask another student to restate what was shared in his/her own words.

Key Points

2-3 minutes

1


Wrap-up the routine by articulating what students did today and how it connects to mathematics.

Example: "**Scholars, today you used some strategies to help you keep your counting organized. If applicable: You also used pictures and numbers to represent the objects that you counted.**"

THIRD GRADE MATH STORIES



UNIT 2

National
Heritage
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THIRD GRADE UNIT 2

The Relationship Between Multiplication & Division



UNIT PLAN

During Unit 2 students will begin to explore the relationship between multiplication and division. Students will first see division problems as “missing factor” multiplication problems. Only then will the teacher make the connection between the “missing factor” multiplication problem and the concept of division. It is important to read the one-page math background at the beginning of each week in order to understand the WHY behind each week in this unit.

Week 4	Day 1	Day 2	Day 3	Day 4	Day 5
Snap Facts Routine 5 minutes	<i>Practice 1s and 2s</i>	<i>Practice 1s and 2s</i>	<i>Practice 1s and 2s</i>	<i>Practice 1s and 2s</i>	<i>Practice 1s and 2s</i>
Math Story 30 Minutes	Math Story 2.1 Part 1: Fish Part 2: Cookies	Math Story 2.2 Part 1: Flowers Part 2: Crayons	Math Story 2.3 Cupcakes	Math Story 2.4 Marble Game	Math Story 2.5 Pencils
Classroom-Based Instruction 55 Minutes	READY Lesson 21 Solve Problems About Time Pg. 220-221	READY Lesson 21 Solve Problems About Time Pg. 222-223	READY Lesson 21 Solve Problems About Time Pg. 224-225	READY Lesson 21 Solve Problems About Time Pg. 226-227	READY Lesson 21 Solve Problems About Time Pg. 229 Lesson 21 Quiz
Week 5	Day 1	Day 2	Day 3	Day 4	Day 5
Snap Facts Routine 5 minutes	<i>Practice 1s and 2s</i>	<i>Practice 1s and 2s</i>	<i>Practice 1s and 2s</i>	Progress Assessment 1s and 2s	Math Story 2.10 <i>Make 5s Array Cards</i>
Math Story 30 Minutes	Math Story 2.6 The Band	Math Story 2.7 Tomato Plants	Math Story 2.8 Chocolates	Math Story 2.9 Soda	
Classroom-Based Instruction 55 Minutes	READY Lesson 22 Liquid Volume Pg. 230-233	READY Lesson 22 Liquid Volume Pg. 234-237	READY Lesson 23 Mass Pg. 240-243	READY Lesson 23 Mass Pg. 244-247	READY Lesson 23 Mass Pg. 248-249 Lesson 22/23 Quiz

Week 6	Day 1	Day 2	Day 3	Day 4	Day 5
Snap Facts Routine 5 minutes	<i>Practice 5s</i>	<i>Practice 5s</i>	<i>Practice 5s</i>	Strategy Assessment 1s, 2s, 5s	<i>Practice 1s, 2s, 5s together</i>
Math Story 30 Minutes	Math Story 2.11 Road Trip	Math Story 2.12 Fabric	Math Story 2.13 New Year's Eve	Math Story 2.14 Art Project	Math Story 2.15 Ribbon
Classroom-Based Instruction 55 Minutes	READY Lesson 24 Solve Problems Using Scaled Graphs Pg. 250-251	READY Lesson 24 Solve Problems Using Scaled Graphs Pg. 252-255	READY Lesson 25 Draw Scaled Graphs Pg. 260-261	READY Lesson 25 Draw Scaled Graphs Pg. 262-263	READY Lesson 25 Draw Scaled Graphs Pg. 264-265 Lesson 24/25 Quiz
Week 7	Day 1	Day 2	Day 3	Day 4	Day 5
Snap Facts Routine 5 minutes	<i>Practice 1s, 2s, 5s together</i>	<i>Practice 1s, 2s, 5s together</i>	<i>Practice 1s, 2s, 5s together</i>	Progress Assessment 1s, 2s, and 5s	Math Story 2.20 <i>Make 10s Array Cards</i>
Math Story 30 Minutes	Math Story 2.16 How Many Miles?	Math Story 2.17 Mr. Kohlberg's Flower Shop	Math Story 2.18 Straw Shapes	Math Story 2.19 School Play	
Classroom-Based Instruction 55 Minutes	READY Lesson 26 Measure Length and Plot Data on Line Plots Pg. 270-271	READY Lesson 26 Measure Length and Plot Data on Line Plots Pg. 272-273	READY Lesson 26 Measure Length and Plot Data on Line Plots Pg. 274-275	READY Lesson 26 Measure Length and Plot Data on Line Plots Pg. 276-277	READY Lesson 26 Measure Length and Plot Data on Line Plots Pg. 278-279 Lesson 26 Quiz
Week 8	Day 1	Day 2	Day 3	Day 4	Day 5
Snap Facts Routine 5 minutes	<i>Practice 10s</i>	<i>Practice 10s</i>	<i>Practice 10s</i>	Strategy Assessment 1s, 2s, 5s, and 10s	<i>Practice 1s, 2s, 5s, 10s together</i>
Math Story 30 Minutes	Math Story 2.21 Stickers	Math Story 2.22 Cookies	Math Story 2.23 Boxes of Books	Math Story 2.24 Marbles	Math Story 2.25 Erasers
Classroom-Based Instruction 55 Minutes	There are no new READY lessons introduced this week <i>This time can be spent reviewing previously taught lessons/standards in preparation for the upcoming Interim or continuing on with lessons if they took longer throughout the weeks.</i>				



STANDARDS

3.OA.1

Interpret products of whole numbers, e.g., interpret 5×7 as the total number of objects in 5 groups of 7 objects each. *For example, describe a context in which a total number of objects can be expressed as 5×7 .*

3.OA.2

Interpret a fraction as division of the numerator by the denominator ($a/b = a \div b$). Solve word problems involving division of whole numbers leading to answers in the form of fractions or mixed numbers.

3.OA.3

Use multiplication and division within 100 to solve word problems in situations involving equal groups, arrays, and measurement quantities, e.g., by using drawings and equations with a symbol for the unknown number to represent the problem.¹

3.OA.8

Solve two-step word problems using the four operations. Represent these problems using equations with a letter standing for the unknown quantity. Assess the reasonableness of answers using mental computation and estimation strategies including rounding.³



MANIPULATIVES

Students should have access to **connecting cubes** and **counters** throughout Unit 2. They will use these tools to model the situations in the math stories.



Unit 2 Multiplication and Division

Week 4: Grouping & Sharing Division



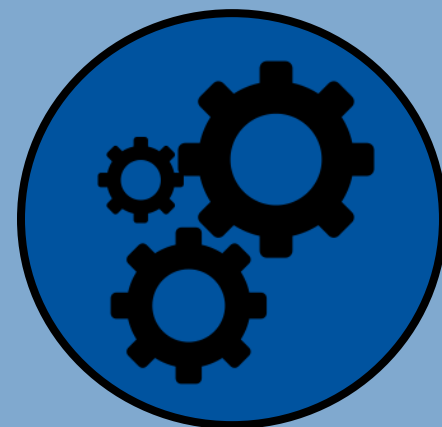
WHAT?

Students model two different types of division situations: Grouping division situations and Sharing (Equal Shares) division situations. Students will make connections between a “missing factor” multiplication equation and a division equation.

3.OA.2 Interpret whole-number quotients of whole numbers, e.g., interpret $56 \div 8$ as the number of objects in each share when 56 objects are partitioned equally into 8 shares, or as a number of shares when 56 objects are partitioned into equal shares of 8 objects each.

WHY?

- Once students understand the meaning of multiplication in terms of finding the total number of items given the number of groups and the number of items in a group, division can be understood by thinking in terms of finding a missing factor (either the number of groups or the number of items in a group).
- Students will begin to develop their understanding of division by solving problems in which collections can be grouped or shared into equivalent groups with no remainders.
- Connecting concrete and pictorial models to both forms of division (Grouping and Sharing), is essential to eliminating the misconception that division is commutative.



HOW?

- Students will first explore the different division situations using manipulatives and drawings.
- Initially, students will then represent their division situation as a “missing factor” multiplication equation.
- Based on their work in Unit 1, students will be able to identify what the different factors in the multiplication equation represents [i.e., the number of groups, the number in each group, the total]
- The teacher will introduce the division equation by making explicit connections to the students’ multiplication equations.



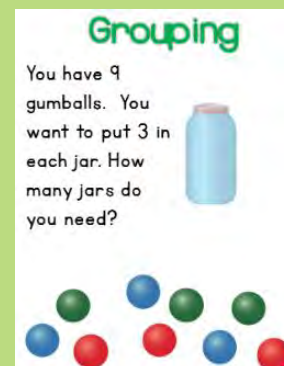
Unit 2 Multiplication and Division

Week 4: Grouping and Sharing Division

STRATEGIES

Grouping Division

1. Students count out the total first and then separate into equal groups by counting until all cubes are gone.
2. Students initially form groups and count one-by-one, group-by-group, until they get the total.



Sharing Division

1. Students count out the total first and then deal out one-by-one into groups until the total is gone, then count how many are in each group
2. Students count out the total and begin by putting a guessed amount in each group to start, add more or take away until groups are equal.



BIG IDEAS

Missing Factor Multiplication

Division can be understood by thinking in terms of finding a missing factor (either the number of groups or the number in each group).

Types of Division

There are two distinct meanings of division (Grouping and Sharing) and students will model the two types of division problems differently.

Relationship Between Multiplication and Division

Students will use their "missing factor" multiplication equations to help them make connections to the division equation.



Math Stories Week at a Glance

Unit 2 Week 4: Grouping and Sharing Division



3.OA.2 Interpret whole-number quotients of whole numbers, e.g., interpret $56 \div 8$ as the number of objects in each share when 56 objects are partitioned equally into 8 shares, or as a number of shares when 56 objects are partitioned into equal shares of 8 objects each.

Vocabulary: *missing factor, division equation, fact family*

I can use concrete materials to model various division problems.

I can identify the information given in the problem as well as the missing information.

I can connect my model to multiplication and division equations.



Big Idea 1: Division can be understood by thinking in terms of finding a missing factor (either the number of groups or the number of items in each group).

Big Idea 2: There are two distinct meanings of division [Grouping and Sharing] and students will model the two types of division problems differently.

Big Idea 3: Students can represent their solution strategies using both a multiplication equation and a division equation and explain what the numbers mean in each.

30 min	Math Story	Key Ideas
Day 1	<p>2.1 Part 1: Fish There are 28 fish, with 7 fish in each fish bowl. How many fish bowls are there?</p> <p>2.1 Part 2: Cookies Mr. Franke baked 28 cookies. He gave all the cookies to 4 friends, being careful to give the same number of cookies to each friend. How many cookies did each friend get?</p>	<ul style="list-style-type: none"> There are two parts to the Math Story today because students will model [manipulatives and/or pictures] and solve these two problems very differently as one is a grouping division problem (fish) and one is a sharing division problem (cookies). It is important for students to be able to see these two problems side-by-side to be able to compare how they solved them. Students will initially use “missing factor” multiplication equations to represent these two types of division problems. Part 1: $\underline{\quad} \times 7 = 28$ Part 2: $4 \times \underline{\quad} = 28$ Students will identify what the factors and product in the multiplication equation represent. <div style="text-align: center;"> <p>Part 1: $\underline{\quad} \times 7 = 28$</p> <p>Number of bowls Number of fish in each bowl Total number of fish</p> <p>Part 2: $4 \times \underline{\quad} = 28$</p> <p>Number of friends Number of cookies given to each friend Total number of cookies</p> </div>

<p>Day 2</p>	<p>2.2 Part 1: Flowers Riley has 32 flowers. She wants to equally share the flowers among 4 of her friends. How many flowers will each friend get?</p> <p>2.2 Part 2: Crayons John has 32 crayons and some boxes. He wants to put 8 crayons in each box. How many boxes will he need?</p>	<ul style="list-style-type: none"> • Students, will again, have two problems to solve on this day in order to see how they model and solve them differently. • Part 1 is a sharing division problem and Part 2 is a grouping division problem. • Students will represent the Flowers problem with a “missing factor” multiplication equation and be able to identify what each factor represents. $4 \times \underline{\quad} = 32$ • Students will also represent the Crayons problem with a “missing factor” multiplication equation and be able to identify what each factor represents. $\underline{\quad} \times 8 = 32$ • Students will compare and contrast the two problems and determine which one was missing the number in each group and which one was missing the number of groups? • Teacher will introduce and make the connection to the division equation. $32 \div 8 = 4$ and $32 \div 4 = 8$ • Teacher will introduce the term fact family and connect it to the multiplication and division equations that were given. • Any multiplication equation has a corresponding division equation. We can use our multiplication facts to help us solve division equations.
<p>Day 3</p>	<p>2.3 Cupcakes Mr. Gomez has 20 cupcakes. He wants to put them in 4 boxes so that each box has the same amount. How many cupcakes can he put in each box?</p>	<ul style="list-style-type: none"> • This is a sharing division problem (note: it is not important that students know which type of division problem this is). • Students may use two different strategy variations when modeling/solving this sharing division problem: <ul style="list-style-type: none"> 1.) Count out the total first and then deal out one-by-one into groups until the total is gone, count how many in each group 2.) Count out the total and begin by putting a guessed amount in each group to start, add more or take away until groups are equal. • Students will represent this problem as a “missing factor” multiplication equation and be able to identify what each factor represents. $4 \times \underline{\quad} = 20$ • Teacher will connect multiplication equation to division equation. $20 \div 4 = 5$ • Multiplication and division are related. • We can use our multiplication facts to solve division problems.

<p>Day 4</p>	<p>2.4 Marble Game Elliott and his friends want to play a game with marbles. There are 18 marbles and each player needs 6 marbles. How many people can play?</p>	<ul style="list-style-type: none"> This is a grouping division problem (note: it is not important that students know which type of division problem this is). Students may use two different strategy variations when modeling/solving this grouping division problem. Students will represent this problem as a “missing factor” multiplication equation and be able to identify what each factor represents. $\underline{\hspace{1cm}} \times 6 = 18$ Teacher will connect to division equation. $18 \div 6 = 3$ Multiplication and division are related. We can use our multiplication facts to solve division problems.
<p>Day 5</p>	<p>2.5 Pencils Bart has 6 boxes of pencils with the same number of pencils in each box. Altogether he has 24 pencils. How many pencils are in each box?</p>	<ul style="list-style-type: none"> This is a sharing division problem (note: it is not important that students know which type of division problem this is). Students may use two different strategy variations when modeling/solving this sharing division problem. Students will represent this problem as a “missing factor” multiplication equation and be able to identify what each factor represents. $6 \times \underline{\hspace{1cm}} = 24$ Teacher will connect to division equation. $24 \div 6 = 4$ Multiplication and division are related. We can use our multiplication facts to solve division problems.

Classroom-Based Instruction Week at a Glance



READY Unit 2 Week 4: Lesson 21

Solve Problems about Time



3.MD.1 Tell and write time to the nearest minute and measure time intervals in minutes. Solve word problems involving addition and subtraction of time intervals in minutes, e.g., by representing the problem on a number line diagram.





Vocabulary: *elapsed time*


Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Independent Practice
		15 Minutes	15 Minutes	30 Minutes
		<i>Engage-Problem-Discussion-I Can</i>	<i>At least 2 aligned problems</i>	Small Group Options
Day 1: I can use clocks and number lines to understand elapsed time.		Lesson Book Pg. 220-221	Lesson Book Pg. 221 #1	Practice & Problem Solving Book: Pages 233-234 i Ready: <i>Time Out!</i> Solve Problems About Time
Day 2: I can use clocks and number lines to understand elapsed time.		Lesson Book Pg. 222-223	Lesson Book Pg. 223 #6, #7	Practice & Problem Solving Book: Pages 235-236 i Ready: <i>Time Out!</i> Solve Problems About Time
Day 3: I can use clocks and a number line to solve a problem to find the start time.		Lesson Book Pg. 224-225	Lesson Book Pg. 225, #11, #12	Practice & Problem Solving Book: Pages 237-238 i Ready: <i>Time Out!</i> Solve Problems About Time
Day 4: I can use clocks, number lines, and equations to solve problems about elapsed time.		Lesson Book Pg. 226-227	Lesson Book Pg. 228	Practice & Problem Solving Book: Pages 239-240 i Ready:

			<i>Time Out!</i> Solve Problems About Time
Day 5: I can use clocks, number lines, and equations to solve problems about elapsed time.	Lesson Book Pg. 229 Review as needed before quiz		<u>Assessment</u> Lesson 21 Weekly Quiz [3.MD.1]

Unit 2 Week 4 Grouping and Sharing Division

Day 1

Snap Facts Routine		 5 Minutes
<p>Practice 1s and 2s</p> <p>See Unit 1, Week 3, Lesson 5 for 'Snap Fact Routine' lesson plan See Appendix for 'Student Directions' page</p>		
Math Story [3.OA.2]		 40 Minutes*
<p><small>*Note: This Math story is longer due to the nature of having a Part 1 and Part 2</small></p>		
<p>Math Story 2.1 Part 1: Fish</p> <p><i>There are 28 fish, with 7 fish in each fish bowl. How many fish bowls are there?</i></p>		
<p>Math Story 2.1 Part 2: Cookies</p> <p><i>Mr. Franke baked 28 cookies. He gave all the cookies to 4 friends, being careful to give the same number of cookies to each friend. How many cookies did each friend get?</i></p>		
Engage [4 min]	<p>A. Show Engage image for MS 2.1 [See myNHA]</p> <p>B. Pose Turn and Talk: <i>What do you notice? What do you wonder?</i> </p> <p>C. Call on multiple students to share. [Option to record responses]</p>	
Problem [12 min]	Visualize the story	<p>A. Ask students to close their eyes or look at the picture from the Engage to visualize what is happening while you tell the Math Story. <i>There are 28 fish, with 7 fish in each fish bowl.</i></p>
	Retell	<p>B. <i>Think-</i> Have students think about what they heard in the story. <i>What did you hear first? What did you hear next?</i> </p> <p><i>Pair- Retell the story to your partner.</i></p> <p><i>Share-</i> Call on one or two students to retell the story, using the questions <i>What did you hear first? What did you hear next?</i></p>

Re-read with question	<p>C. Read the Problem again with the question. <i>There are 28 fish, with 7 fish in each fish bowl. How many fish bowls are there?</i></p>
Make Sense	<p>D. Pose Think, Pair, Share question to allow students to estimate and/or explore reasonable solutions.</p> <p><i>Do you think there will be more than 2 bowls?</i> </p>
Solve	<p>E. Ask students to model the problem using cubes or pictures and document the strategy they use on their recording sheet.</p> <p><i>Now that you have a visual image of what is happening in today's story, I want you to:</i></p> <ol style="list-style-type: none"> <i>1. Think about how you are going to use your cubes to figure out how many fish bowls there are?</i> <i>2. At your desk, use cubes to figure out how many fish bowls there are.</i> <i>3. Try and write a multiplication equation to represent this problem.</i> <i>4. When you have a strategy, talk with your partner and share your strategy that you used to figure out how many fish bowls before we start our discussion.</i>
Circulate & Ask Probing Questions	<p>F. Circulate, listen and observe student thinking. Then ask probing questions and keep students connected to the context of the Math Story.</p> <ol style="list-style-type: none"> <i>a. What do we know in the problem?</i> <i>b. How many cubes are you going to start with? How do you know?</i> <i>c. Is there another way you could solve?</i>

	Choose	<p>G. Identify students who have shown different ways to figure out how many fish bowls there are.</p> <p style="padding-left: 40px;">Example:</p> <ul style="list-style-type: none"> ○ Student who counted out 28 cubes to start and then parceled them out by 7s until there were no more cubes left. ○ Student who did not count out 28 cubes first but started by counting 7 into each group. ○ Student who represented their strategy with a “missing factor” multiplication equation.
<p>Math Story 1.16 Part 2 [10 minutes]</p>	<p>H. Tell students that you are going to give them one more problem to do. Go through the same steps as above:</p> <ul style="list-style-type: none"> ○ Read once without question ○ Have students visualize and retell ○ Read problem again WITH question ○ Have students estimate if they think each friend will get more than 2 cookies? More than 3 cookies? ○ Solve <p style="text-align: center;"><i>Mr. Franke baked 28 cookies. He gave all the cookies to 4 friends, being careful to give the same number of cookies to each friend. How many cookies did each friend get?</i></p>	

Discussion
[6 min]

- A. Chart strategies on an anchor chart based on the order that you want to highlight them, in order to be able to arrive at your Key Points.

Sample Anchor Chart:

The anchor chart is divided into two columns. The left column contains two math problems, both labeled '4 fish bowls'. The first problem is: 'There are 28 fish, with 7 fish in each fish bowl. How many fish bowls are there?' It is solved by drawing four circles representing bowls, each containing 7 small squares representing fish. A label '28 cubes' with arrows points to the fish. The second problem is: 'There are 28 fish, with 7 fish in each fish bowl. How many fish bowls are there?' It is solved by drawing four circles representing bowls, each containing 7 small squares representing fish. The right column contains a math problem: 'Mr. Frankle baked 28 cookies. He gave all the cookies to 4 friends, being careful to give the same number of cookies to each friend. How many cookies did each friend get?' It is solved by drawing four stick figures, each with 7 small circles representing cookies. The label '7 cookies' is written below the figures.



- B. Turn and Talk Question: **What do you notice about these two problems? What did [insert student's name] do differently when solving these two problems?**

Key Points
 [4 min]

I noticed that a lot of us counted out 28 cubes to start in both problems. We used those cubes in different ways to solve these problems.

We had 28 cubes that we wanted to share among fish bowls, and we also had 28 cubes that were cookies that we wanted to share among people.

Let's look at these two problems side by side and take a moment to discuss with our partner one similarity and one difference that you notice. [Call on multiple students to share out]


Possible student responses:

- We used the same numbers in both problems
- We wrote a multiplication equation for both
- One was about fish and fish bowls and one was about cookies and people
- We were missing the 4 in the fish bowl equation, we were missing the 7 in the cookie equation

We wrote two multiplication equations to represent these two problems, the big difference today is that we were missing one of our factors. Let's look at which factor we were missing in each problem.





- In problem #1 we were trying to find out the number of fish bowls. Thinking back to last week, does this factor represent the number of groups or the number in each group? Turn and tell your partner. [Label on anchor chart "Number of groups" under the 4]
- In problem #2 we were trying to find the number of cookies that each friend got. Again, thinking back to last week, does this factor represent the number of groups or the number in each group? Turn and tell your partner. [Label on anchor chart "Number in each group" under the 7]



The anchor chart is divided into two columns. The left column is for the fish problem: "There are 28 fish, with 7 fish in each fish bowl. How many fish bowls are there?" It shows four groups of cubes, each with 7 cubes, labeled 1, 2, 3, and 4. Below this is a multiplication equation: $4 \times 7 = 28$, with a box around the 4 and the label "# of groups" below it. The right column is for the cookie problem: "Mr. Franke baked 28 cookies. He gave all the cookies to 4 friends, being careful to give the same number of cookies to each friend. How many cookies did each friend get?" It shows four stick figures, each with 7 cookies, labeled 1, 2, 3, and 4. Below this is a multiplication equation: $4 \times 7 = 28$, with a box around the 7 and the label "# in each group" below it. A green arrow points from the 4 in the fish equation to the 4 in the cookie equation, and another green arrow points from the 7 in the cookie equation to the 7 in the fish equation.

	<p><i>Boys and girls, today you were able to solve “missing factor” multiplication problems, where one piece of information, or one of our factors was missing.</i></p> <p><i>Today in your Practice Problem and the rest of this week we are going to be working with multiplication problems where one of our factors is missing.</i></p>	
Practice Problem [5 min]	<p>Students will now solve one practice problem on their own.</p> <p>Directions: Solve the problems using cubes or by drawing a picture. Then, write a multiplication equation to represent the problem.</p> <p>1.) <i>Mr. Johnson’s chickens laid 24 eggs. There are 6 eggs in each nest. How many nests are there on Mr. Johnson’s farm?</i></p> <p>2.) <i>Eleanor loves to bake brownies. She baked 24 brownies for her after-school club. There are 6 people in the after-school club and she wants to be sure that everyone gets the same number of brownies. How many brownies will each person get?</i></p>	
 45 min	Classroom-Based Instruction	
15 min	Introduction to New Material	Lesson Book Pg. 220-221
10 min	Guided Practice	Lesson Book Pg. 221 #1
20 min	Independent Practice & Small Group Weekly Options	<p style="text-align: center;">Independent Practice</p> <p style="text-align: center;">Practice and Problem Solving Book Pgs. 233-234</p> <p style="text-align: center;">iReady</p> <p style="text-align: center;">Time Out! Solve Problems About Time</p> <p style="text-align: center;">Teacher Small Group</p> <p style="text-align: center;">Option to pull small groups based on formative assessment. Use READY materials to reteach or extend.</p>

6-8 MATH LESSON CYCLE STRUCTURE OVERVIEW

WHOLE GROUP: [Activity Day: 45 – 60 minutes] [Lesson Day: 30 – 45 minutes]

DO NOW		 8-10 Minutes
<p>The Do Now is part of the Entrance Routine. The Do Now should consist of 1-2 problems that take approximately 5 minutes to complete. Students begin working on this immediately upon entering the classroom and should not need support from the teacher. The teacher should spend between 3-5 minutes reviewing the Do Now so that the lesson can begin within the first ten minutes of class.</p>		
ENGAGE		 5 Minutes
1.	Show the Engage image [see Week at a Glance]. This will allow students to begin thinking about the context of the problem.	
2.	Pose questions to students using a Think-Pair-Share structure:  What do you notice? What do you wonder?	
3.	Have several students share out whole group. Accept any and all responses, even non-mathematical notices and wonderings. This quick activity allows all students to engage in classroom discussion, activates prior knowledge, and allows the teacher to introduce or clarify key vocabulary for the day.	
PROBLEM		 10-15 Minutes
1.	Pose ONE problem to students without telling students HOW to solve. <ul style="list-style-type: none"> • Read the problem without the question and ask students to visualize what is happening. • Facilitate Think-Pair-Share routine to have students retell what they know from the problem. • Read the problem again with the question. Pose a question that allows students to estimate. • Set expectations for problem solving: Allow students to work with partners in pairs and encourage students to use tools, pictures, and equations to prove their strategy. 	
2.	Teacher circulates to observe student strategies and discussion. Teacher asks probing questions and provides scaffolded support as needed. This problem anchors the class discussion and introduces the key concepts for the day. The problem allows all students to work collaboratively to explore a concept and engage in productive struggle and discussion. Students are provided with manipulatives or tools to draw pictures to solve problems. <ul style="list-style-type: none"> • On Day 1 the problem is typically a hand- on activity to build conceptual understanding. • On Day 2- Day 5 the problem is typically a story problem from the text. 	

DISCUSSION & KEY POINTS (I CAN)		 10-15 Minutes
1.	Choose a few students to share their solution strategies based on strategies you have pre-planned to highlight.	
2.	Teacher facilitates as different students are called on to share their thinking with the class. After a few students have shared their strategies for solving the problem, the teacher allows for student processing by asking an additional question. For example: What is similar about these strategies? What is different about these strategies?	
3.	Teacher introduces I CAN statement and models a sample problem/strategy or key concept for the class on the white board or an anchor chart. This anchor chart becomes a tool that students can refer to during guided practice and small group.	
GUIDED PRACTICE		 5-10 Minutes
Teacher has students work in pairs to complete additional practice problems that review the concept introduced with the anchor problem. Teacher will reference the newly created anchor chart and I CAN statement after reviewing each problem. This is quick practice where students work together and then come back to discuss as a class. The teacher can use this as a check for understanding before releasing students to independent practice.		

SMALL GROUP: [Activity Day: 30 – 45 minutes] [Lesson Day: 45 – 60 minutes]

Students should experience at least **two** of the activities each day. Minimal teacher preparation is required for the Independent Practice and Collaborative Practice. This practice will come from Big Ideas or Engage New York. [See Week at a Glance for more guidance.] This will allow teachers to focus their time on preparing for the whole group lesson and the teacher small group lesson. Weeks 1-4 are used to establish strong procedures and expectations for small group instruction. [See Small Group Structure Overview]

ACTIVITY DAY: 2 ROTATIONS @ 10-15 MIN EACH			
	Group 1 (At/Above GL)	Group 2 (Below GL)	Group 3 (At Risk)
Day 1 & 3	Independent Practice	Collaborative Practice	Teacher Group
	Collaborative Practice	Teacher Group	Independent Practice
LESSON DAY: 3 ROTATIONS @ 15-20 MIN EACH			
	Group 1 (At/Above GL)	Group 2 (Below GL)	Group 3 (At Risk)
Day 2 & 4	Collaborative or Independent Practice	Computer	Teacher Group
	Computer	Teacher Group	Collaborative or Independent Practice
	Teacher	Collaborative or Independent Practice	Computer

EXIT TICKET	 5 Minutes
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Classroom-Based Instruction Week at a Glance

Week 1: Classroom Culture & Routines/Procedures



Day	Classroom Culture Focus
1	
2	
3	
4	
5	

Classroom-Based Instruction Week at a Glance

Week 2: Solving Simple Equations & Solving Multi-Step Equations



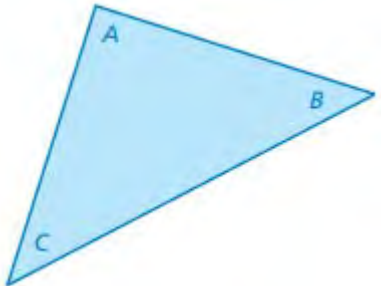
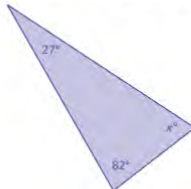
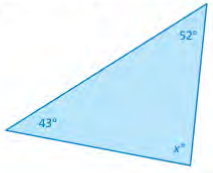


8.EE.7a Give examples of linear equations in one variable with one solution, successively transforming the given equation into simpler forms, until an equivalent equation of the form $x = a$ results .

8.EE.7b Solve linear equations with rational number coefficients, including equations whose solutions require collecting like terms.

Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Small Group Instruction		
		35-45 minutes	10-15 minutes	30-45 minutes		
		Lesson Cycle: Engage – Problem – Discussion – Key Points	At least 2 aligned problems	Independent Practice Problem Sets	Collaborative Problem Sets	Teacher Small Group
Day 1: BI Lesson 1.1 Solving Simple Equations I can solve simple equations using addition, subtraction, multiplication, or division		1.1 [Pg. 2-6] Problem: pg. 3 <i>Activity 3</i> Discussion: Could we have solved this by writing an equation? Key Point: Example 1 & 2	On Your Own pg. 5 #1-9	pg. 7 #7-15, 18-20	Pg. 8 21-27	Pg. 7 1-6
Day 2: BI Lesson 1.1 Solving Simple Equations I can solve simple equations using addition, subtraction, multiplication, or division		1.1 Pg. 6 Problem: Pg. 41 ANTS Discussion: What strategies did you use to solve? What did we learn yesterday that could help? Key Point: Example 3 & 4	Pg. 6 On Your Own #10-12	pg. 7-9 #s 16-17, 28-35	Pg. 8 #36-40, 42, 44	RAP-J 1.1 Practice all
Day 3: BI Lesson 1.2 Solving Multi-Step Equations I can use inverse operations to solve multi-step equations. I can use the Distributive Property to solve multi-step equations.		1.2 [Pg. 10-11] Problem: <i>Activity 1 & 2</i> Discussion: What must you do before you can solve? Are there steps you must follow? Key Point: Example 1 & 2	On Your Own Pg. 12 #1-3	Pg. 14 # 3-9		Pg. 14 #1-2
Day 4: BI Lesson 1.2 Solving Multi-Step Equations I can use inverse operations to solve multi-step equations. I can use the Distributive Property to solve multi-step equations.		1.2 [Pg. 11] Problem: <i>Activity 3</i> Discussion: Is there more than one way to solve? What are your strategies? Key Point: Example 3 & 4	On Your Own Pg. 13 #4-6	pg. 14 #12-17 & Pg. 17 #11-14	Pg. 14 #18 & RAP-J 1.2 Practice all	Teacher choice based on student need
Day 5: I can assess my understanding of writing and solving multi-step equations		White Board Review: Pg. 17 #1-10	8.EE.7a & 8.EE.7b QUIZ			


Introduction to New Material

Week 2: Solving Simple Equations & 1.2: Solving Multi-Step Equations

Day	Engage	Problem	Key Ideas
1	<p>Show:</p>  <p>Ask: What do you notice? What do you wonder?</p>	<p>Bl p. Problem: pg. 3 Activity 3 Work with a partner. Use the rule you wrote in Activity 2 to write an equation for each triangle. Then solve the equation to find the value of x. Use a protractor to check the reasonableness of your answer.</p> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>a.</p>  </div> <div style="text-align: center;"> <p>b.</p>  </div> </div> <div style="display: flex; justify-content: space-around; margin-top: 20px;"> <div style="text-align: center;"> <p>c.</p>  </div> <div style="text-align: center;"> <p>d.</p>  </div> </div> <p>Discussion: How can you use a rule to solve problems in math? Could we have solved this by writing an equation? How?</p>	<p>Bl p. 4 Key Point: Key Idea, Example 1 & 2 Key Ideas:</p> <div style="border: 2px solid black; padding: 10px; margin: 10px 0;"> <p style="text-align: center;">1.1 Solving Simple Equations</p> <p>Equation: two expressions separated by an <u>equal sign</u>. ex: $3x = 12$, $-2x - 1 = 13$</p> <p>* Solution to an equation: What the variable equals after solving the equation. ex: $y = -2$, $x = 7$</p> <p>* Addition Property of Equality: Adding the same # to each side of an equation produces an equivalent (equal) equation. "what you do to one side, you must do to the other." ex: if $5 + 2 = 5 + 2$ then $5 + 2 + 3 = 5 + 2 + 3$ or if $a = b$ then $a + c = b + c$</p> <p>* Subtraction property of Equality: Subtracting the same # from each side of an equation produces an equivalent equation. ex: if $x - 7 = 13$ then $x - 7 - 7 = 13 - 7$</p> <p>* Multiplication & division property of equation: ? create your own definition</p> </div>

2


Show:



Ask:
What do you notice? What do you wonder?

Bl p. 41
Problem: **Problem:** Pg. 41 ANTS

41. **ANTS** Some ant species can carry 50 times their body weight. It takes 32 ants to carry the cherry. About how much does each ant weigh?



Discussion: What strategies did you use to solve this problem. What did we learn yesterday that could help?

Bl p. 6
Key Point: *Example 3 & Example 4*

EX3 Identify solutions

$K + 4 \div 0.2 = 5$ a) -15 b) -5 c) -3 d) 15

$K + 20 = 5 \rightarrow 0.2 \overline{) 4.0}$

$- 20 \quad -20$

$\underline{\hspace{1cm}}$

$K = 5 + (-20)$

$K = -15$

EX4 Real Life Application

* read 3 before trying me! Pg. 6

Q's = What does "of" stand for? (multiply)

bromine = $\frac{1}{30}$ of nitrogen what about is? (equation)

\downarrow

$-7 = \frac{1}{30} \cdot n$ or $-7 = \frac{1}{30}n$

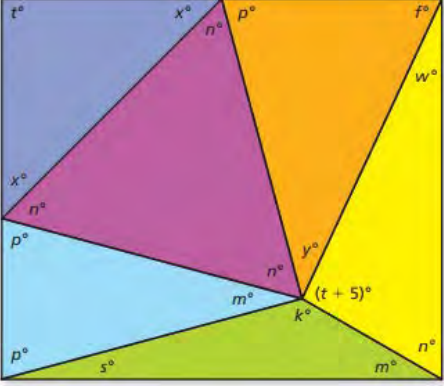
$(\frac{30}{1}) \cdot -7 = \frac{1}{30}(\frac{30}{1}) \cdot n$

$-210 = n$ so $n = -210$ now, answer

* -210°C is the melting point of nitrogen.

3

Show:

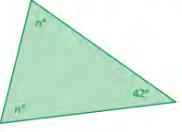


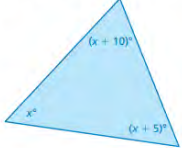
Ask:
What do you notice? What do you wonder?

Bl p.10 -11
Problem: *Activity 1 & Activity 2*

Activity 1: Solving for angles in a triangle

Work with a partner. Write an equation for each triangle. Solve the equation to find the value of the variable. Then find the angle measures of each triangle. Use a protractor to check the reasonableness of your answer.

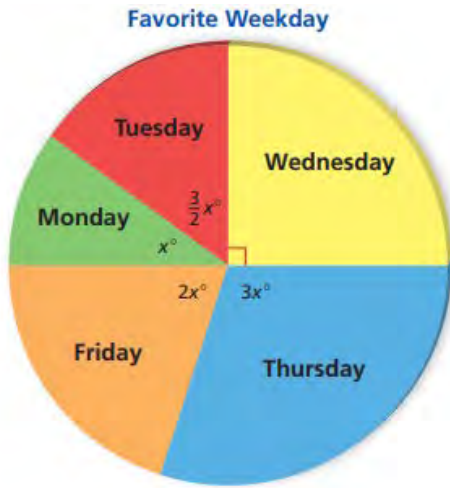
a. 

b. 

Activity 2: Problem Solving Strategy

Bl p. Pg. 12
Key Idea, *Example 1 and 2*
Key Point:

Show:

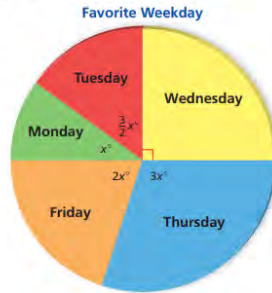


BI p. 11 Activity 3

Problem:

Work with a partner. A survey asked 200 people to name their favorite weekday. The results are shown in the circle graph.

- How many degrees are in each part of the circle graph?
- What percent of the people chose each day?
- How many people chose each day?
- Organize your results in a table.



Discussion: Is there more than one way to solve? What are your strategies?

BI p. 13 Example 3 and 4

Key Point: Example 3

EX3 using the distributive Property

$$2(1-5x)+4=-8 \text{ or } 2(1-5x)+4=-8$$

$$2-10x+4=-8 \text{ or } 2(1+(-5x))+4=-8$$

$$2+(-10x)+4=-8 \quad 2+(-10x)+4=-8$$

$$\begin{array}{r} 6+(-10x)=-8+(-6) \\ -6 \quad -8+(-6) \\ \hline -10x=-14 \\ -10 \quad -10 \\ \hline x=1.4 \end{array} \quad \begin{array}{r} -10x+6=-8-6 \\ -10x+6=-14 \\ -6 \quad -6 \\ \hline -10x=-14 \\ -10 \quad -10 \\ \hline x=1.4 \end{array}$$

Example 4

EX4: Real Life Application

Day	Miles
M	2
T	0
W	1.5
Th	0
F	

How many miles do I need to run on Friday so that my mean is 1.5 miles a day?

STEP 1: Write an equation?

recall: What is mean?
 (Average = $\frac{\text{total or sum}}{\text{\# of Values}}$)

Step 1: $\frac{2+0+1.5+0+x}{5} = 1.5 \rightarrow$ undo division

$$\cancel{5} \cdot \frac{(2+0+1.5+0+x)}{\cancel{5}} = 1.5 \cdot 5$$

$$2+0+1.5+0+x = 1.5 \cdot 5$$

$$\begin{array}{r} 3.5+x=7.5 \\ -3.5 \quad -3.5 \\ \hline x=4 \text{ miles on Friday!} \end{array}$$

4

Ask: What do you notice? What do you wonder?

5

White Board Review:
Pg. 17 #1-10

8.EE.7a & 8.EE.7b QUIZ



Classroom-Based Instruction Week at a Glance

Week 3: Solving Equations with Variables and Rewriting Equations & Formulas



8.EE.7a Give examples of linear equations in one variable with one solution, successively transforming the given equation into simpler forms, until an equivalent equation of the form $x = a$ results.

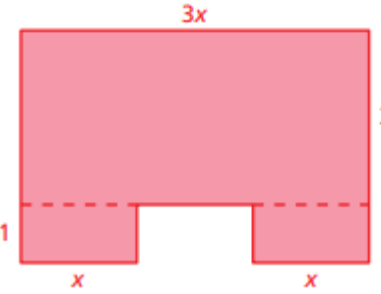
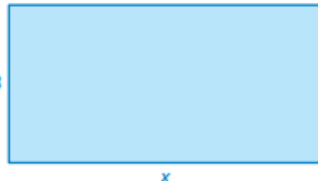
8.EE.7b Solve linear equations with rational number coefficients, including equations whose solutions require collecting like terms.

Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Small Group Instruction		
		35-45 minutes	10-15 minutes	30-45 minutes		
		Lesson Cycle: Engage – Problem – Discussion – Key Points	At least 2 aligned problems	Independent Practice Problem Sets	Collaborative Problem Sets	Teacher Small Group
Day 1: BI Lesson 1.3: Solving Equations with Variables I can solve equations with variables on both sides.		1.3 Pg. 18-19 Problem: Activity 1 & 2 Discussion: How can we solve an equation when there is a variable on both sides of the equation? How do we get the variables all together? Key Point: Example 1 & 2	Pg. 20 "On your own" #1-3	pg. 23 #6-15	Pg. 23 #1-5	Teacher choice based on student need
Day 2: BI Lesson 1.3: Solving Equations with Variables I can solve equations with variables on both sides.		1.3 Pg. 21 Problem: On your Own #4 Discussion: Does every equation have a solution? Is it possible to have more than one solution? Key Point: Example 4 & 5	Pg. 21 "On Your Own" #5-7	pg. 23-25 #'s 17-29 odd, 30-36	Pg.25 #37-38	RAP-J 1.3 Practice all
Day 3: BI Lesson 1.4: Rewriting Equations and Formulas I can rewrite equations to solve for one variable in terms of the other variable(s).		1.4 Pg. 26, 28 Problem: Activity 1 (a-c) Discussion: Why is it beneficial to rearrange formulas? How can you use one formula to write a formula for a different measurement or variable? Key Point: Example 1 & 2	Pg. 27 Activity 2 And pg. 28 "On Your Own" #1-6	Pg. 30 # 3-13	Pg. 30-31 #1-2 22, 23	Teacher choice based on student need

<p>Day 4: BI Lesson 1.4: Rewriting Equations and Formulas I can rewrite equations to solve for one variable in terms of the other variable(s).</p>	<p>1.4 Pg. 27, 29 Problem: Activity 2 Discussion: How does what we learned yesterday help us today? Can we arrange 3D formulas the same was as 2D? Do you think rewriting and rearranging works for all formulas? Key Point: Example 3 & 4</p>	<p>RAP –J 1.4 Practice all</p>	<p>pg. 31 #14-19</p>	<p>Pg. 31 #20-21</p>	<p>Teacher choice based on student need</p>
<p>Day 5: BI Lesson I can assess my understanding of solving equations with variables on both sides and rewriting formulas for given variables.</p>	<p>8.EE.7a QUIZ 8.EE.7b QUIZ</p>				

Introduction to New Material

Week 3: Solving Equations with Variables and Rewriting Equations & Formulas

Day	Engage	Problem	Key Ideas
1	<p>Show: Pg. 18.g</p>  <p>Ask: What do you notice? What do you wonder?</p>	<p>BI p. 18 Activity 1 Perimeter & Area Problem:</p> <p>Work with a partner.</p> <ul style="list-style-type: none"> Each figure has the unusual property that the value of its perimeter (in feet) is equal to the value of its area (in square feet). Write an equation for each figure. Solve each equation for x. Use the value of x to find the perimeter and the area of each figure. Describe how you can check your solution. <p>Have students do a-g as needed.</p> <p>a.</p>  <p>Discussion: <i>How can we solve an equation when there is a variable on both sides of the equation?</i> <i>How do we get the variables all together?</i></p>	<p>BI p. 20 Key Ideas, Example 1 and 2</p> <p>Key Point:</p> <ul style="list-style-type: none"> Add or subtract to get the variable to one side. Choose the side that makes the most sense More than one way to do the first step (move to the left or right) <div data-bbox="1312 592 1848 1088" style="border: 1px solid black; padding: 5px;"> <p>[1.3] Solving Equations w/ Variables on Both Sides</p> <p>Note: Must get all variables to one side and constants to the other.</p> <p>* <u>Constant Term</u>: A term with no variable. "Constantly alone!"</p> $3x + 4x - 2 = 7$ <p style="text-align: center;"> \downarrow constant \downarrow constant </p> <p>EX1: Vars on Both Sides</p> $\begin{array}{r} 15 - 2x = -7x \\ + 2x \quad + 2x \\ \hline 15 = +5x \end{array}$ <p style="text-align: center;">\leftarrow get x alone!</p> $\begin{array}{r} 15 = +5x \\ -5 \quad -5 \\ \hline -3 = x \\ \boxed{x = -3} \end{array}$ <p>Note: move variables to the side that makes the most sense!</p> </div> <div data-bbox="1312 1112 1848 1404" style="border: 1px solid black; padding: 5px;"> <p>EX2: Now add in distributive Property</p> $\begin{array}{r} -2(x-5) = 6(2-\frac{1}{2}x) \\ -2(x) + 2(-5) = 6(2) + 6(-\frac{1}{2}x) \\ -2x + 10 = 12 + (-3x) \\ + 3x \qquad \qquad \qquad + 3x \\ \hline 1x + 10 = 12 \\ -10 \quad -10 \\ \hline \boxed{x = 2} \end{array}$ </div>

2

Show:

Solve $3 - 4x = -7 - 4x$.

$$3 - 4x = -7 - 4x$$

$$\begin{array}{r} \rightarrow +4x \quad +4x \\ \hline 3 = -7 \quad \times \end{array}$$

Ask:

What do you notice? What do you wonder?

BI p.
Problem: Pg. 21 "On Your Own" #4

4. $2x + 1 = 2x - 1$

Discussion: *Does every equation have a solution? Is it possible to have more than one solution?*

BI p.Pg. 21-22 Activity 4 and 5
Key Point:

EX4 No Solutions!

$$\begin{array}{r} 3 - 4x = -7 - 4x \rightarrow \text{impossible} \\ +4x \quad +4x \\ \hline 3 = -7 \text{ (Not true)} \\ \text{NO SOLUTION} \end{array}$$

practice
 $6(5-2v) = -4(3v+1) \rightarrow \text{explain to me why?}$
No Solu.

EX5: Writing and solving an Equation
Find the perimeter and Area
Start: What do we know? 7

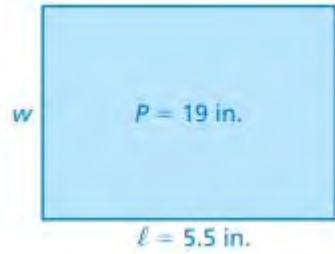
$$\begin{array}{r} 2x-3 = 3x-10 \\ -2x \quad -2x \\ \hline -3 = x-10 \\ +10 \quad +10 \\ \hline x = 7 \end{array}$$

$$\begin{array}{c} 2x-3 \\ \square \\ 3x-10 \end{array}$$

Next: plug back in to determine side length
 $2(7)-3 = 11$

Last: evaluate & find perimeter
 $7+7+11+11$
or $2(7)+2(11)$
 $p = 14+22 = 36 \text{ units}$
 $A = 7(11) = 77 \text{ units}^2$

Show: Pg. 26 Activity 1a



Ask:
What do you notice? What do you wonder?

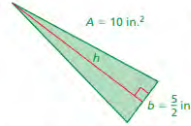
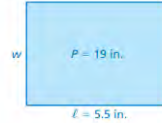
3

BI p. 26 Activity 1a-1c

Problem: Can you rearrange the formula to solve for various variables? If $P=2l+2w$, can we get w alone instead of P ?

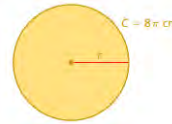
Work with a partner.

- a.
- Write a formula for the perimeter P of a rectangle.
 - Solve the formula for w .
 - Use the new formula to find the width of the rectangle.



- b.
- Write a formula for the area A of a triangle.
 - Solve the formula for h .
 - Use the new formula to find the height of the triangle.

- c.
- Write a formula for the circumference C of a circle.
 - Solve the formula for r .
 - Use the new formula to find the radius of the circle.



Discussion:

Why is it beneficial to rearrange formulas?
How can you use one formula to write a formula for a different measurement or variable?

BI p. 28 Key Vocabulary & Examples 1 & 2
Key Point:

1.4 Rewriting Equations and Formulas

* Literal Equation: An equation that has 2 or more variables.
ex: $y = mx + b$, $y = 2x - 1$, $A = L \cdot w$
 $P = 2L + 2w$, $A = \frac{1}{2}bh$, $I = prt$

EX1 Solving Literal Equations

Solve $2y + 5x = 6$ solve for y .

$$\frac{2y}{2} = \frac{6 + (-5x)}{2}$$

$$y = 3 + \frac{-5}{2}x$$

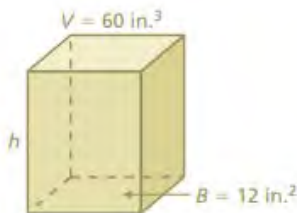
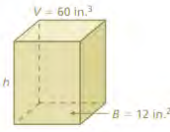
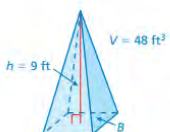
$$y = -\frac{5}{2}x + 3 \leftarrow \text{put your variables 1st}$$

EX2 Rewrite Known Formulas

$S = \pi r^2 + \pi rL$ solve for L .

$$\frac{S - \pi r^2}{\pi r} = \frac{\pi rL}{\pi r}$$

$$L = \frac{S - \pi r^2}{\pi r}$$

4	<p>Show:</p>  <p>Ask: What do you notice? What do you wonder?</p>	<p>BI p.27 Activity 2 a-d Problem:</p> <p>Work with a partner.</p> <p>a.</p> <ul style="list-style-type: none"> • Write a formula for the volume V of a prism. • Solve the formula for h. • Use the new formula to find the height of the prism.   <p>b.</p> <ul style="list-style-type: none"> • Write a formula for the volume V of a pyramid. • Solve the formula for B. • Use the new formula to find the area of the base of the pyramid. <p>Continue as needed with c and d. Discussion: How does what we learned yesterday help us today? Can we arrange 3D formulas the same as 2D? Do you think rewriting and rearranging works for all formulas?</p>	<p>BI p. Pg. 29 Key Idea & Example 3 & 4 Key Point:</p> <ul style="list-style-type: none"> • Focus on how to remove a fraction • Simplify to new equation fully • When to use decimals and when to use fractions
5	<p>8.EE.7a QUIZ 8.EE.7b QUIZ</p>		

Classroom-Based Instruction Week at a Glance



Week 4: Congruent Figures, Translations, Reflections, and Rotations



8.G.1 Verify experimentally the properties of translations.

8.G.2 Understand that a two dimensional figure is congruent to another if the second can be obtained from the first by a sequence of translations; given two congruent figures, describe a sequence that exhibits the congruence between them.

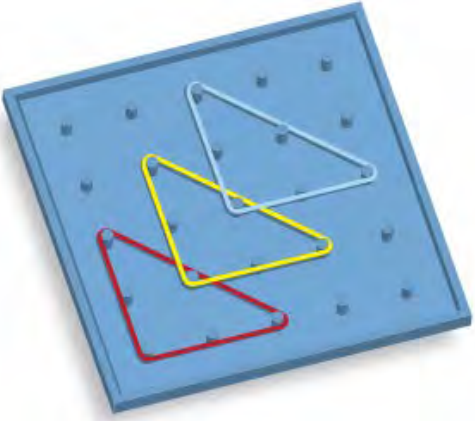

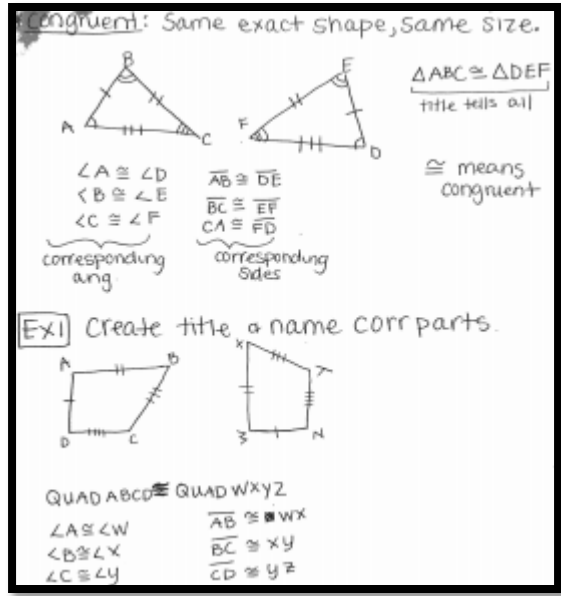
8.G.3 Describe the effect of translations on two-dimensional figures using coordinates.

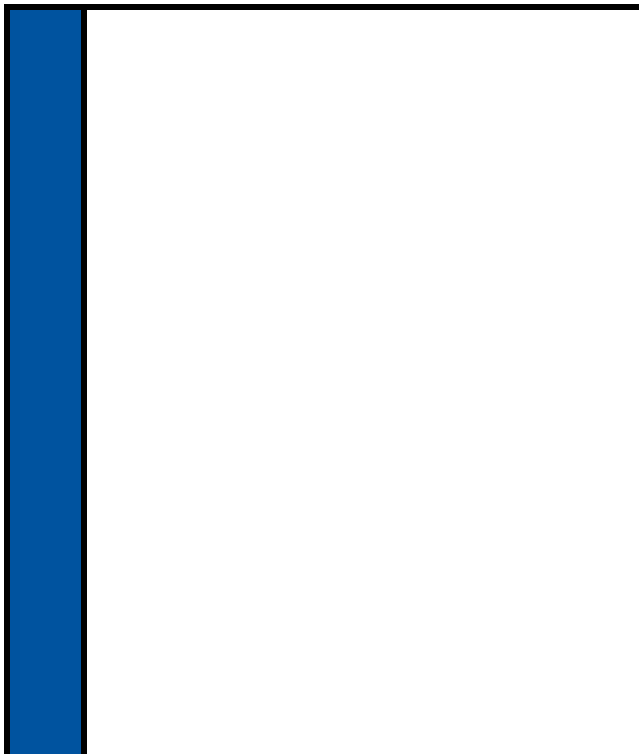
Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Small Group Instruction		
		35-45 minutes	10-15 minutes	30-45 minutes		
		Lesson Cycle: Engage – Problem – Discussion – Key Points	At least 2 aligned problems	Independent Practice Problem Sets	Collaborative Problem Sets	Teacher Small Group
Day 1: BI Lesson 2.1: Congruent Figures I can name corresponding angles and corresponding sides of congruent figures. I can identify congruent figures.		2.1 Pg. 42 – 45 Problem: Activity 1 Discussion: <i>How can you identify congruent triangles?</i> Key Point: Example 1 & 3	Pg. 44-45 "On Your Own" 1-3	BI pg. 7 #4-12	Pg. 7 #13-15	Pg. 7 #1-3
Day 2: BI Lesson 2.2: Translations I can identify translations. I can translate figures in the coordinate plane.		2.2 Pg. 48 - 49 Problem1: Activity 1 Problem 2: Activity 4 Discussion: What does it mean to translate? How do you get from one shape to the other? What is true about both shapes? Key Point: Example 1-3	Pg. 50 On your own #1-5	pg.52-53 # 10-16, 19-20	Pg. 53 #17-18, 21-23	Pg. 52 #1-9
Day 3: BI Lesson 2.3: Reflections I can identify reflections. I can reflect figures in the x-axis or the y-axis of the coordinate plane		2.3 Pg. 54 - 55 Problem: Example 1 Discussion: <i>How would you describe a reflection? What is true about both shapes?</i> Key Point: Examples 2-3	Pg. 57 "On Your Own" #4	Pg. 58 # 4-17	Pg. 59 #19-26	Pg. 58 #1-3 or RAP-J 2.3 Practice

<p>Day 4: Lesson 2.4: Rotations I can identify rotations.</p> <p>I can rotate figures in the coordinate plane.</p>	<p>2.4 Pg. 60-62 Problem 1: Activity 2 Problem 2: Example 1 Discussion: What are the three basic ways to move an object on a plane? What happens to an object that has been turned on a coordinate plane? Key Point: Example 2 - 4</p>	<p>Pg. 64 Example 5 & "On Your Own" #4-5</p>	<p>pg. 65-66 #7-25 odd</p>	<p>Pg. 66-67 #14-28 even</p>	<p>PG. 65 # 1-6</p>
<p>I can assess my understanding of transformations.</p>	<p>8.G.1, 8.G.2, 8.G.3 QUIZ</p>				

Introduction to New Material

Week 4: Congruent Figures, Translations, Reflections, and Rotations

Day	Engage	Problem	Key Ideas
1	<p>Show:</p>  <p>Ask: What do you notice? What do you wonder?</p>	<p>BI p. Pg. 42 Essential Question and Activity 1 all</p> <p>Work with a partner.</p> <ul style="list-style-type: none"> • Which of the geoboard triangles below are congruent to the geoboard triangle at the right? • Form each triangle on a geoboard. • Measure each side with a ruler. Record your results in a table. • Write a conclusion about the side lengths of triangles that are congruent.  <p>Discussion: How can you identify congruent triangles?</p>	<p>BI p.44-45 Key Ideas and Examles 1 and 3 (Skip 2) With an adiiional NHA created Example</p>  <p>Ex 2 on anchor chart below is Example 3 from Big Ideas Pg. 45 Ex 3 on the anchor chart below is the added NHA example.</p>



Ex 2 using Congruent Figures

$ABCD \cong JKLM$

$\overline{LM} \cong \square$
 $\overline{JM} \cong \square$
 $\angle L \cong \square$

What is the perimeter of JKLM

Ex 3 Determining Congruent Triangles

Side-Side-Side (SSS)

Side-Angle-Side (SAS)

Angle-Side-Angle (ASA)

2

Show:



Ask:

What do you notice? What do you wonder?

BI p. 48 -49

Activity 1 a-c

NOTE: Students will need tessellation blocks

Work with a partner. Can you make the tessellation by translating single tiles that are all of the same shape and design? If so, show how.

a. Sample:

Tile Pattern

Single Tiles

b.

c.

BI p.pg. 50-51 key vocabulary. Key Ideas & Activity 1-3

Activity 4

NOTE: students will need graph paper

Work with a partner.

- Draw a rectangle in a coordinate plane. Find the dimensions of the rectangle.
- Move each vertex 3 units right and 4 units up. Draw the new figure. List the vertices.
- Compare the dimensions and the angle measures of the new figure to those of the original rectangle.
- Are the opposite sides of the new figure still parallel? Explain.
- Can you conclude that the two figures are congruent? Explain.
- Compare your results with those of other students in your class. Do you think the results are true for any type of figure?

2.2 Translations

* **Transformation:** when you make changes to one figure to create a second figure. The new figure is called an **Image**.

* **Image:** The result of a transformation



* **Translation:** to slide, move.

EX1 Translating on a coordinate plane.

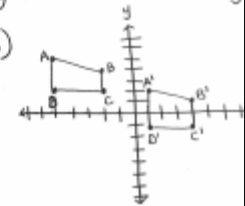
Note: $\uparrow = y + \text{something}$ $\downarrow = y - \text{something}$

$\rightarrow = x + \text{something}$ $\leftarrow = x - \text{something}$

coordinate: $(x, y) \rightarrow (x+b, y-3)$

Notation: words: right b, down 3

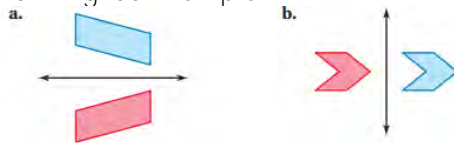
original	Image
$A(5,5)$	$A'(1,2)$
$B(2,4)$	$B'(4,1)$
$C(-2,2)$	$C'(4,-1)$
$D(-5,2)$	$D'(1,-1)$



Next: $(x', y') \rightarrow (x-2, y)$

Shapes are congruent

Show: Pg. 56 Example 1



Ask:
What do you notice? What do you wonder?

3

BI p. 56 Example 1 & "On Your Own #1-3

Tell whether the blue figure is a reflection of the red figure.

- The red figure can be *flipped* to form the blue figure.

❖ So, the blue figure is a reflection of the red figure.
- If the red figure were *flipped*, it would point to the left.

❖ So, the blue figure is *not* a reflection of the red figure.

On Your Own

Tell whether the blue figure is a reflection of the red figure. Explain.

-
-
-

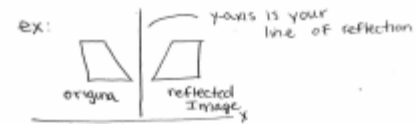
BI p.57 Example 2 & 3

Discussion: How would you describe a reflection? What is true about both shapes?

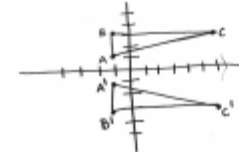
2.3 Reflections

* **Reflection:** (Flip or mirror image) creates a mirror image of the original

* **Line of reflection:** The line you flip a figure over to create a reflection



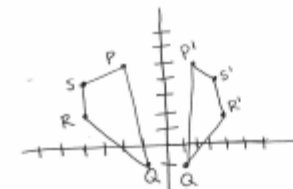
EX1 Reflecting over x-axis (going from top to bottom)



- * y-coordinates become opposite.
- * x-stays the same

original	Image
A(-1, 1)	A'(-1, -1)
B(-1, 3)	B'(-1, -3)
C(b, 3)	C(b, -3)

EX2 Reflect over the y-axis

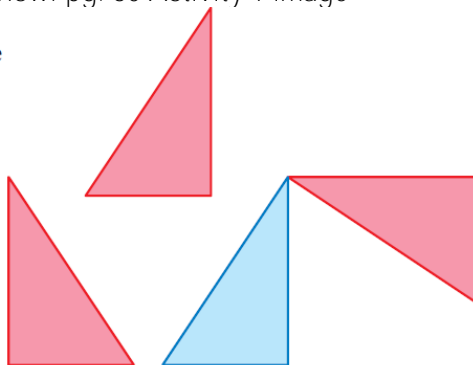


- * x-coordinate becomes opposite
- * y-stays the same

original	Image
P(-2, 5)	P'(2, 5)
Q(-1, -1)	Q'(1, -1)
R(-4, 2)	R'(4, 2)
S(-4, 4)	S'(4, 4)

Show: pg. 60 Activity 1 image

ue



Ask:
What do you notice? What do you wonder?

4

BI p. 61 Activity 2

- NOTE: Need transparency paper

Activity 2:

Work with a partner.

- Draw a rectangle in Quadrant II of a coordinate plane. Find the dimensions of the rectangle.
- Copy the axes and the rectangle onto a piece of transparent paper. Align the origin and the vertices of the rectangle on the transparent paper with the coordinate plane. Turn the transparent paper so that the rectangle is in Quadrant I and the axes align. Draw the new figure in the coordinate plane. List the vertices.
- Compare the dimensions and the angle measures of the new figure to those of the original rectangle.
- Are the opposite sides of the new figure still parallel? Explain.
- Can you conclude that the two figures are congruent? Explain.
- Turn the transparent paper so that the original rectangle is in Quadrant IV. Draw the new figure in the coordinate plane. List the vertices. Then repeat parts (c)–(e).
- Compare your results with those of other students in your class. Do you think the results are true for any type of figure?

Pg. 62 Example 1

You must rotate the puzzle piece 270° clockwise about point P to fit it into a puzzle. Which piece fits in the puzzle as shown?



Discussion: What are the three basic ways to move an object on a plane? What happens to an object that has been turned on a coordinate plane?

Looking for:

- it stays the same shape and size/congruent
- The coordinates change, become opposite, etc...

BI p.62-64

Key Point:

- Key Ideas, Example 1- Example 4

2.4 Rotations

* **Rotation:** (a turn) a transformation that is turned around a point.

* **Angle of Rotation:** 90°, 180°, 270°
clockwise or counterclockwise

90° clockwise: rotate values y becomes opposite.
 $(5, 7) \rightarrow (7, -5)$
 $(-3, 4) \rightarrow (4, +3)$

90° counter: rotates values x becomes opposite.
 $(5, 7) \rightarrow (-7, 5)$
 $(-3, 4) \rightarrow (-4, -3)$

Ex 1 Rotating around the origin

w(-4, 2) x(-3, 4) y(-1, 4) z(-1, 2)
w'(4, -2) x'(3, -4) y'(1, -4) z'(-1, -2)

* rotate values
* What becomes opposite?

180° rotation (either way)
no rotation, opposite x & y

Rotate 180°/origin
 $(5, 7) \rightarrow (-5, -7)$
 $(-3, 4) \rightarrow (3, -4)$

Ex2 Rotating around a point.

J(1,2) K(4,2) L(1,-3)
 J'(-5,-4) K'(-5,0)

* L stays the same
 * Create a 90° from the point (either ← or →)
 * Count distances

90° clockwise
 * create a 90° line behind

90° counter
 * create a 90° line forward

180° either
 * create a 180° line above or below point

90° counter (origin)
 - rotate values, x opp
 Q'(-5,4) R'(0,4) S'(0,1)

180° about S
 (creates 180° lines from original)
 Q''(-2,-5) R''(-2,0) S''(1,0)

c) how are Image 1 and Image 2 related?
 (congruent)

Ex3 More than 1 Transformation.

A(-3,-3) B(1,-3) C(1,-5)

a) Rotate 90° clockwise, then reflect over y-axis

A(-3,-3)	A'(3,3)	A''(3,3)
B(1,-3)	B'(-3,-1)	B''(3,-1)
C(1,-5)	C'(-5,-1)	C''(5,-1)

y stays opp
 x becomes opp

Classroom-Based Instruction Week at a Glance

Week 5: Similar Figures and Perimeters and Areas of Similar Figures




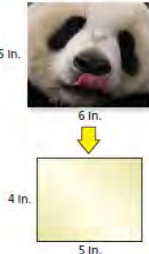
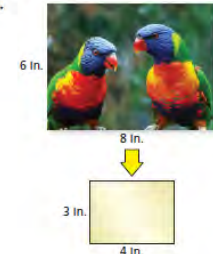
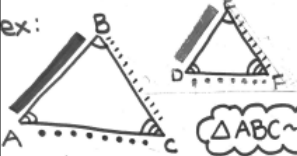
8.G.4 Understand that a two-dimensional figure is similar to another if the second can be obtained from the first by a sequence of rotations, reflections, translations, and dilations; given two similar two-dimensional figures, describe a sequence that exhibits the similarity between them.

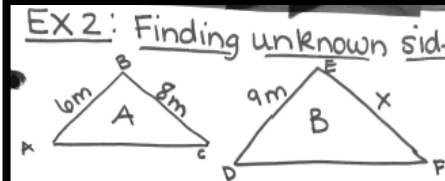
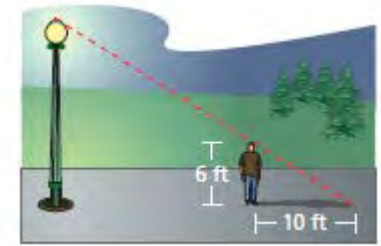
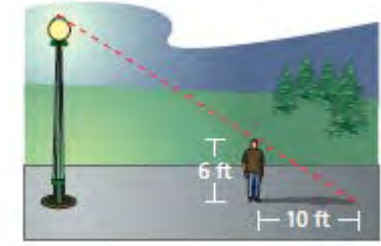


Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Small Group Instruction		
		35-45 minutes	10-15 minutes	30-45 minutes		
		Lesson Cycle: Engage – Problem – Discussion – Key Points	At least 2 aligned problems	Independent Practice Problem Sets	Collaborative Problem Sets	Teacher Small Group
Day 1: BI Lesson 2.5 Similar Figures I can name corresponding angles and corresponding sides of similar figures. I can identify similar figures. I can find unknown measures of similar figures.		2.5 Pg. 70 Problem: Activity 1 Discussion: What strategies did you use to determine if the photos would end up distorted? How can proportions help in everyday life? Key Point: Example 1-2	Pg. 73 "On Your Own #2-3"	pg. 74 # 6-11	pg. 75 # 14-16	pg. 74 # 1-5 and mini-assessment on pg. T-25
Day 2: BI Lesson 2.5 Similar Figures I can name corresponding angles and corresponding sides of similar figures. I can identify similar figures. I can find unknown measures of similar figures.		2.5 Pg. 73, 75 Problem: Pg. 75 #17 Discussion: What strategy did you use to solve? Key Point: Example 3	Pg. 73 "On Your Own" #4	Pg. 74 # 12-13 & RAP-J 2.5 Practice Pg.	Pg. 75 #18-20	Teacher choice based on student need
Day 3: BI Lesson 2.6: Perimeters and Areas of Similar Figures I can understand the relationship between perimeters of similar figures. I can understand the relationship between <u>areas</u> of similar figures. I can find ratios of perimeters and <u>areas</u> for similar figures.		2.6 Pg. 76-79 Problem: Activity 1-3 Discussion: How does changing the area or perimeter of similar figures effect the side lengths? Key Point: Example 1 & 2	p.g 78 "On your Own" #1-2	Pg. 80 # 4-11	Pg. 80 # 12-13	Pg. 80 # 1-3

<p>Day 4: BI Lesson 2.6: Perimeters and Areas of Similar Figures I can understand the relationship between perimeters of similar figures.</p> <p>I can understand the relationship between areas of similar figures.</p> <p>I can find ratios of perimeters and areas for similar figures.</p> <p>I can use proportions to find perimeters and areas of similar figures.</p>	<p>2.6 Pg. 76 Problem: Activity 3 Discussion: <i>Does it matter where the values go in the proportion?</i> Key Point: Example 3</p>	<p>"On Your Own" Pg. 79 #3</p>	<p>Pg. 81 #14-15 & Recourses by Chapter 2.6 Practice A all</p>	<p>Pg. 81 #17-20</p>	<p>Mini-assessment Pg. T-81</p>
<p>Day 5: I can demonstrate mastery on 8.EE.7a, 8.EE.7b, 8.G.1, 8.G.2, 8.G.3, 8.G.4</p>	<p>Mid-Point Quiz 8.EE.7a, 8.EE.7b, 8.G.1, 8.G.2, 8.G.3, 8.G.4</p>				

Introduction to New Material

Week 5: Similar Figures and Perimeters and Areas of Similar Figures

Day	Engage	Problem	Key Ideas										
1	<p>Show:</p>  <p>Original photograph</p> <p>Ask: What do you notice? What do you wonder?</p>	<p>BI p. 70 Activity 1 Work with a partner. You are trying to reduce the photograph to the indicated size for a nature magazine. Can you reduce the photograph to the indicated size without distorting or cropping? Explain your reasoning.</p> <p>a. </p> <p>b. </p> <p>Discussion: what strategies did you use to determine if the photos would end up distorted? How can proportions help in everyday life?</p>	<p>BI p.72 Key Idea, Example 1 & 2</p> <ul style="list-style-type: none"> Similar Figures Proportionate <div data-bbox="1360 475 1969 1157" style="border: 1px solid black; padding: 5px;"> <p>* Similar Figures: Same exact shape, different size. " ~ " = means Similar.</p> <p>ex: </p> <p>$\triangle ABC \sim \triangle DEF$</p> <table border="0"> <tr> <td><u>Angles</u></td> <td><u>side lengths</u></td> <td rowspan="3">} When shapes are similar their side lengths are <u>proportionate</u></td> </tr> <tr> <td>$\angle A \cong \angle D$</td> <td>$\overline{AB} \sim \overline{DE}$</td> </tr> <tr> <td>$\angle B \cong \angle E$</td> <td>$\overline{AC} \sim \overline{DF}$</td> </tr> <tr> <td>$\angle C \cong \angle F$</td> <td>$\overline{BC} \sim \overline{EF}$</td> <td></td> </tr> </table> <p>EX1: Are we similar? *IF 2 Figures are similar, their sides are proportionate. Set up a proportion to see if they are similar.</p> <p>$3 \frac{\square}{6} \quad 2 \frac{\square}{4} \quad \frac{3}{6} \neq \frac{2}{4} \quad \frac{3 \cdot 4}{6 \cdot 2} = \frac{12}{12} = 1$</p> <p>does it work? $\frac{3}{6} = \frac{2}{4}$</p> </div>	<u>Angles</u>	<u>side lengths</u>	} When shapes are similar their side lengths are <u>proportionate</u>	$\angle A \cong \angle D$	$\overline{AB} \sim \overline{DE}$	$\angle B \cong \angle E$	$\overline{AC} \sim \overline{DF}$	$\angle C \cong \angle F$	$\overline{BC} \sim \overline{EF}$	
<u>Angles</u>	<u>side lengths</u>	} When shapes are similar their side lengths are <u>proportionate</u>											
$\angle A \cong \angle D$	$\overline{AB} \sim \overline{DE}$												
$\angle B \cong \angle E$	$\overline{AC} \sim \overline{DF}$												
$\angle C \cong \angle F$	$\overline{BC} \sim \overline{EF}$												

			<p>EX 2: Finding unknown side lengths</p>  <p>$\triangle ABC \sim \triangle DEF$ Triangle A <u>is</u> similar to Triangle B. Find x.</p> <p>1) Set up a proportion. $\overline{AB} \sim \overline{DE}$ and $\overline{BC} \sim \overline{EF}$ so...</p> $\frac{AB}{DE} = \frac{BC}{EF} \rightarrow \frac{6}{9} = \frac{8}{x} \quad \frac{8(9)}{6} = x$ <p style="text-align: center;">Fish it!</p> $\frac{72}{6} = 12$ <p style="text-align: center;">X = 12</p>
2	<p>Show: Pg. 75 #17 STREETLIGHT image</p>  <p>Ask: What do you notice? What do you wonder?</p>	<p>BI p.75 #17 Streetlight</p>  <p>A person standing 20 feet from a street light casts a shadow as shown. How many times taller is the streetlight than the person? Assume the triangles are similar.</p> <p>Discussion: what strategy did you use? What mistakes did you make? what are some misconceptions when solving this problem?</p>	<p>BI p.73 Example 3 Create Proportions</p> <p>EXAMPLE 3 Real-Life Application</p>  <p>An artist draws a replica of a painting that is on the Berlin Wall. The painting includes a red trapezoid. The shorter base of the similar trapezoid in the replica is 3.75 inches. What is the height h of the trapezoid in the replica?</p> <p>Because the trapezoids are similar, corresponding side lengths are proportional. So, write and solve a proportion to find h.</p> $\frac{3.75}{15} = \frac{h}{12}$ <p style="text-align: right;">Write a proportion.</p> $12 \cdot \frac{3.75}{15} = 12 \cdot \frac{h}{12}$ <p style="text-align: right;">Multiplication Property of Equality</p> $3 = h$ <p style="text-align: right;">Simplify.</p> <p>So, the height of the trapezoid in the replica is 3 inches.</p> 

Show:



Ask:
What do you notice? What do you wonder?

BI p. 76 Activities 1-3





Materials: Pattern blocks

Work with a partner. Use pattern blocks to make a figure whose dimensions are 2, 3, and 4 times greater than those of the original figure.







Reminders: How do you find perimeter? Area? See Pg. T-76 for additional guiding questions during the activity.

Work with a partner. Copy and complete the table for the perimeter P of each figure in Activity 1. Describe the pattern.

Figure	Original Side Lengths	Double Side Lengths	Triple Side Lengths	Quadruple Side Lengths
	$P = $ 			
	$P = $ 			

Work with a partner. Copy and complete the table for the area A of each figure in Activity 1. Describe the pattern.

Figure	Original Side Lengths	Double Side Lengths	Triple Side Lengths	Quadruple Side Lengths
	$A = $ 			
	$A = $ 			

Discussion:

- How does changing the area or perimeter of similar figures effect the side lengths?
- What information do you need to know to find the dimensions of a figure that is similar to another figure? (#5-6 on Pg. 77 "What's Your Answer?")

BI p. 78-79 Key Idea & Example 1 and Key Idea and Example 2


Common Misconception: Ratio order matters ie: Red to blue, not Blue to red, etc...

2.6 Ratios of Perimeters & Areas of Similar Figures

Notes: From Pg. 78 + 79

EX1 Ratio of Perimeters

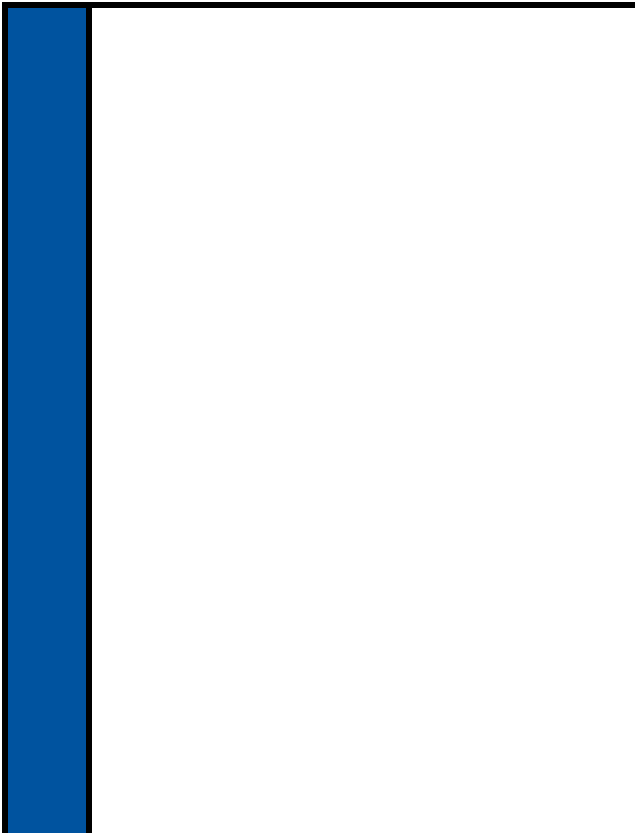
* When 2 figures are similar, the ratio of their perimeters are equal to the ratio of the side lengths.



Quad ABCD ~ Quad EFGH so, $\overline{AB} \sim \overline{EF}$

so, $\frac{4in}{3in} = \frac{2in}{3in}$ ← create the ratio → simpl

* Therefore the ratio of the sides is $\frac{2in}{3in}$ → That means the ratio of the perimeter is also $\frac{2in}{3in}$



EX1: Practice

1) What is the ratio of Figure A to Figure B? What is the ratio of Figure A's perimeter to figure B's perimeter?

$\frac{A}{B} = \frac{21}{15} = \frac{7}{5}$ so perimeter ratio = $\frac{7}{5}$

* why not $\frac{5}{7}$? (wants A to B, NOT B to A.)

EX2: Ratio of Areas (of similar figures)

* When 2 figures are similar, the ratio of their areas is equal to the square of the ratio of its sides.

ex:

Sides: small $\Delta: 6$, Big $\Delta: 10$ → ratio = $\frac{3}{5}$

Area: $(\frac{3}{5})^2 = \frac{9}{25}$ ratio of the Areas

Square the ratio

Show:

Ask:
What do you notice? What do you wonder?

BI p. 77 Activity 4

BI p. 79 Example 3

EX3 Using ratios/proportions to find actual Areas & Perimeters.

* The swimming pool is similar to the volleyball court.

Area: 200 yds²
perimeter: 60 yds

A: ?
P: ?



Classroom-Based Instruction Week at a Glance

Week 6: Dilations



8.G.3 Describe the effect of dilations on two-dimensional figures using coordinates.

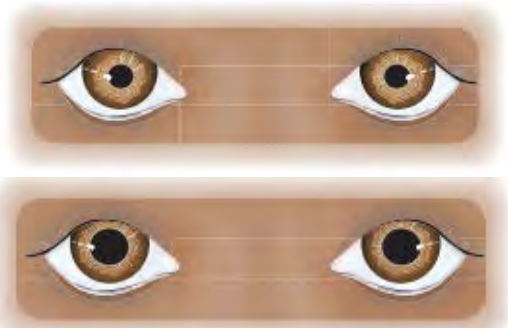
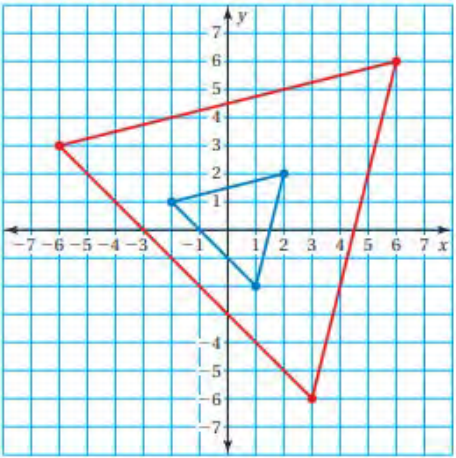

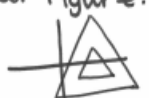
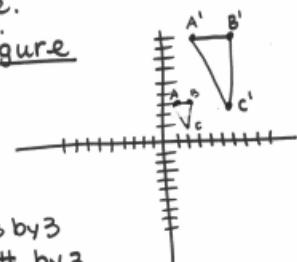
8.G.4 Understand that a two-dimensional figure is similar to another if the second can be obtained from the first by a sequence of rotations, reflections, translations, and dilations; given two similar two-dimensional figures, describe a sequence that exhibits the similarity between them.

Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Small Group Instruction		
		35-45 minutes	10-15 minutes	30-45 minutes		
		Lesson Cycle: Engage – Problem – Discussion – Key Points	At least 2 aligned problems	Independent Practice Problem Sets	Collaborative Problem Sets	Teacher Small Group
Day 1: BI Lesson 2.7: Dilations I can define dilations. I can identify dilations.		2.7 pg. 82-86 Problem: Activity 1 Pg. 82 Discussion: <i>How are the two triangles related? Did the size and shape of an object change when we perform a translation, reflection or rotation?</i> Key Point: Example 1 & 2	Pg. 84-85 "On Your Own" #1-3	Pg. 87 #4-13, 16		Pg. 87 #1-3
Day 2: BI Lesson 2.7: Dilations I can identify dilations. I can dilate figures in the coordinate plane.		2.7 pg. 85 Problem: Example 3 Discussion: <i>How can you enlarge or reduce a figure in the coordinate plane?</i> Key Point: Example 4	"On Your Own" # 4-5	Pg. 87-88 #14, 15, 17, 19, 23, 25	Pg. 87-88 #18, 24, 26, 30	Teacher choice based on student need
Day 3: BI Lesson 2.7 Dilations I can use more than one transformation to find images of figures.		2.7 pg. 83 Problem: Activity 3 Discussion: <i>How could enlarging or reducing a figure be helpful in careers? Explain...</i> Key Point: Example 5	"On your Own" #6	Pg. 88 #20-22, 27-29	Pg. 88 #33-36	Mini-Assessment pg. T-89

<p>Day 4: BI Lesson 2.7 Dilations I can use more than one transformation to find images of figures.</p>	<p>2.7 pg. 89 Problem: #32 Reasoning Discussion: Is there more than one way to get from an original picture to the resulting image? Prove it.</p>	<p>n/a</p>	<p><i>Recourses by</i> <i>Chapter 2.7</i> <i>Practice B</i></p>	<p><i>2.5-2.7 Practice</i> <i>Quiz BI Pg. 90</i></p>	<p><i>RAP-J 2.7</i> <i>Practice</i></p>
<p>Day 5: BI Lesson 2.7 Dilations</p>	<p>Whiteboard Review Pg. 95 #25-29</p>	<p>8.G.3 QUIZ 8.G.4 QUIZ</p>			

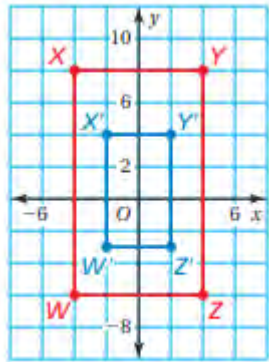
Introduction to New Material

Week 6: Dilations

Day	Engage	Problem	Key Ideas						
1	<p>Show:</p>  <p>Ask: What do you notice? What do you wonder?</p>	<p>BI p. Activity 1 Work with a partner. Write the coordinates of the vertices of the blue triangle. Then write the coordinates of the vertices of the red triangle.</p> <ol style="list-style-type: none"> How are the two sets of coordinates related? How are the two triangles related? Explain your reasoning. <p>Note: looking for similar: same shape, different size.</p>  <ol style="list-style-type: none"> Draw a green triangle whose coordinates are twice the values of the corresponding coordinates of the blue triangle. How are the green and blue triangles related? Explain your reasoning. How are the coordinates of the red and green triangles related? How are the two triangles related? Explain your reasoning. <p>Discussion: How are the two triangles related? Did the size and shape of an object change when we perform a translation, reflection or rotation?</p>	<p>BI p.84 Key vocabulary, Key Ideas, Example 1 and Example 2</p> <p>Vocab:</p> <ul style="list-style-type: none"> Dilation Center of dilation Scale factor <p>* Dilation: means to enlarge or shrink a figure. - a dilation is similar to the original figure.</p> <p>ex:  or </p> <p>* Scale Factor or k: tells you how much to enlarge or shrink the figure.</p> <p>ex: $k=3$ means to blow up the figure 3 times $k=\frac{1}{2}$ means to shrink the figure.</p> <p>EX1 Dilate a Figure</p> <table border="0"> <tr> <td>$A(1,3)$</td> <td>$A'(3,9)$</td> </tr> <tr> <td>$B(2,3)$</td> <td>$B'(6,9)$</td> </tr> <tr> <td>$C(2,1)$</td> <td>$C'(6,3)$</td> </tr> </table> <p>$K=3 \rightarrow$ Multiply all #s by 3 Just multiply all # by 3 to get new coordinates.</p> 	$A(1,3)$	$A'(3,9)$	$B(2,3)$	$B'(6,9)$	$C(2,1)$	$C'(6,3)$
$A(1,3)$	$A'(3,9)$								
$B(2,3)$	$B'(6,9)$								
$C(2,1)$	$C'(6,3)$								

2

Show:



Ask:
What do you notice? What do you wonder?

BI p. 85 Example 3 Dilating a figure
Draw the image of rectangle WXYZ after a dilation with a scale factor of 0.5. Identify the type of dilation.

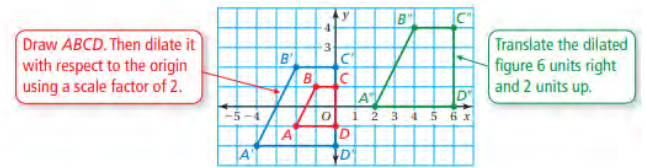
Vertices of WXYZ

- W(-4, -6)
- X(-4, 8)
- Y(4, 8)
- Z(4, -6)

Discussion: How can you enlarge or reduce a figure in the coordinate plane? How can you tell the difference between an enlargement or a reduction?

BI p.86 Example 4
Remind students the importance of labeling the images and tracking the coordinates in a table.

The vertices of a trapezoid are $A(-2, -1)$, $B(-1, 1)$, $C(0, 1)$, and $D(0, -1)$. Dilate the trapezoid with respect to the origin using a scale factor of 2. Then translate it 6 units right and 2 units up. What are the coordinates of the image?



The coordinates of the image are $A''(2, 0)$, $B''(4, 4)$, $C''(6, 4)$, and $D''(6, 0)$.

The image of a translation, reflection, or rotation is congruent to the original figure, and the image of a dilation is similar to the original figure. So, two figures are similar when one can be obtained from the other by a sequence of translations, reflections, rotations, and dilations.

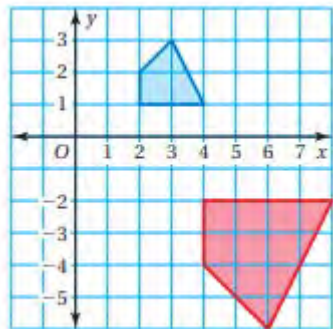
Example of using a table to organize the coordinates and the image "name".

- Set up a table to organize the vertices, then draw each trapezoid.

Vertices of ABCD	Vertices of A' B' C' D'	Vertices of A'' B'' C'' D''
$A(-2, -1)$	$A'(-4, -2)$	$A''(2, 0)$
$B(-1, 1)$	$B'(-2, 2)$	$B''(4, 4)$
$C(0, 1)$	$C'(0, 2)$	$C''(6, 4)$
$D(0, -1)$	$D'(0, -2)$	$D''(6, 0)$

3

Show: Image from Pg.



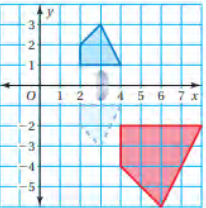
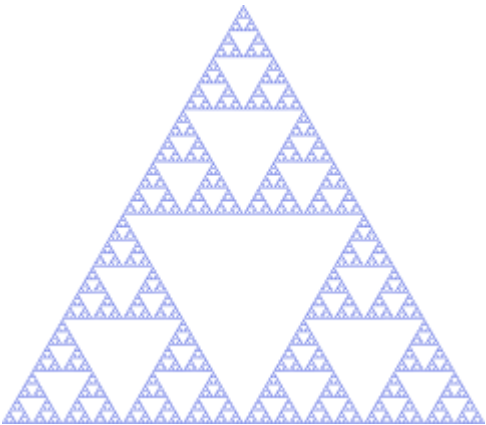


Ask:
What do you notice? What do you wonder?

BI p. 83 Activity 3
Work with a partner. Make a table that summarizes the relationships between the original figure and its image for all four types of transformations.

- Students should be thinking about sides, angles, size, shape, orientation, etc...

BI p. 86 Example 5 (Describing a sequence of transformations)

- Show students a step by step, drawing out each transformation.
- Might be beneficial to show multiple ways
- Have students identify the scale factor and how they know

		<p>Ex:</p> <table border="1"> <tr> <td>Translation</td> <td>same size and shape, slides left, right, up and/or down</td> </tr> <tr> <td>Reflection</td> <td>same size and shape, mirror image of original</td> </tr> <tr> <td>Rotation</td> <td>same size and shape, rotated about a point</td> </tr> <tr> <td>Dilation</td> <td>different size, same shape, the image is an enlargement or reduction of the original</td> </tr> </table>	Translation	same size and shape, slides left, right, up and/or down	Reflection	same size and shape, mirror image of original	Rotation	same size and shape, rotated about a point	Dilation	different size, same shape, the image is an enlargement or reduction of the original	<p>The red figure is similar to the blue figure. Describe a sequence of transformations in which the blue figure is the image of the red figure.</p> <p>From the graph, you can see that the blue figure is one-half the size of the red figure. So, begin with a dilation with respect to the origin using a scale factor of $\frac{1}{2}$.</p> <p>After dilating, you need to flip the figure in the x-axis.</p> <p>So, one possible sequence of transformations is a dilation with respect to the origin using a scale factor of $\frac{1}{2}$ followed by a reflection in the x-axis.</p> 
Translation	same size and shape, slides left, right, up and/or down										
Reflection	same size and shape, mirror image of original										
Rotation	same size and shape, rotated about a point										
Dilation	different size, same shape, the image is an enlargement or reduction of the original										
<p>4</p>	<p>Show:</p>  <p>Ask: What do you notice? What do you wonder?</p>	<p>BI Pg. 89 #32 Reasoning</p> <p>A triangle is dilated using a scale factor of 3. The image is then dilated using a scale factor of 0.5. What scale factor could you use to dilate the original triangle to get the final image of the triangle? Explain.</p> <p><i>**Encourage students to graph the dilations and/or use a table to model with mathematics.</i></p> <p>Discussion: Is there more than one way to get from an original picture to the resulting image? Prove it.</p>	<p>No new Key Points, extra student practice to prepare for the quiz.</p> <table border="1"> <thead> <tr> <th>Individual</th> <th>Group</th> <th>Small group</th> </tr> </thead> <tbody> <tr> <td>Recourses by Chapter 2.7 Practice B</td> <td>2.5-2.7 Practice Quiz BI Pg. 90</td> <td>RAP-J 2.7 Practice</td> </tr> </tbody> </table>	Individual	Group	Small group	Recourses by Chapter 2.7 Practice B	2.5-2.7 Practice Quiz BI Pg. 90	RAP-J 2.7 Practice		
Individual	Group	Small group									
Recourses by Chapter 2.7 Practice B	2.5-2.7 Practice Quiz BI Pg. 90	RAP-J 2.7 Practice									
<p>5</p>		<p>Whiteboard Review Pg. 95 # 25-29</p> <p>Tell whether the blue figure is a dilation of the red figure.</p> <p>25.  26. </p> <p>The vertices of a figure are given. Draw the figure and its image after a dilation with the given scale factor. Identify the type of dilation.</p> <p>27. $P(-3, -2), Q(-3, 0), R(0, 0); k = 4$</p> <p>28. $B(3, 3), C(3, 6), D(6, 6), E(6, 3); k = \frac{1}{3}$</p> <p>29. The vertices of a rectangle are $Q(-6, 2), R(6, 2), S(6, -4),$ and $T(-6, -4)$. Dilate the rectangle with respect to the origin using a scale factor of $\frac{3}{2}$. Then translate it 5 units right and 1 unit down. What are the coordinates of the image?</p>	<p>8.G.3, 8.G.4 QUIZ</p>								

Classroom-Based Instruction Week at a Glance

Week 7: Angles and Triangles



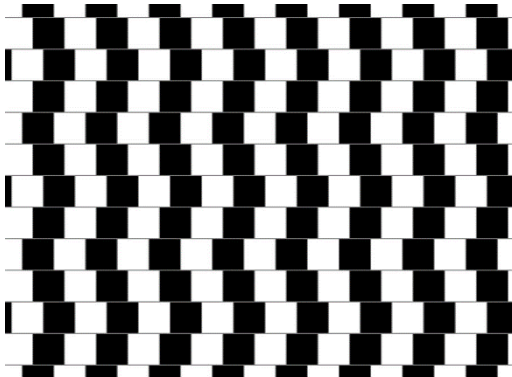
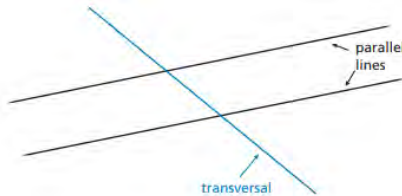
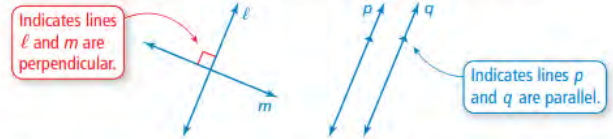
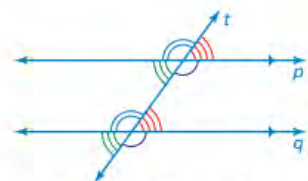
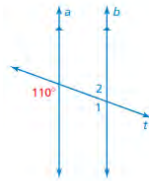
8.G.5 Use informal arguments to establish facts about the angles created when parallel lines are cut by a transversal, and the angle-angle criterion for similarity of triangles.

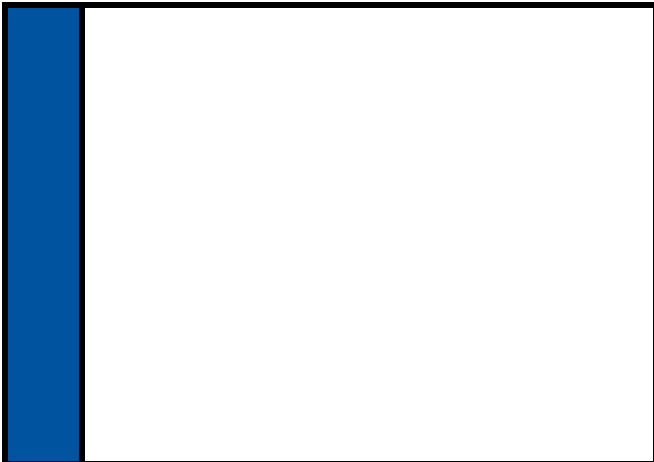
Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Small Group Instruction		
		35-45 minutes	10-15 minutes	30-45 minutes		
		Lesson Cycle: Engage – Problem – Discussion – Key Points	At least 2 aligned problems	Independent Practice Problem Sets	Collaborative Problem Sets	Teacher Small Group
Day 1: BI Lesson 3.1: Parallel Lines and Transversals I can define parallel lines, perpendicular lines, and a transversal. I can identify the angles formed when parallel lines are cut by a transversal. I can find the measures of angles formed when parallel lines are cut by a transversal		3.1 Angles Pg. 102-106 Problem: Pg. 102-103 Activity 1 and 2 Discussion: What is true about parallel lines? Which angles in Activity 1 have equal measures and how do you know? Key Point: Example 1 & 2	Pg. 104-105 "On Your Own" # 1-3	Pg. 107 # 3-12	Pg. 108 #13-14	Pg. 107 #1-2
Day 2: : Lesson 3.1: Parallel Lines and Transversals I can find the measures of angles formed when parallel lines are cut by a transversal. I can use corresponding angles to find angle measures. I can identify interior and exterior angles.		3.1 Angles Pg. 102-106 Problem: Activity 3 Discussion: Is it possible to find unknown angles without a protractor? Key Point: Example 3 & 4	Pg. 106 "On Your Own" # 4-7	Pg. 108 #15-26	Pg. 109 #27-30	Mini-Assessment Pg. T-109
Day 3: BI Lesson I can understand that the sum of the interior angle measures of a triangle is 180° . I can find the measures of interior and exterior angles of triangles.		3.2 Interior angles Pg. 110 Problem: Activity 1 & 2 Discussion: How can you describe the relationship among the angles in a triangle? Key Point: Key Idea & Example 1	Pg. 112 "On Your Own" #1-2	Pg. 114 # 4-11	NA	Pg. 114 # 1-3

<p>Day 4: BI Lesson 3.2: Angles of Triangles I can understand that the sum of the interior angle measures of a triangle is 180°.</p> <p>I can find the measures of interior and exterior angles of triangles.</p>	<p>3.2 Exterior angles Problem: Pg. 111 Activity 3 and 4 Discussion: <i>What do you notice about the exterior angles of a triangle? Are they at all related to the interior angles?</i> Key Point: Example 2 & 3</p>	Pg. 113 "On You Own" #3-5	Pg. 115 #12-18	#19-22	Teacher choice based on student need
<p>Day 5: BI Lesson 3.2: Angles of Triangles I can assess my understanding of parallel lines, transversals and finding unknown interior and exterior angles in a triangle.</p>	Pg. T-115 Mini-Assessment Review	8.G.5 QUIZ			

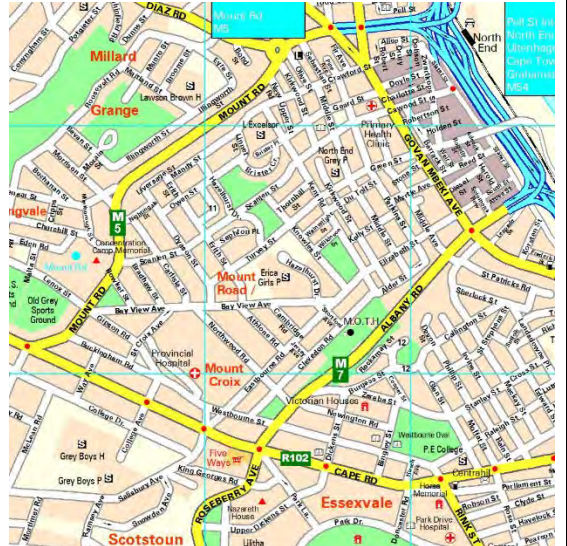
Introduction to New Material

Week 7: Transversals, Parallel Lines, and Triangles

Day	Engage	Problem	Key Ideas
1	<p>Show:</p>  <p>(Believe it or not, these lines are all parallel!)</p> <p>Ask: What do you notice? What do you wonder?</p>	<p><i>BI 2.1 Transversals & Parallel lines</i> <i>PG.102-106</i></p> <p>Problem: Pg. 102-103 Activity 1 and 2 <i>Note: Students will need rulers</i></p> <ol style="list-style-type: none"> Discuss what it means for two lines to be parallel. Decide on a strategy for drawing two parallel lines, then draw the two parallel lines. <ul style="list-style-type: none"> *Looking for two lines that as the same distance, so they will never intersect/touch. Now, draw a third line that intersects the two parallel lines. This third line is called a Transversal.  <p>EX:</p> <p>Discussion:</p> <ol style="list-style-type: none"> How many angles are formed when the parallel lines are intersected by the transversal? Which angles in Activity 1 have equal measures and how do you know? 	<p>BI pg. 104-105 Key vocabulary, Key ideas & Example 1 and Example 2.</p> <p>Review past vocab: supplementary, complementary, vertical angles</p> <p>Key Vocab:</p> <ul style="list-style-type: none"> Transversal Corresponding angles Interior and exterior angles <p>Lines in the same plane that do not intersect are called <i>parallel lines</i>. Lines that intersect at right angles are called <i>perpendicular lines</i>.</p>  <p>A line that intersects two or more lines is called a transversal. When parallel lines are cut by a transversal, several pairs of congruent angles are formed.</p> <p>Corresponding Angles</p> <p>When a transversal intersects parallel lines, corresponding angles are congruent.</p>  <p>Corresponding angles</p> <p>Use the figure to find the measures of (a) $\angle 1$ and (b) $\angle 2$.</p> <ol style="list-style-type: none"> $\angle 1$ and the 110° angle are corresponding angles. They are congruent. <ul style="list-style-type: none"> So, the measure of $\angle 1$ is 110°. $\angle 1$ and $\angle 2$ are supplementary. <ul style="list-style-type: none"> $\angle 1 + \angle 2 = 180^\circ$ (Definition of supplementary angles) $110^\circ + \angle 2 = 180^\circ$ (Substitute 110° for $\angle 1$.) $\angle 2 = 70^\circ$ (Subtract 110° from each side.) So, the measure of $\angle 2$ is 70°. 



Show:



(Or any picture that shows the top view of intersecting streets)

Ask:

What do you notice? What do you wonder?

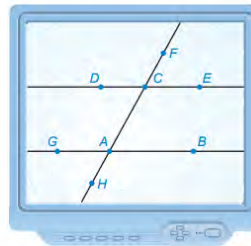
3.1 Angles BI Pg. 102-106

Problem: Activity 3

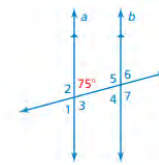
Note: Students will need rulers and protractors. Students may need a reminder on how to use a protractor before beginning that activity.

Work with a partner. Use geometry software to draw two parallel lines intersected by a transversal.

- Find all the angle measures.
- Adjust the figure by moving the parallel lines or the transversal to a different position. Describe how the angle measures and relationships change.

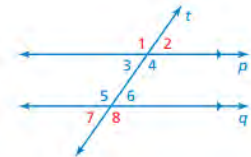


Discussion: Is it possible to find unknown angles without a protractor? Explain...

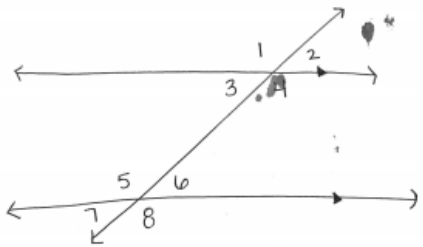
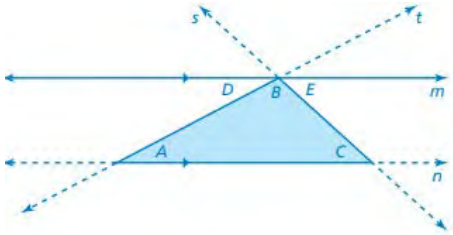
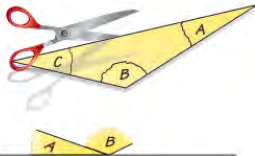


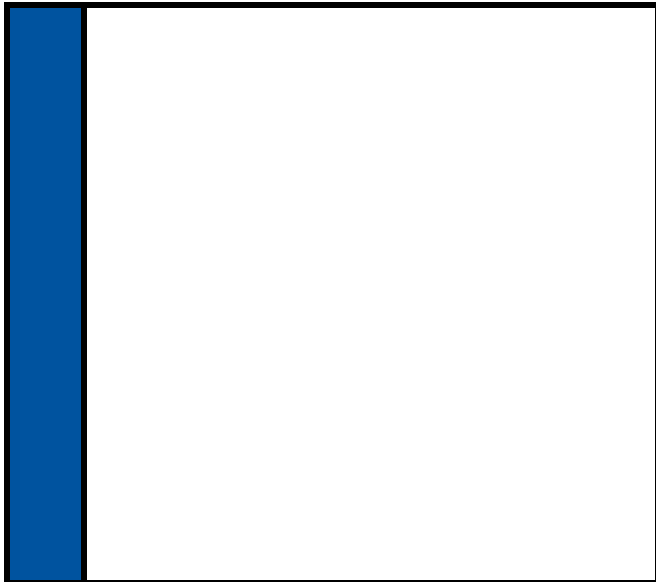
Use the figure to find the measures of the numbered angles.
 $\angle 1$: $\angle 1$ and the 75° angle are vertical angles. They are congruent.
 So, the measure of $\angle 1$ is 75° .
 $\angle 2$ and $\angle 3$: The 75° angle is supplementary to both $\angle 2$ and $\angle 3$.
 $75^\circ + \angle 2 = 180^\circ$ Definition of supplementary angles
 $\angle 2 = 105^\circ$ Subtract 75° from each side.
 So, the measures of $\angle 2$ and $\angle 3$ are 105° .
 $\angle 4, \angle 5, \angle 6,$ and $\angle 7$: Using corresponding angles, the measures of $\angle 4$ and $\angle 6$ are 75° , and the measures of $\angle 5$ and $\angle 7$ are 105° .

When two parallel lines are cut by a transversal, four **interior angles** are formed on the inside of the parallel lines and four **exterior angles** are formed on the outside of the parallel lines.

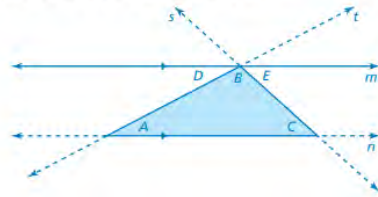


$\angle 3, \angle 4, \angle 5,$ and $\angle 6$ are interior angles.
 $\angle 1, \angle 2, \angle 7,$ and $\angle 8$ are exterior angles.

			<div data-bbox="1339 115 1948 889"> <p>EX 3 Parallel Lines + Transversals</p>  <p><u>Corresponding Angles</u>: an angle from 1 line that corresponds w/ the same \angle from the other line. (They are congruent)</p> <p>$\angle 1 = \angle 5$ $\angle 3 = \angle 7$ $\angle 2 = \angle 6$ $\angle 4 = \angle 8$</p> <p><u>Alternate Interior \angle</u>: opposite \angle on the inside of the // lines are =.</p> <p>opposite $\angle 3 = \angle 6$ $\angle 5 = \angle 4$</p> <p><u>Alternate Exterior</u>: opposite \angle on the outside of the // lines are =.</p> <p>$\angle 1 = \angle 8$ $\angle 7 = \angle 2$</p> </div>
<p>3</p>	<p>Show:</p>  <p>The goal is to investigate and recall triangles and features of triangles.</p> <p>Ask: What do you notice? What do you wonder?</p>	<p>Bl p.110 Activity 1 Students will need paper and scissors.</p> <p>Work with a partner.</p> <ol style="list-style-type: none"> Draw a triangle. Label the interior angles A, B, and C. Carefully cut out the triangle. Tear off the three corners of the triangle. Arrange angles A and B so that they share a vertex and are adjacent. How can you place the third angle to determine the sum of the measures of the interior angles? What is the sum? Compare your results with those of others in your class. STRUCTURE How does your result in part (d) compare to the rule you wrote in Lesson 1.1, Activity 2?  <p>Activity 2</p>	<p>Bl p. 112 Example 1 and key ideas Review types of angles and types of triangles</p> <ul style="list-style-type: none"> Right, obtuse, acute Scalene, equilateral, isosceles.



- a. Describe the figure.
 b. **LOGIC** Use what you know about parallel lines and transversals to justify your result in part (d) of Activity 1.



Discussion: How can you describe the relationship among the angles in a triangle?

Note: ALL Triangles have 180° ALWAYS!

* Interior Angles: The angles on the inside of a triangle (polygon).

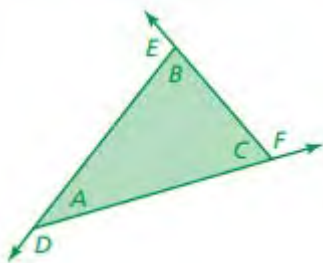
$a + b + c = 180^\circ$

a) $32 + 48 + x = 180$
 $x + 80 = 180$
 $-80 \quad -80$
 $m\angle x = 100^\circ$

b) $x + 28 + x + 90 = 180$
 $2x + 118 = 180$
 $2x = 62$
 $x = 31^\circ$

$m\angle A = 59^\circ$
 $m\angle B = 90$
 $m\angle C = 31^\circ$

Show:



Ask:

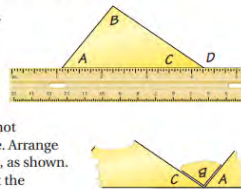
4 What do you notice? What do you wonder?

Bl p. 111-113 **3.2 Exterior angles**
Problem: Pg. 111 Activity 3 and 4
 Exploring and measuring EXTERIOR angles.

Activity 3:

Work with a partner.

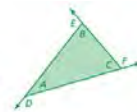
- Draw a triangle. Label the interior angles A, B, and C.
- Carefully cut out the triangle.
- Place the triangle on a piece of paper and extend one side to form exterior angle D, as shown.
- Tear off the corners that are not adjacent to the exterior angle. Arrange them to fill the exterior angle, as shown. What does this tell you about the measure of exterior angle D?



Activity 4

Work with a partner.

- Draw a triangle and label the interior and exterior angles, as shown.
- Use a protractor to measure all six angles. Copy and complete the table to organize your results. What does the table tell you about the measure of an exterior angle of a triangle?



Exterior Angle	D = $^\circ$	E = $^\circ$	F = $^\circ$
Interior Angle	B = $^\circ$	A = $^\circ$	A = $^\circ$
Interior Angle	C = $^\circ$	C = $^\circ$	B = $^\circ$

Discussion: What do you notice about the exterior angles of a triangle? Are they at all related to the interior angles?






Bl p. Pg. 112 (Exterior angles)
 Key Idea & Example 2 and 3

Exterior: When lines of a triangle are extended it creates angles on the outside of a shape, called exterior angles.

2 Ways:

1) Find x.
 1) Find the interior \angle .
 $36 + 72 + y = 180$
 $108 + y = 180$
 $y = 72^\circ$
 if $y = 72^\circ$, $x + y$ are supplementary so $180 = 72 + x$
 $x = 108^\circ$

2nd way
 The measure of an exterior \angle = the 2 non adjacent angles added together.
 $36 + 72 = x$
 $x = 108^\circ$



5	<p>Show:</p> <p>Mini-Assessment Find the value of x.</p> <p>1. </p> <p>63</p> <p>2. </p> <p>60</p> <p>3. </p> <p>30</p> <p>Find the measure of the exterior angle.</p> <p>4. </p> <p>141°</p> <p>5. </p> <p>Ask: What do you notice? What do you wonder?</p>		<p>8.G.5 QUIZ</p>
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Classroom-Based Instruction Week at a Glance

Week 8: Angles of Polygons and Using Similar Triangles



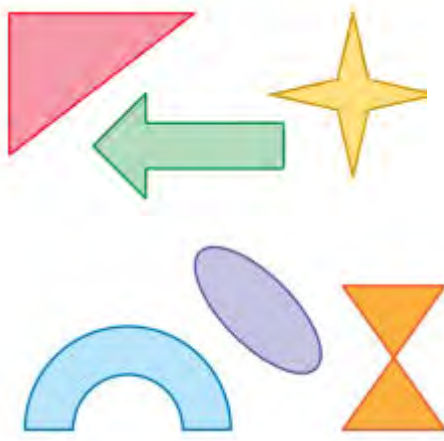




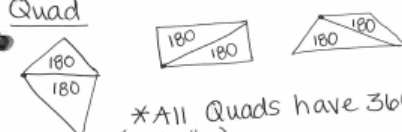

8.G.5 Use informal arguments to establish facts about the angles created when parallel lines are cut by a transversal, and the angle-angle criterion for similarity of triangles

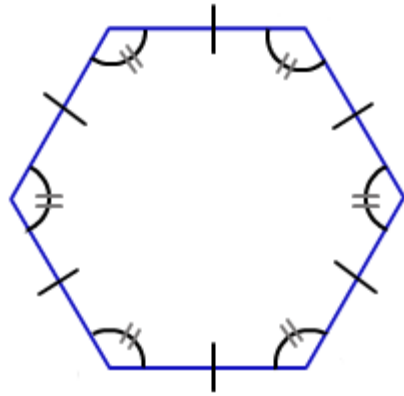
Daily Goals and Lesson Objectives		Introduction to New Material	Guided Practice	Small Group Instruction		
		35-45 minutes	10-15 minutes	30-45 minutes		
		Lesson Cycle: Engage – Problem – Discussion – Key Points	At least 2 aligned problems	Independent Practice Problem Sets	Collaborative Problem Sets	Teacher Small Group
Day 1: BI Lesson 3.3: Angles of Polygons I can find the sum of the interior angle measures of polygons. I can understand that the sum of the exterior angle measures of a polygon is 360° . I can find the measures of interior and exterior angles of polygons.		3.3 Pg. 118 Problem: <i>Activity 1 & Discussion: How do you find the sum of the interior angles of any given polygon?</i> Key Point: Example 1 & 2	Pg. 120 “On Your Own” # 1-5	pg. 123 #4-14	pg. 123 #30-31	pg. 123 #1-3
Day 2: BI Lesson 3.3: Angles of Polygons I can find the sum of the interior angle measures of polygons. I can understand that the sum of the exterior angle measures of a polygon is 360° . I can find the measures of interior and exterior angles of polygons.		3.3 Pg. 121 Problem: <i>Example 3 Discussion: What is true about all regular polygons? How does being a regular polygon effect the interior angle measures?</i> Key Point: Example 4	Pg. 122 “On Your Own” # 6-9	pg. 124 #'s 15-24	#26-29, 32	Resources by Chapter Practice A or B
Day 3: BI Lesson 3.4: Using Similar Triangles I can understand the concept of similar triangles. I can identify similar triangles. I can use indirect measurement to find missing measures		3.4 Pg. 126 Problem: <i>Activity 2 Discussion: How can you use angles to tell whether triangles are similar?</i> Key Point: Example 1	Pg. 129 “On Your Own” # 1-2 and Pg. 130 # 4-5	Pg. 130 # 6-10	N/A	Resources by Chapter Practice A or B

<p>Day 4: BI Lesson 3.4: Using Similar Triangles I can understand the concept of similar triangles. I can identify similar triangles. I can use indirect measurement to find missing measures</p>	<p>3.4 Pg. 129 Problem: <i>Example 2</i> Discussion: How can you use similar triangles to find unknown lengths? Key Point: Key vocab & Example 2</p>	<p>Pg. 129 "On Your Own" # 3</p>	<p>pg. 131 # 11-15</p>	<p>Pg. 131 #17, Pg. 132 #10-11</p>	<p>Resources by Chapter Practice A or B</p>
<p>Day 5: BI Lesson</p>	<p>Whiteboard Review Pg. 132 3.3-3.4 Mixed Review Quiz</p>	<p>8.G.5 QUIZ</p>			

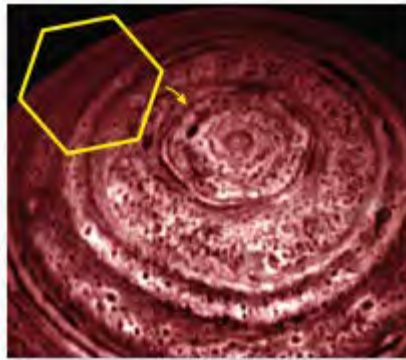
Introduction to New Material

Week 8: Angles of Polygons and Using Similar Triangles

Day	Engage	Problem	Key Ideas
1	<p>Show:</p>  <p>Ask: What do you notice? What do you wonder?</p>	<p>BI p. 3.3 [Pg. 118] Problem: Activity 1 a-f Work with a partner. In parts (a)–(e), identify each polygon and the number of sides n. Then find the sum of the interior angle measures of the polygon.</p> <p>a. Polygon: Number of sides: $n =$ </p> <p>Draw a line segment on the figure that divides it into two triangles. Is there more than one way to do this? Explain. What is the sum of the interior angle measures of each triangle? What is the sum of the interior angle measures of the figure?</p> <p>b.  c. </p> <p>d.  e. </p> <p>Discussion: How do you find the sum of the interior angles of any given polygon?</p>	<p>BI p.120 Key Idea Interior angle measures & Example 1 and 2</p> <div style="border: 1px solid black; padding: 5px;"> <p>EX1 Sum of angle measures.</p> <p>Quad  = 360°</p> <p>*All Quads have 360° (Activity) * use Triangles to determine sum of Angles (# of sides - 2) \cdot 180 = total angles $(n-2) \cdot 180$</p> <p>① Pentagon $(5-2) \cdot 180 = 540^\circ$ ② Octagon $(8-2) \cdot 180 = 1080^\circ$ ③ 25-gon $(25-2) \cdot 180 = 4140^\circ$</p> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>EX2 Find unknown (interior) Angle measures.</p> <p> 7 sides</p> <p>① Find total (sides-2) \cdot 180 $(7-2) \cdot 180 = 900$</p> <p>② set up equation $140 + 145 + 115 + 120 + 130 + 125 + x = 900$ $778 + x = 900$ $x = 122^\circ$</p> <p>$m\angle x = 122^\circ$</p> </div>
2	<p>Show:</p>	<p>BI p. 3.3 [Pg. 121] Problem: Example 3 Note: Review Regular Polygons before Example 3: A cloud system discovered on Saturn is in the approximate shape of a regular hexagon. Can you find the measure of each interior angle of the regular hexagon?</p>	<p>BI.Pg. 122 Key Idea (Exterior angle measures) and Example 4</p> <p>Key Vocab:</p> <ul style="list-style-type: none"> • Regular Polygon • Exterior angles • Concave • Convex



Ask:
What do you notice? What do you wonder?



The hexagon is about 15,000 miles across. Approximately four Earths could fit inside it.

Discussion: What is true about all regular polygons? How does being a regular polygon effect the interior angle measures?

* Regular Polygon: All angles have the same measure and all sides are = in length.

3 4 5 6 8 12-gon
 equilateral triangle square pentagon hexagon octagon

* Seven sides = septagon heptagon * 10 = Decagon
 * concave vs. convex

[Ex3] Regular Polygons (all ang are the same)

$$\frac{(\text{Sides} - 2) \cdot 180}{\# \text{ of sides}}$$
 Find the interior ang. measure of a regular hexagon.

$$\frac{(6-2) \cdot 180}{6} = 720 = \text{total}$$

$$\frac{720}{6} = 120^\circ \text{ each angle.}$$

[Ex4] Exterior Angle Measures

The sum of the exterior angles of ALL convex polygons is 360° !

$$x + 50 + 127 + 91 = 360$$

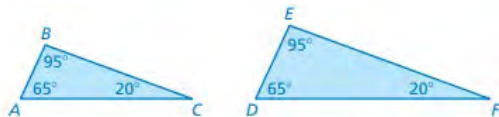
$$x + 268 = 360$$

$$- 268 \quad - 268$$

$$\boxed{x = 92^\circ}$$

3

Show:

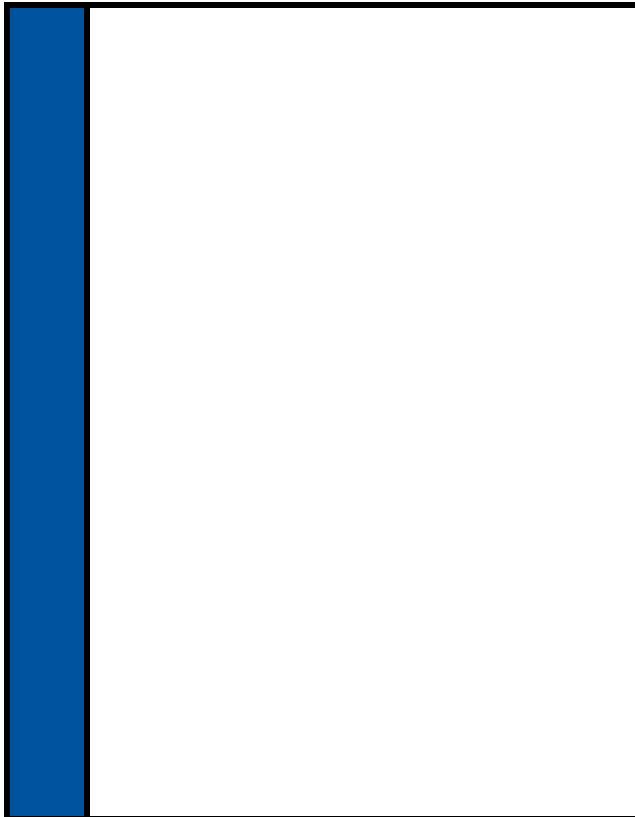


Ask:
What do you notice? What do you wonder?

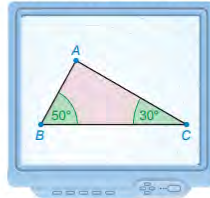
BI p.126 **3.4 Similar Triangles**
(Need Geometry Software)

Problem: Activity 2

BI p. 128 Key Idea Similar Triangles & Example 1



Work with a partner. Use geometry software to draw the triangle below.



- Dilate the triangle by the following scale factors.
 2 $\frac{1}{2}$ $\frac{1}{4}$ 2.5
- Measure the third angle in each triangle. What do you notice?
- REASONING** You have two triangles. Two angles in the first triangle are congruent to two angles in the second triangle. Can you conclude that the triangles are similar? Explain.

Discussion: How can you use angles to tell whether triangles are similar?

3.4 Similar Triangles (Angles)

* Similar Triangles have the same angle measures! (sides are proportional)

EX1 Identifying similar triangles by \angle 's.

1) Explain... Note: if 2 Δ have 2 pairs of congruent \angle 's, then the 3rd angles are =.

$50 + 75 + x = 180$
 $x = 55^\circ$

$50 + 75 + x = 180$
 $x = 55^\circ$

2.) Are they similar?

$x + 54 + 63 = 180$
 $x + 117 = 180$
 $x = 63^\circ$
 $63, 63, 54 = 63, 63, 54$ **Yes!**

$63 + 63 + y = 180$
 $126 + y = 180$
 $y = 54^\circ$

3) Are we similar? prove it...

4

Show:

Ask:
What do you notice? What do you wonder?

3.4 [Pg. 129]
 BI p. 127 Indirect measurement
Problem: Activity 2
 You plan to cross a river and want to know how far it is to the other side. You take measurements on your side of the river and make the drawing shown. (a) Explain why $\triangle ABC$ and $\triangle DEC$ are similar. (b) What is the distance x across the river?

BI p. key vocab & Example 2
 Vocab:

- Indirect Measurement



NOTES:

- a. $\angle B$ and $\angle E$ are right angles, so they are congruent. $\angle ACB$ and $\angle DCE$ are vertical angles, so they are congruent.

Because two angles in $\triangle ABC$ are congruent to two angles in $\triangle DEC$, the third angles are also congruent and the triangles are similar.

- b. The ratios of the corresponding side lengths in similar triangles are equal. Write and solve a proportion to find x .

$\frac{x}{60} = \frac{40}{50}$ Write a proportion.

$60 \cdot \frac{x}{60} = 60 \cdot \frac{40}{50}$ Multiplication Property of Equality

$x = 48$ Simplify.

So, the distance across the river is 48 feet.

Discussion: How can you use similar triangles to find unknown lengths?

***Indirect Measurement:** When you use similar figures to find missing measurements because it is too difficult to find directly.

EX2 Using Indirect Measurements

You plan to cross a river and want to know how far it is to the other side. You take measurements on land & use that to estimate the distance across the river. Explain why $\triangle ABC$ and $\triangle DEC$ are similar, then find the distance across the river.

Note: When 2 \triangle are similar the sides are proportional
 $BA \sim ED$ so, $\frac{60}{x} \sim \frac{50}{40}$
 $BC \sim EC$

$\frac{60}{x} = \frac{50}{40}$, Fish!
 $x = 48 \text{ ft}$

because C is the same on both \triangle the 3^{rd} Angle must be the same, therefore, they are similar!

$\triangle ABC$
 $\angle A = \angle D =$
 $\angle B = 90$ $\angle E = 90$
 $\angle C = \text{same}$ $\angle C = \text{same}$
 as $\quad \quad \quad$ as
 Vertical angles



Appendix C: 9-12 Core Content Electives

Oak Grove Charter Academy

Appendix C: 9-12 Core Content Electives

Oak Grove Charter Academy will offer grades K-8. This section is not applicable.



Appendix D: Yearly Academic Calendar

Oak Grove Charter Academy

Oak Grove Charter Academy

SAMPLE 2021-22 School Year SAMPLE

August						
S	M	T	W	T	F	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Mid-Late July: Principals Meeting, Leadership Summit, New Teacher Orientation - Grand Rapids, MI

12th Staff PD; 13th Regional PD
16th-20th Staff PD; 18th Open House
23rd First Day of School

February						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

14th Presidents Day

September						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

6th Labor Day
15th Early Release, Staff PD

24th End of Quarter 3; 25th Teacher Workday

March						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

9th Early Release, Staff PD

October						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

13th Teacher Workday
25th End of Quarter 1

4th-7th PT Conferences; 8th Staff PD
11th-15th Spring Break
18th School Resumes
25th Regional PD

April						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

November						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

1st-5th PT Conferences
11th Veteran's Day; 12th Staff PD
24th-26th Thanksgiving Break
29th School Resumes

30th Memorial Day

May						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

December						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

20th-Jan 2nd Winter Break

10th Last Day of School; End of Quarter 4
13th Staff PD




June						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

January						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

1st New Year's Day
3rd School Resumes
14th End of Quarter 2
17th MLK Day; 18th Teacher Workday

4th Independence Day

July						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

 Students Do Not Report/ Staff Report All Day
 Students Report Half Day/ Staff Report All Day
 Students/ Staff Do Not Report

Last Update: 8/6/2019
180 School Days
1,110 School Hours
TBD (half)

Board Approved:



Appendix E: Daily and Weekly Schedule for Each Grade Band the School Will Ultimately Serve

Oak Grove Charter Academy

OAK GROVE CHARTER ACADEMY
MASTER SCHEDULE

Start - End	Kinder.	Grade 1	Grade 2	Grade 3	Grade 4			Grade 5		
8:00 AM - 8:05 AM										
8:05 AM - 8:10 AM										
8:10 AM - 8:15 AM	HR Moral Focus (20 mins)	HR Moral Focus (20 mins)	HR Moral Focus (20 mins)	HR Moral Focus (20 mins)				HR Moral Focus (15 mins)	HR Moral Focus (15 mins)	HR Moral Focus (15 mins)
8:15 AM - 8:20 AM										
8:20 AM - 8:25 AM										
8:25 AM - 8:30 AM	READ ALOUD	READ ALOUD	READ ALOUD	READ ALOUD				SPECIALS 30 mins	SPECIALS 30 mins	SPECIALS 30 mins
8:30 AM - 8:35 AM										
8:35 AM - 8:40 AM										
8:40 AM - 8:45 AM					ELA (90)	Math (90)	Sci/SS (90)	Transition	Transition	Transition
8:45 AM - 8:50 AM										
8:50 AM - 8:55 AM										
8:55 AM - 9:00 AM										
9:00 AM - 9:05 AM										
9:05 AM - 9:10 AM										
9:10 AM - 9:15 AM										
9:15 AM - 9:20 AM										
9:20 AM - 9:25 AM										
9:25 AM - 9:30 AM										
9:30 AM - 9:35 AM										
9:35 AM - 9:40 AM										
9:40 AM - 9:45 AM										
9:45 AM - 9:50 AM										
9:50 AM - 9:55 AM										
9:55 AM - 10:00 AM										
10:00 AM - 10:05 AM										
10:05 AM - 10:10 AM										
10:10 AM - 10:15 AM										
10:15 AM - 10:20 AM										
10:20 AM - 10:25 AM										
10:25 AM - 10:30 AM										
10:30 AM - 10:35 AM										
10:35 AM - 10:40 AM										
10:40 AM - 10:45 AM										
10:45 AM - 10:50 AM										
10:50 AM - 10:55 AM										
10:55 AM - 11:00 AM										
11:00 AM - 11:05 AM										
11:05 AM - 11:10 AM	Lunch (25 mins)	Math 90 mins	Math 95 mins							
11:10 AM - 11:15 AM										
11:15 AM - 11:20 AM	CULTURE									
11:20 AM - 11:25 AM	Transition									
11:25 AM - 11:30 AM										
11:30 AM - 11:35 AM	RECESS	Lunch (20 mins)								
11:35 AM - 11:40 AM										
11:40 AM - 11:45 AM										
11:45 AM - 11:50 AM										
11:50 AM - 11:55 AM										
11:55 AM - 12:00 PM										
12:00 PM - 12:05 PM										
12:05 PM - 12:10 PM										
12:10 PM - 12:15 PM										
12:15 PM - 12:20 PM										
12:20 PM - 12:25 PM										
12:25 PM - 12:30 PM										
12:30 PM - 12:35 PM										
12:35 PM - 12:40 PM										
12:40 PM - 12:45 PM										
12:45 PM - 12:50 PM										
12:50 PM - 12:55 PM										
12:55 PM - 1:00 PM										
1:00 PM - 1:05 PM										
1:05 PM - 1:10 PM										
1:10 PM - 1:15 PM										
1:15 PM - 1:20 PM										
1:20 PM - 1:25 PM										
1:25 PM - 1:30 PM										
1:30 PM - 1:35 PM	Science/SS 80 mins	SPECIALS 30 mins								
1:35 PM - 1:40 PM										
1:40 PM - 1:45 PM										
1:45 PM - 1:50 PM										
1:50 PM - 1:55 PM										
1:55 PM - 2:00 PM										
2:00 PM - 2:05 PM										
2:05 PM - 2:10 PM	SPECIALS 35 mins									
2:10 PM - 2:15 PM										
2:15 PM - 2:20 PM										
2:20 PM - 2:25 PM										
2:25 PM - 2:30 PM										
2:30 PM - 2:35 PM	Transition									
2:35 PM - 2:40 PM										
2:40 PM - 2:45 PM										
2:45 PM - 2:50 PM										
2:50 PM - 2:55 PM										
2:55 PM - 3:00 PM										
3:00 PM - 3:05 PM										
3:05 PM - 3:10 PM										
3:10 PM - 3:15 PM										
3:15 PM - 3:20 PM										
3:20 PM - 3:25 PM										
3:25 PM - 3:30 PM										

OAK GROVE CHARTER ACADEMY
MASTER SCHEDULE

Start - End	Grade 6			Grade 7			Grade 8		
8:00 AM - 8:05 AM									
8:05 AM - 8:10 AM									
8:10 AM - 8:15 AM									
8:15 AM - 8:20 AM									
8:20 AM - 8:25 AM									
8:25 AM - 8:30 AM									
8:30 AM - 8:35 AM									
8:35 AM - 8:40 AM	HR Moral Focus (20 mins)	HR Moral Focus (20 mins)	HR Moral Focus (20 mins)	HR Moral Focus (20 mins)	HR Moral Focus (20 mins)	HR Moral Focus (20 mins)	HR Moral Focus (20 mins)	HR Moral Focus (20 mins)	
8:40 AM - 8:45 AM									
8:45 AM - 8:50 AM									
8:50 AM - 8:55 AM									
8:55 AM - 9:00 AM									
9:00 AM - 9:05 AM	Elective #1 (30 mins)	Elective #1 (30 mins)	Elective #1 (30 mins)	Elective #1 (30 mins)	Elective #1 (30 mins)	Elective #1 (30 mins)	Elective #1 (30 mins)	Elective #1 (30 mins)	
9:05 AM - 9:10 AM									
9:10 AM - 9:15 AM									
9:15 AM - 9:20 AM									
9:20 AM - 9:25 AM	Transition	Transition	Transition	Transition	Transition	Transition	Transition	Transition	
9:25 AM - 9:30 AM									
9:30 AM - 9:35 AM	Elective #2 (30 mins)	Elective #2 (30 mins)	Elective #2 (30 mins)	Elective #2 (30 mins)	Elective #2 (30 mins)	Elective #2 (30 mins)	Elective #2 (30 mins)	Elective #2 (30 mins)	
9:35 AM - 9:40 AM									
9:40 AM - 9:45 AM									
9:45 AM - 9:50 AM									
9:50 AM - 9:55 AM									
9:55 AM - 10:00 AM	Transition	Transition	Transition	Transition	Transition	Transition	Transition	Transition	
10:00 AM - 10:05 AM									
10:05 AM - 10:10 AM									
10:10 AM - 10:15 AM									
10:15 AM - 10:20 AM									
10:20 AM - 10:25 AM									
10:25 AM - 10:30 AM									
10:30 AM - 10:35 AM									
10:35 AM - 10:40 AM									
10:40 AM - 10:45 AM	ELA 100 Mins	Math 100 mins	Science/SS 100 mins	ELA 95 mins	Math 95 mins	Sci/SS 95 mins	ELA 95 mins	Math 95 mins	
10:45 AM - 10:50 AM									
10:50 AM - 10:55 AM									
10:55 AM - 11:00 AM									
11:00 AM - 11:05 AM									
11:05 AM - 11:10 AM									
11:10 AM - 11:15 AM									
11:15 AM - 11:20 AM									
11:20 AM - 11:25 AM									
11:25 AM - 11:30 AM									
11:30 AM - 11:35 AM									
11:35 AM - 11:40 AM									
11:40 AM - 11:45 AM	Transition	Transition	Transition	Transition	Transition	Transition	Transition	Transition	
11:45 AM - 11:50 AM									
11:50 AM - 11:55 AM									
11:55 AM - 12:00 PM									
12:00 PM - 12:05 PM	Math 90 mins	Science/SS 90 mins	ELA 90 mins	Math 100 mins	Sci/SS 100 mins	ELA 100 mins	Math 90 mins	Sci/SS 90 mins	
12:05 PM - 12:10 PM									
12:10 PM - 12:15 PM									
12:15 PM - 12:20 PM									
12:20 PM - 12:25 PM									
12:25 PM - 12:30 PM									
12:30 PM - 12:35 PM									
12:35 PM - 12:40 PM	Lunch (25 mins)	Lunch (25 mins)	Lunch (25 mins)	Lunch (25 mins)	Lunch (25 mins)	Lunch (25 mins)	Lunch (25 mins)	Lunch (25 mins)	
12:40 PM - 12:45 PM									
12:45 PM - 12:50 PM									
12:50 PM - 12:55 PM									
12:55 PM - 1:00 PM	Transition	Transition	Transition	Transition	Transition	Transition	Transition	Transition	
1:00 PM - 1:05 PM									
1:05 PM - 1:10 PM									
1:10 PM - 1:15 PM									
1:15 PM - 1:20 PM									
1:20 PM - 1:25 PM									
1:25 PM - 1:30 PM									
1:30 PM - 1:35 PM									
1:35 PM - 1:40 PM									
1:40 PM - 1:45 PM							Transition	Transition	
1:45 PM - 1:50 PM									
1:50 PM - 1:55 PM									
1:55 PM - 2:00 PM									
2:00 PM - 2:05 PM									
2:05 PM - 2:10 PM									
2:10 PM - 2:15 PM									
2:15 PM - 2:20 PM									
2:20 PM - 2:25 PM									
2:25 PM - 2:30 PM									
2:30 PM - 2:35 PM	Sci/SS 100 mins	ELA 100 mins	Math 100 mins	Sci/SS 95 mins	ELA 95 mins	Math 95 mins	Sci/SS 105 mins	ELA 105 mins	
2:35 PM - 2:40 PM									
2:40 PM - 2:45 PM									
2:45 PM - 2:50 PM									
2:50 PM - 2:55 PM									
2:55 PM - 3:00 PM									
3:00 PM - 3:05 PM									
3:05 PM - 3:10 PM									
3:10 PM - 3:15 PM									
3:15 PM - 3:20 PM									
3:20 PM - 3:25 PM									
3:25 PM - 3:30 PM									
	DISMISSAL	DISMISSAL	DISMISSAL	DISMISSAL	DISMISSAL	DISMISSAL	DISMISSAL	DISMISSAL	



Appendix F: Federal Documentation of Tax-Exempt Status

Oak Grove Charter Academy

Appendix F: Federal Documentation of Tax-Exempt Status

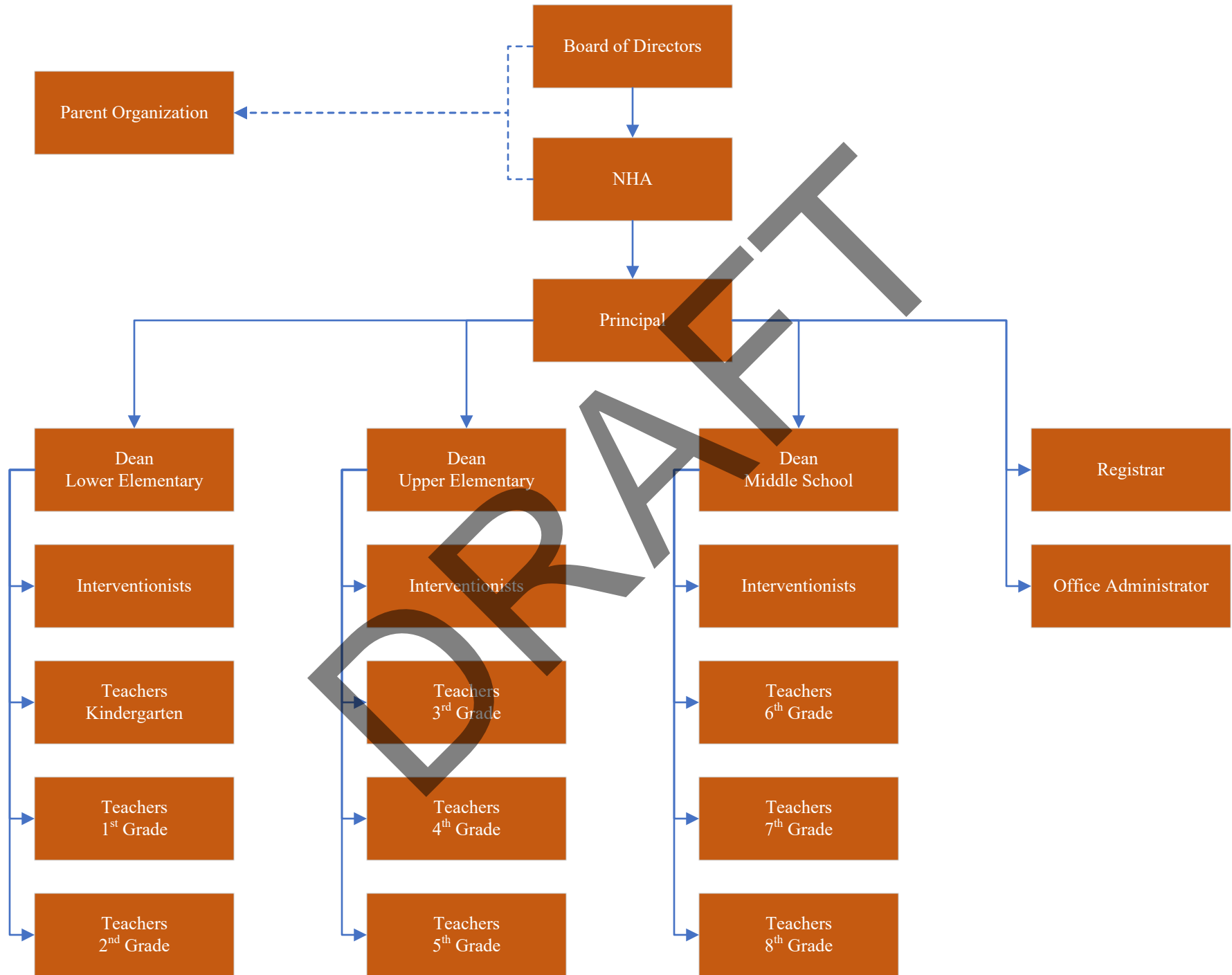
Oak Grove Charter Academy is seeking tax-exempt status from the Internal Revenue Service. We expect to secure this status within 24 months of the date the charter application receives final approval.



Appendix G: Organizational Chart

Oak Grove Charter Academy

Organizational Chart





Appendix H: Charter School Board Member Response and Resume

Oak Grove Charter Academy



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: Oak Grove Charter Academy

2. Full name: Gerald L. McNair

Home Address: 1198 Summerfield Lane East, Creedmoor, NC 27522

Business Name and Address: Alignment Health Inc, 2610 New Bern Ave, Raleigh, NC 27610

Telephone No.: 919.576.3337

E-mail address: gmlevon@yahoo.com

3. Brief educational and employment history.

I have a Master's Degree from Yale School of Public Health, New Haven, CT. I have worked for 5 years as an independent insurance agent for Alignment Healthcare, Inc in Raleigh, 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?

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 wasn't recruited, but I volunteered my time to be Chairman of the Board of Directors because I want to make a difference in the lives of future generations.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.



6. What is your understanding of the appropriate role of a public charter school board member?
Our role as members of the board of directors is to be outstanding citizens in our community, represent the educational needs of our students and families, and look for ways to expand educational resources for all of our students.

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 over seven years of progressive experience on the board of directors of two charter schools in Durham, NC. They are Healthy Start Academy and Research Triangle Charter Academy. I have been involved in interviewing and hiring of principals, deans, and teachers. In addition, I have been involved in new curriculum development, evaluating financial statements, analyzing suspension rates, reviewing evaluations for principals and teachers, and numerous other school related issues.

8. Describe the specific knowledge and experience that you would bring to the board.
As a member of the board of directors, I will bring knowledge of other charter schools that I have had direct experience with and my experience in management, financial management, and operations.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
Oak Grove Charter Academy exists to prepare students with the academic skills and character traits necessary for success in college, careers, and life.

2. What is your understanding of the school's proposed educational program?
Oak Grove will work in partnership with National Heritage Academies (NHA). NHA has seen great success at other schools using this educational program centered around four foundational pillars. The four pillars are: academic excellence, moral focus, student responsibility and parent partnership.

3. What do you believe to be the characteristics of a successful school?
Some of the key characteristics of a successful school is openness, honesty, love, understanding and forgiveness. A successful school may be a place for students to learn, make mistakes, grow and develop.

4. How will you know that the school is succeeding (or not) in its mission?
I will know that the school has succeeded in this mission when a majority of the students achieve a proficiency of B+ or greater in the school.

Governance

1. Describe the role that the board will play in the school's operation.
The board of directors has the fiduciary responsibility of managing the school. We will oversee and not micro-manage the principal and staff.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.



2. How will you know if the school is successful at the end of the first year of operation?
Achievement of success will be determined by goals and objectives that will be established by the principal and his/her team. The board of directors will review and approve those goals and objectives.
3. How will you know at the end of five years of the schools is successful?
Achievement of success at the end of five years will be determined by setting 5 year goals and objectives for the school and monitoring the progress and giving annual feedback to the principal and staff.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
We will conduct an annual review of the board of directors' effectiveness by engaging a consultant to review the Board's performance.
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?
When situations arise in which one or more BOD members acted unethical, the situation will be reviewed in closed session by the BOD and the Board members involved will be summarily dismissed.

*Please include the following with your Information Form

- a one page resume

*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, GERALD L. McNAIR 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 Oak Grove Charter Academy is true and correct in every respect.

A handwritten signature in black ink, appearing to read 'Gerald L. McNair', written over a horizontal line.

Signature

07/26/2019

Date

[Appendix I – Board Member Background Certification Statement and Completed Background Check*](#)

Gerald L. McNair, MPH

Permanent Address: 1198 Summerfield Lane, East, Creedmoor, NC
Cell number: (919) 612-2082 ~ Email: gmlevon@yahoo.com

VALUE STATEMENT

Accomplished Healthcare Professional with extensive experience leading people, building teams, improving and expanding healthcare programs, and providing consultative services for healthcare systems. Expertise in negotiating and securing managed care contracts, increasing operating revenues, and enhancing service utilization. Proven track record in the successful planning and direction of activities that improve all associated outcomes.

AREAS OF EXPERTISE

- | | |
|---------------------------------------|---|
| ~ Strategic and Operational Planning | ~ Presentations, Negotiations, and Deal Closing |
| ~ Relationship and Team Building | ~ Board of Directors RTCA and Healthy Start Academy (2009-2019) |
| ~ Decision Making and Problem Solving | ~ Managed Care and Post-Acute Networks |
| ~ Conducting Needs Assessments | ~ Quality and Performance Improvement |

CAREER PROGRESSION

Alignment Healthcare, Inc (June 2015-present)

Field Sales Representative

Responsible for growing Medicare business with major carriers in North Carolina including:

- Aetna Medicare Advantage products
- Humana Medicare Advantage products
- United Healthcare Medicare and Med. Supplement products
- Worked in Walmart Department Stores to grow Medicare membership
- Worked in primary care (providers offices to grow Medicare membership)

Sold prescription drug plans, Medicare Advantage, and Medicare Supplement plans to senior citizens. Achieved 10% expansion per year. Sold prescription drug plans, Medicare supplemental, and Medicare Advantage Plans.

Durham Regional Financial Center, Inc (May 2006-2015)

Sales Consultant

Responsible for brokering insurance products to Medicare Beneficiaries for a wide range of insurance companies, including: Cigna, United Health Care, Aetna, Coventry and other Medicare Insurance Companies. This project involved conducting sales seminars for Medicare beneficiaries; making sales presentations in their homes; to family members and influencers who were involved in the decision making process. Sales engagements were conducted from local pharmacies; primary care and specialty provider's offices as well as, within emergency rooms and select hospitals. The results of this effort led to a large growth in a Medicare book of business that were offered other products and services, for example, pharmacy coverage, life insurance, Long Term Care insurance coverage and health care supplemental coverage.

EDUCATION

Yale School of Public Health

Masters of Public Health (MPH)

Brandeis University

B.A in Economics

Health, Life, & Long term care Insurance Licenses

Additional references and details are available upon request.



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: Oak Grove Charter Academy
2. Full name: Robert David Fountain Jr.

Home Address: 1194 Atreus Lane, Creedmoor, NC 27522

Business Name and Address: Off the Grid Security Consultants

Telephone No.: 919. 464.9880

E-mail address: otgconsultant@gmail.com

3. Brief educational and employment history.
I have my associate's degree in Criminal Justice from Grambling State University. I served in the United States Marine Corps from 1986-1992, then worked for the Department of Public Safety from 1992-1995, from 1995- 1998 I worked as a Security Consultant, then worked as a Probation and Parole Coordinator for North Carolina from 1998-2018
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 was recruited by Gerald McNair to join this board. I wish to serve on this board because there is a lack of quality education for youth and poor test results. I believe charter schools

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.



are becoming more competitive to increase the development, character, structure and discipline of today's youth.

6. What is your understanding of the appropriate role of a public charter school board member? A public charter school board should give advice, counsel, exhibit the mission and vision of the school, develop policies, and assist in looking for qualified team member to provide education to our students.
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 not had previous experience serving on a charter school board, but I do have experience in education and working with at-risk youth. I taught internationally as an instructor on gang culture and was a general instructor working with at risk youth. I was also an instructor for homeland security. I have the ability to understand people, polices, be a team player and analyze data.
8. Describe the specific knowledge and experience that you would bring to the board.
I would bring my experience working for the Department of Public Safety where I assisted in developing a community program working with at-risk youth involved in gangs.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
Oak Grove Charter Academy exists to prepare students with the academic skills and character traits necessary for success in college, careers, and life.
2. What is your understanding of the school's proposed educational program?
In partnership with National Heritage Academies (NHA), they will provide the educational program that is centered on four foundational pillars. The four pillars are: academic excellence, moral focus, student responsibility, and parent partnership.
3. What do you believe to be the characteristics of a successful school?
A successful school is one that has great teamwork, leadership, and integrity.
4. How will you know that the school is succeeding (or not) in its mission?
When you observe students by sitting in the classroom, being present at the school and seeing the interaction between parents, students, staff and the principal that will show the schools success.

Governance

1. Describe the role that the board will play in the school's operation.
The board will assist with the following: curriculum development, oversight of the school, discipline on investigative issues, compliance, property management, safety and



security, ensuring mission and vision are met by administration and teachers at the school.

2. How will you know if the school is successful at the end of the first year of operation?
Walking into the school and seeing if we have a positive environment. Also, test scores and people wanting to come to our school.
3. How will you know at the end of five years of the schools is successful?
Reviewing analytical data will help us determine any changes. Data can include: test scores, enrollment, and parent satisfaction. We will continue to grow strategies that make us successful.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
As a board we will ensure the curriculum is being followed, students and staff adhere to the mission and vision, and taking due diligence to offer new resources for the school that will better educate our students.
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 believe in being open and transparent. If this situation were to happen, I would keep written document and share the questionable actions with the board and other leadership.

*Please include the following with your Information Form

- a one page resume

*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. [Click or tap here to enter text.](#)

Certification

I, Robert Fountain, 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 Oak Grove Charter Academy is true and correct in every respect.

A handwritten signature in black ink, appearing to read 'Robert Fountain'.

8/20/19

Signature

Date

[Appendix I – Board Member Background Certification Statement and Completed Background Check*](#)

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

Oak Grove Charter Academy

H-7

ROBERT DAVID FOUNTAIN, JR.

1194 Atreus Lane, Creedmoor, NC 27522 · 919.464.9880

otgconsultant@gmail.com

More than 30 years of professional experience, including supervisory and training responsibilities. Services deliver to diverse populations in a variety of settings from schools, private organizations, state institutions, private citizens, non-profit agencies, and departments.

EXPERIENCE

OCTOBER 2016 – OCTOBER 2018

SPECIAL OPERATIONS AND INTELLIGENCE UNIT, NC DEPARTMENT OF PUBLIC SAFETY

Responsible for specifying how the Extradition/Fugitive Section is to implement the powers and responsibilities specified by the Federal Uniform Criminal Extradition Act. Provided operational oversight for all extradition missions. Responsible for the training and supervision of Extradition Task Force Officers and the operational integrity of the extradition missions across the United States. Oversaw training and policy development for the Extradition Section.

APRIL 2014 – OCTOBER 2016

CORRECTIONAL ASSISTANT SUPERINTENDENT, NC DEPARTMENT OF PUBLIC SAFETY

Responsible for the continuing development of the Security Threat Group Initiatives as well as the training and implementation of policies in reference to gangs and threat groups. Assisted staff in the monitoring, identification and validation of individuals are considered Gang Members.

EDUCATION

JANUARY 2010 – MAY 2013

ASSOCIATE'S DEGREE, CRIMINAL JUSTICE, VANCE GRANVILLE COMMUNITY COLLEGE

Additional references and details are available upon request.



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: Oak Grove Charter Academy
2. Full name: Iris Garner

Home Address: 4702 R Jordan Rd Sanford, NC 27332

Business Name and Address: LAZ, 1840 E River Road Suite 320, Tucson, Arizona 85718

Telephone No.: 910.603.7079

E-mail address: irisbradgarner@windstream.net

3. Brief educational and employment history.
I have 25+ years of demonstrated experience in assessment, K-8 literacy program development/leadership, educational policy (federal, state, and local government), public speaking, strategic partnership, and accountability.
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 was recruited by Gerald McNair. I wish to serve on the board so that I can provide my expertise about curriculum scope and sequence and associated professional development.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.



6. What is your understanding of the appropriate role of a public charter school board member?
The role of a public charter school board member is to ensure that the school is responsive to values, beliefs, and priorities of the attending students, families, and community.
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 had experience serving on boards including a nonprofit organization as well as a charter school board.
8. Describe the specific knowledge and experience that you would bring to the board.
The knowledge that I bring to the board is curriculum development and evaluations as well as teacher preparedness and development.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
Oak Grove Charter Academy exists to prepare students with the academic skills and character traits necessary for success in college, careers, and life.
2. What is your understanding of the school's proposed educational program?
The school will use NHA's educational model that is centered on four pillars: academic excellence, moral focus, student responsibility, and parent partnership. This educational model has successfully been implemented at other NHA schools.
3. What do you believe to be the characteristics of a successful school?
I believe the following are characteristics of a successful school: rigorous yet-student centered curriculum, prepared teachers, mission-driven leadership, accountability, and a safe school culture.
4. How will you know that the school is succeeding (or not) in its mission?
The school's success should be measured with measurement tools including surveys, questionnaires, and student assessments.

Governance

1. Describe the role that the board will play in the school's operation.
As a board member, I will work to ensure that the school's mission and goals are supported, and practices are executed to guarantee success for all stakeholders.
2. How will you know if the school is successful at the end of the first year of operation?
The school's effectiveness measurement tools will illustrate the rate of the school's success. Based on that information, I will know the school's success rate at the end of the first year of operations.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.



3. How will you know at the end of five years of the schools is successful?
At the end of five years, assessment of effective measurement tools such as surveys and test results will help understand the success of the school.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
The specific steps the charter school board will need to ensure the school success includes implementing policies, strategies, best practices, oversight, strategic accountability along with empowering the leadership with comprehensive support and clearly articulated 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?
I believe it is important as a board member to uphold a high ethical standard. In the event of an unethical situation, I would bring this to the attention of the board president.

*Please include the following with your Information Form

- a one page resume

*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. [Click or tap here to enter text.](#)

Certification

I, Iris Garner, 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 Oak Grove Charter Academy is true and correct in every respect.

A handwritten signature in black ink, appearing to read 'Iris Garner'.

7/29/19

Signature

Date

[Appendix I – Board Member Background Certification Statement and Completed Background Check*](#)

DR. IRIS GARNER

4702 R Jordan Rd, Sanford, NC · 910.603.7079

irisnradgarner@windstream.net

Accomplished educational leader with 25+ years of demonstrated experience in assessment, K-8 Literacy Program development/leadership, educational policy (federal, state, and local government), public speaking, strategic partnerships, and accountability.

EXPERIENCE

2018 – PRESENT

GLOBAL RESEARCH CONSULTANT/STRATEGIC PARTNERSHIPS, LEARNING A-Z

- Presenting plans that promote student achievement and teacher preparedness to groups.
- Research and pilot educational methodologies to ensure effective students, teacher, and parent engagement.
- Create strategies and resources and ensure data privacy laws are employed in a manner that builds confidence and support data-driven decisions.

2014 – 2018

NATIONAL CURRICULUM CONSULTANT, LEARNING A-Z

- Collect and prepare analytics that showcase resource need and value to ensure purchase and renewal.
- Assess school, district, and state student performance data, parent engagement, instructional gaps, technology plan, and priority schools' trends.
- Present plans that promote student achievement and teacher preparedness.

2007 – 2014

NATIONAL ASSESSMENT OF EDUCATIONAL PROGRESS DIRECTOR (NAEP) NORTH CAROLINA DEPARTMENT OF PUBLIC INSTRUCTION

- Developed modules, media kits, interpretive guides, and policies for State Board and General Assembly.
- Balanced budget and budget projections.
- Development assessment interpretive support and created talking points for State Superintendent and Governor.

EDUCATION

2000-2001

DOCTOR OF PHILOSOPHY, EDUCATIONAL LEADERSHIP, UNION INSTITUTE AND UNIVERSITY

1994-1997

MASTER OF SCIENCE, ELEMENTARY EDUCATION, NOVA SOUTHEASTERN UNIVERSITY

1991-1993

BACHELOR OF SCIENCE, ADVERTISING, UNIVERSITY OF FLORIDA

ADDITIONAL REFERENCES AND DETAILS ARE AVAILABLE UPON REQUEST.



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: Oak Grove Charter Academy

2. Full name: Kyle Jones

Home Address: 101 Creek Ridge Dr, Goldsboro, NC 27530

Business Name and Address: Federal Aviation Administration, 1000 Sawyer Cir, Morrisville, NC 27560

Telephone No.: 919.739.6455

E-mail address: Kaj27534@yahoo.com

3. Brief educational and employment history.

I received my associate degree from ECPI University in Electronics Engineering Technology. I currently work as an Airway Transportation System Specialist where I install environmental, navigational and power generation equipment. Prior to that job, I was a Field Service Tech where I maintained and repaired generator equipment.

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?

Drummers World Drumline

No:

Yes:

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.



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?
My son currently attends a charter school in North Carolina. I like the concept of charter schools and I am grateful for the opportunity to learn more about charter schools and help make a difference.
6. What is your understanding of the appropriate role of a public charter school board member?
My understanding is to help makes decisions on the schools, examine teacher performance and programs the school offers.
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 am a board member on Drummer's World Drum Line in Goldsboro, North Carolina. My responsibility is to brainstorm new ideas, problem solving, apply for grants for the program, and fundraising.
8. Describe the specific knowledge and experience that you would bring to the board.
I am a business owner so I have experience and knowledge working with people, problem solving, being organized among other traits that would benefit the board. Also, serving on the Drummer's World Drum Line board has provided experience on how to be an effective board member. In addition, my son attends a charter school.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
Oak Grove Charter Academy exists to prepare students with the academic skills and character traits necessary for success in college, careers, and life.
2. What is your understanding of the school's proposed educational program?
My understanding is the board will work in partnership with National Heritage Academies. NHA has an extensive proven record of providing a successful educational program that not only provides a good education but also teaches character founded upon four pillars. The four pillars are: academic excellence, moral focus, student responsibility, and parent partnership.
3. What do you believe to be the characteristics of a successful school?
I value integrity and discipline. Therefore, the school will be successful if they are teaching students those traits and the four pillars. I believe discipline is a great learning procedure.
4. How will you know that the school is succeeding (or not) in its mission?
I believe the success or lack of success in the mission will be shown over time. Some key indicators will be: the number of students graduating high school, attitudes of teaching staff, and the environment in the school.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.



Governance

1. Describe the role that the board will play in the school's operation.
The board will assist in the hiring of staff, provide feedback on the curriculum and assist with outside activities such as sporting and other school events.
2. How will you know if the school is successful at the end of the first year of operation?
Student performance data and staff feedback will provide us insight on if the school is successful at the end of the first year.
3. How will you know at the end of five years of the schools is successful?
Enrollment data such as the school's wait list, end of grade testing, and teachers leaving district schools to come work at our school.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
Ensuring the finances are properly handled, staff in the building are properly trained and qualified, resources provided to students, and continuous professional development for staff will ensure the school is successful.
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 immediately bring this to the board president to take further action.

*Please include the following with your Information Form

- a one page resume

*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, Kyle A. Jones, 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 Oak Grove Charter Acad is true and correct in every respect.

Signature

Date


15 AUG 19

[Appendix I – Board Member Background Certification Statement and Completed Background Check*](#)

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

KYLE A. JONES

101 Creek Ridge Dr.

Goldsboro NC. 27530

H: 919-739-6455 C: 919-581-7710

Kaj27534@yahoo.com

Summary of Skills

- Broad level of expertise with Mechanical, Electrical and Electronic systems
- Power generator systems technician and power plant operator
- Residential HVAC installation and Air Duct Cleaning
- Class A licensed commercial driver from 1 to 40 tons
- Current Security Clearance
- Former foster parent with Bair Foundation and Omni Vision

EDUCATION

AAS Degree, Electronics Engineering Technology
ECPI UNIVERSITY- Raleigh, NC 2015

Diploma, Computer Technology
ECPI Computer College - Hampton, VA 1992

EXPERIENCE

Airway Transportation System Specialist, *Federal Aviation Administration* November 2018-*Present*

- Primary responsibilities include installing and maintaining Environmental, navigational and power generation equipment.

Field Service Tech, *Clarke Power Generation* October 2011-*May 2013*

- **Responsible** for performing troubleshooting and repair along with doing preventative maintenance of various manufactures stand-by generator equipment
- **Worked** with power systems ranging from 15KW- 2000KW diesel or NG/LP
- **Performed** load bank operations using the Avtron load-bank
- **Maintained** service truck inventory and tools
- **Directly** interacted and communicated with customers as well as facilitated or scheduled work to be done

Power Generation Lead Tech, *IAP Worldwide* December 2010-*September 2011*

- **Worked** directly with stand-by generators to include diagnosing faults, performing preventative maintenance, power plant operations, monitoring switch gear, electrical loads, and scheduling power generation maintenance actions
- **Generators serviced**; Caterpillar, FG Wilson, and Cummins 15Kw thru 1.2Mw
- **Engines serviced**; Perkins, Detroit diesel Cat 3406- 3516
- **Proficient** in performing load bank operations to check generator functions and optimize performance

LICENSES/CERTIFICATES

- Class A commercial driver's license
- Universal CFC certification
- NC. Journeyman HVAC mechanical card

ADDITIONAL REFERENCES AND DETAILS ARE AVAILABLE UPON REQUEST.



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.

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: Oak Grove Academy
2. Full name: Milton Tabron

Home Address: 137 Carriage Hill Dr, Stem, NC 27581

Business Name and Address: Retired

Telephone No.: 919.813.8384

E-mail address: tabronmilton@yahoo.com

3. Brief educational and employment history.
I am currently retired but prior to retirement I was the manager of a CVS Pharmacy. As the manager I facilitated the entire store operation. I was a store manager at Wendy's for over 10 years where I was responsible for controlling labor, managing the inventory of food, and supervising and training staff. I have also had experience working with the Durham County Parks and Recreation Department working with at-risk youth.
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:

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.



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 was recruited to join this board by Gerald McNair. I have a passion for working with children and education is very important to me. Growing up, my mother put four kids in college at the same time, so education has always been a big part of my family. I believe this is an opportunity to be a part of something bigger than me.
6. What is your understanding of the appropriate role of a public charter school board member?
An appropriate board member will respect everybody, be a leader but also follow when necessary, and act in a way that will benefit the board, students, and community we serve.
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 do not have previous experience serving on a charter school board, but I have worked with at risk youth for over 4 years with the Durham Parks and Recreation Department. I have the knowledge and experience to deal with at-risk youth in a professional manner.
8. Describe the specific knowledge and experience that you would bring to the board.
Working in customer service for over 20 years has given me the experience and knowledge to know how to treat people well, be organized, and manage my time well.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
Oak Grove Charter Academy exists to prepare students with the academic skills and character traits necessary for success in college, careers, and life.
2. What is your understanding of the school's proposed educational program?
National Heritage Academies (NHA) will work in partnership with Oak Grove Charter Academy. We will use the educational program centered on four pillars that is already in place and successful at other NHA partner-schools.
3. What do you believe to be the characteristics of a successful school?
A successful school is organized, and organization starts with good leadership. Also, a successful school provides good customer service to students, staff, families, and the community.
4. How will you know that the school is succeeding (or not) in its mission?
The atmosphere of the school will be indication of the success of the school. If staff, students, and parents are happy to be in Oak Grove Charter Academy then I believe we are succeeding in our mission. Also, the number of students going to high school, and college will indicate success.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.



Governance

1. Describe the role that the board will play in the school's operation.
The board will help the school showcase the mission and vision of the school. In addition, the board will review financial statements and academic standards.
2. How will you know if the school is successful at the end of the first year of operation?
There are three factors that will determine success at the end of the first year. 1. the turnover ratio of students and staff, 2. the number of returning students, and 3. the financial status of the school.
3. How will you know at the end of five years of the schools is successful?
At the end of five years, if our school enrollment has steadily increased, if we have many teachers still working at the school after five years who began when we first opened, and expansion of the school as far as programs and resources offered to students and families.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
The board will need to work together with NHA, the principal, families, and the community. It is important to make sure we are accommodating the needs of the families at Oak Grove Charter Academy.
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 report them to the Board President to have a discussion and work on how the issue can be solved. It would be fair to have the board vote on the situation.

*Please include the following with your Information Form

- a **one page** resume

*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, Milton Tabron, 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 Oak Grove Charter Academy is true and correct in every respect.

A handwritten signature in blue ink that reads 'Milton Tabron'.

August 20, 2019

Signature

Date

[Appendix I – Board Member Background Certification Statement and Completed Background Check*](#)

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.



MILTON TABRON

137 CARRIAGE HILL DR.
STEM, NC 27581

OBJECTIVE

Result-oriented professional with over 20 years of experience in a leadership role in customer service.

SKILLS

- Windows 3.1, 95 and 98
- IBM compatible operating systems

EXPERIENCE

MANAGER • C.V.S PHARMACY • 1995 – 2015

- Facilitate total store operation
- Hiring of full time and part time workers
- Created in house training classes in Total Qualities Management
- Inventory management
- Sales Reports per region

AT-RISK YOUTH WORKER • DURHAM PARKS AND RECREATION • 2001 – 2015

- Maintain a safe and secure environment for children
- Consult with and serve as a resource for students, staff, and parents regarding developmental needs of students
- Teach, coach, and supervise children in activities
- Help students set goals and provide support

STORE MANAGER • WENDY'S INTERNATIONAL • 1982 – 1995

- Responsible for controlling food and labor costs
- Managing food cost and shortage
- Hiring, training, and supervising staff

EDUCATION

B.A. IN HISTORY • 1981 • NORTH CAROLINA CENTRAL UNIVERSITY
A.S. IN GENERAL EDUCATION • 1978 • SANDHILLS COMMUNITY COLLEGE

ADDITIONAL REFERENCES AND DETAILS ARE AVAILABLE UPON REQUEST.



Appendix I: Board Member Background Certification Statement and Completed Background Check

Oak Grove Charter Academy



Appendix J: Proposed By-Laws of the School's Board of Directors

Oak Grove Charter Academy

BYLAWS OF
OAK GROVE CHARTER ACADEMY

ARTICLE I.
OFFICES

Section 1. Name and Seal. The name of the Corporation is OAK GROVE CHARTER ACADEMY, (the Corporation.)

The seal of the Corporation will bear the name OAK GROVE CHARTER ACADEMY and words indicating that the corporation was incorporated in North Carolina. Failure to affix the seal to corporate instruments shall not affect the validity of any such instrument.

Section 2. Purposes of the Corporation. The corporation is organized exclusively as a North Carolina Charter School, and as such is organized for educational and charitable purposes, including such purposes, the making of distributions to organizations that qualify as exempt under 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 Code.

Section 3. Members. The corporation shall have no members, certificate holders or shareholders. All functions and affairs of the corporation shall be directed entirely by the Board of Directors.

Section 4. Principal Office. The principal office of OAK GROVE CHARTER ACADEMY, (hereinafter referred to as "the Corporation") shall be located at Durham, North Carolina.

Section 5. Registered Office and Agent. The registered office and agent of the Corporation shall be as stated in the articles of incorporation.

ARTICLE II.
BOARD OF DIRECTORS

Section 1. General Powers. The business and affairs of the Corporation shall be managed by its board of directors.

Section 2. Number, Qualifications. The number of directors constituting the Board of Directors shall be at least five (5) and no more than seven (7). The Directors may from time to time change the number of directors by amendment of these bylaws. Directors shall be residents of the State of North Carolina.

Section 3. Election of Directors. Except as provided in Section 6 of this Article II, the directors shall be elected at the annual meeting of Directors, and those persons who receive the highest number of votes shall be deemed to have been elected. If any Director so demands, the election of directors shall be by

ballot.

Section 4. Term of Directors. The initial terms of directors shall hold office until the first Annual Directors meeting. After the initial term, Directors shall serve four (4) year terms from the date of their election, or until a successor is elected or appointed. Terms of the Directors shall be staggered so that the terms of all Directors do not expire at the same time. Directors shall not serve more than four (4) consecutive terms.

Section 5. Removal. Any director may be removed at any time with or without cause by a vote of the Directors if the number of votes cast to remove such director exceeds the number of votes cast not to remove them. If any directors are so removed, new directors may be elected at the same meeting.

Section 6. Vacancies. Any vacancy occurring on the board of directors, may be filled by a majority vote of the remaining directors.

Section 8. Compensation. No compensation shall be paid to directors. Expenses incurred by director conducting corporate business shall be paid upon approval by the Board.

Section 9. Conflict of Interest. The Board has adopted a conflict of interest policy which is attached as Appendix A to these by-laws.

Section 10. Qualifications of Directors. Directors shall be at least twenty-one (21) years of age, shall be current residents of North Carolina and shall have at least a high school diploma or its equivalent. Any such qualified person seeking election to the Board of Directors must submit to a reasonable screening process, including a criminal background check, by the Board.

ARTICLE III.

MEETINGS OF DIRECTORS

Section 1. Regular Meetings. A regular meeting of the board of directors shall be held immediately after, and at the same place as, the annual meeting. In addition the board of directors will provide, by resolution, a schedule of regular meeting dates which will be posted at the school and on its website.

Section 2. Special Meetings. Special meetings of the board of directors may be called by or at the request of the chairman or any two directors. Such a meeting will be held at the principal office or any other place determined by the Board.

Section 3. Emergency Meetings. The time, date and place of

an emergency meeting of the Board may be set at the call of the Chair or a majority of Board members. The Board shall make a reasonable attempt to notify the public of an emergency meeting before it occurs.

Section 4. Notice of Meeting. Regular meetings of the board of directors may be held without notice if held pursuant to the schedule approved by the board. The person or persons calling a special meeting of the board of directors shall, at least two days before the meeting, give notice thereof by any usual means of communication. Such notice must specify the purpose for which the meeting is called. Any duly convened regular or special meeting may be adjourned by the directors to a later time without notice. Members of the Board must notify the Chair of the Board of their inability to attend a meeting of the Board at least twenty four (24) hours prior to a meeting.

Section 5. Waiver of Notice. Any director may waive notice of any meeting. If the director does not attend the meeting, and if he wants to waive notice, he must provide the Corporation with a written waiver signed by him. Said waiver is to be included in the minutes or filed with the corporate records. The attendance by a director at a 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.

Section 6. Quorum. A majority of the number of directors in office shall constitute a quorum for the transaction of business at any meeting of the board of directors.

Section 7. Manner of Acting. Except as otherwise provided in these bylaws, the act of the majority of the directors present at a meeting at which a quorum is present shall be the act of the board of directors.

Section 8. Presumption of Assent. A director of the Corporation who is present at a meeting of the board of directors at which action on any corporate matter is taken shall be presumed to have assented to the action taken unless their contrary vote is recorded or their dissent is otherwise entered in the minutes of the meeting or unless they shall file their 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 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.

Section 9. Action without Meeting. Action required or permitted to be taken at a meeting of the board of directors may be taken without a meeting if the action is taken by a majority of the board. The action must be evidenced by one or more written consents signed by each director before or after such action, describing the action taken, and included in the minutes or filed with the corporate records.

Section 10. Conference Calls. Any one or more or all of the directors or members of a committee may participate in a meeting of the Board of Directors or committee by means of a conference telephone call or similar communications device that allows all persons participating in the meeting to hear and respond to each other and to which the public has access, except for closed sessions of the Board or committee. Participation in a meeting in this manner shall be deemed presence in person at such meeting.

Section 11. Parliamentary Rules and Open Meetings Law. All meetings shall be conducted in an open, orderly and fair manner. All meetings of the Board shall be held in compliance with the North Carolina Open Meetings Law, N.C. General Statutes section 143-318.9-318.19. While the Board may elect not to proceed in full compliance with Robert's Rules of Order, those procedures may be invoked at any time for use during part or all of a particular meeting upon motion supported by a majority vote.

ARTICLE IV.

OFFICERS

Section 1. Offices. The officers of the Corporation shall consist of a chairman, vice- chairman, a secretary and a treasurer. Any two or more offices may be held by the same person, but no officer may act in more than one capacity where action of two or more officers is required.

Section 2. Election and Term. The officers of the Corporation shall be elected by the Board of Directors. Each officer shall hold the office until t5he next annual meeting of the Board or their successor shall have been elected, their death, resignation, retirement, removal or disqualification.

Section 3. Removal. Any officer or agent elected or appointed by the board of directors may be removed by the board at any time with or without cause; but such removal shall be without prejudice to the contract rights, if any, of the person so removed.

Section 4. Resignation. An officer may resign at any time by communicating his resignation to the Corporation, orally or in

writing. A resignation is effective when communicated unless it specifies in writing a later effective date. If a resignation is made effective at a later date that is accepted by the Corporation, the board of directors may fill the pending vacancy before the effective date if the board provides that the successor does not take office until the effective date. An officer's resignation does not affect the Corporation's contract rights, if any, with the officer.

Section 6. Bonds. The board of directors may by resolution require any officer, agent, or employee of the Corporation to give bond to the Corporation, with sufficient sureties, conditioned on the faithful performance of the duties of their respective office or position, and to comply with such other conditions as may from time to time be required by the board of directors. The corporation shall pay the expense of any such bond

Section 7. Chairman. The Chairman shall, subject to the control of the Board of Directors, perform all duties incident to their office and such other duties as may be required by law or these bylaws, or which may be prescribed from time to time by the Board of Directors. Except s otherwise expressly provided by these bylaws, they shall, in the name of the corporation, execute such deeds, mortgages, contracts, bonds, checks or other instruments which may from time to time be authorized by the Board of Directors. They shall, when present, preside at all meetings of the Board.

Section 8. Vice-Chairman. In the absence of the Chairman or in the event of their death, inability or refusal to act, the vice-Chairman in the order of their length of service as such, unless otherwise determined by the board of directors, shall perform the duties of the Chairman, and when so acting shall have all the powers of and be subject to all the restrictions upon the Chairman. The vice-Chairman, shall perform such other duties as from time to time may be assigned to them by the Chairman or board of directors.

Section 9. Secretary. The secretary shall: (a) keep the minutes of the meetings of the board of directors, and of all committees 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) maintain and authenticate the records of the Corporation and be custodian of the seal of the Corporation and see that the seal of the Corporation is affixed to all documents to the execution of which on behalf of the Corporation under its seal is duly authorized;

(d) attest the signature or certify the incumbency or signature of any officer of the Corporation; and (e) in general perform all duties incident to the office of secretary and such other duties as from time to time may be prescribed by the Chairman or by the board of directors.

Section 10. Treasurer. The treasurer shall oversee all funds and securities of the Corporation subject to such regulations as the Board or state or federal law shall impose. The Treasurer may be required to give bond for faithful performance of their duties in such sum and with such sureties as the Board may require. The corporation shall pay the expense of any such bond. In general they shall perform all of the duties incident to the office of treasurer and such other duties as from time to time may be assigned to them by the Chairman or by the board of directors, or by these bylaws.

ARTICLE V.

CONTRACTS, LOANS, CHECKS, AUDITS, REPORTS AND DEPOSITS

Section 1. Contracts. The board of directors may authorize any officer or officers, agent or agents, to enter into any contract or execute and deliver any instrument in the name of and on the behalf of the Corporation, and such authority may be general or confined to specific instances.

Section 2. Loans. No loans shall be contracted on behalf of the Corporation and no evidence of indebtedness shall be issued in its name unless authorized by a resolution of the Board of Directors. Such authority may be general or confined to specific instances.

Section 3. Checks and Drafts. All checks, drafts or other orders for the payment of money, issued in the name of the Corporation, shall be signed by such officer or officers, agent or agents of the Corporation and in such manner as shall from time to time be determined by the resolution of the board of directors.

Section 4. Deposits. All funds of the Corporation not otherwise employed shall be deposited from time to time to the credit of the Corporation in such depositories as the board of directors may select.

Section 5. Audits. In compliance with the North Carolina Charter School Act, the accounts of the corporation shall be audited annually by a reputable certified public accountant, acceptable to the State of North Carolina, whose report shall be submitted to the State of North Carolina and each member of the Board and kept on file at the corporate office as required by law.

Section 6. Reports. The Board shall cause any annual or

periodic report required under law to be prepared and delivered to an office of this state or other governmental agency in the time set by law or regulation.

ARTICLE VI.

INDEMNIFICATION

Any person who at any time serves or has served as a director or officer of the Corporation, or who, while serving as a director or officer of the Corporation, serves or has served, at the request of the Corporation (which request shall be by resolution of the board of directors), as a director, officer, partner, trustee, employee, or agent of another corporation, partnership, joint venture, trust, or other enterprise, or as a trustee or administrator under an employee benefit plan, shall have a right to be indemnified by the Corporation to the fullest extent permitted by law

The board of directors of the Corporation shall take all such action as may be necessary and appropriate to authorize the Corporation to pay the indemnification required by this bylaw, including, without limitation, making a determination that indemnification is permissible in the circumstances and a good faith evaluation of the manner in which the claimant for indemnity acted and of the reasonable amount of indemnity due him/her. The board of directors may appoint a committee or special counsel to make such determination and evaluation.

ARTICLE VII.

GENERAL PROVISIONS

Section 1. Fiscal Year. The fiscal year of the corporation shall begin on the first day of July and end on the last day of June next ensuing.

Section 2. Amendments. Except as otherwise provided herein, these bylaws may be amended or repealed and new bylaws may be adopted by the board of directors.

Section 3. Definitions. Unless the context otherwise requires, terms used in these bylaws shall have the meanings assigned to them in the North Carolina Business Corporation Act to the extent defined therein.

The foregoing instrument, consisting of _____ pages, is hereby approved and accepted by the undersigned as the bylaws of OAK GROVE CHARTER ACADEMY in witness whereof I have set my hand and seal this the 14 day of August, 2019.


_____, DIRECTOR
GERALD MCNAIR



Appendix K: Articles of Incorporation

Oak Grove Charter Academy



NORTH CAROLINA

Department of the Secretary of State

To all whom these presents shall come, Greetings:

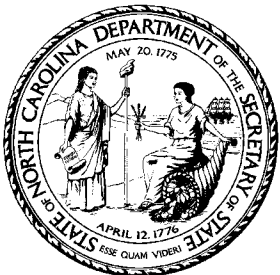
I, Elaine F. Marshall, Secretary of State of the State of North Carolina, do hereby certify the following and hereto attached to be a true copy of

ARTICLES OF INCORPORATION

OF

OAK GROVE CHARTER ACADEMY

the original of which was filed in this office on the 12th day of August, 2019.



Scan to verify online.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 12th day of August, 2019.

Elaine F. Marshall

Secretary of State

SOSID: 1878696
 Date Filed: 8/12/2019 9:28:00 AM
 Elaine F. Marshall
 North Carolina Secretary of State
 C2019 221 00913

State of North Carolina
 Department of the Secretary of State

ARTICLES OF INCORPORATION
 NONPROFIT CORPORATION

Pursuant to §55A-2-02 of the General Statutes of North Carolina, the undersigned corporation does hereby submit these Articles of Incorporation for the purpose of forming a nonprofit corporation.

1. The name of the nonprofit corporation is: Oak Grove Charter Academy

2. (Check only if applicable.) The corporation is a charitable or religious corporation as defined in NCGS §55A-1-40(4).

3. The name of the initial registered agent is: Philip S. Adkins

4. The street address and county of the initial registered agent's office of the corporation is:

Number and Street: 192 Sheep Rock Road
 City: Snow Camp State: NC Zip Code: 27349 County: Chatham

The mailing address *if different from the street address* of the initial registered agent's office is:

Number and Street or PO Box: _____
 City: _____ State: NC Zip Code: _____ County: _____

5. The name and address of each incorporator is as follows:

Name	Address
<u>Philip S. Adkins</u>	<u>192 Sheep Rock Road, Snow Camp, NC 27349</u>
_____	_____
_____	_____

6. (Check either "a" or "b" below.)

a. The corporation will have members.

b. The corporation will not have members.

7. Attached are provisions regarding the distribution of the corporation's assets upon its dissolution.

8. Any other provisions which the corporation elects to include are attached.

9. The street address and county of the principal office of the corporation is:

Principal Office Telephone Number: 919 218 6060
 Number and Street: 192 Sheep Rock Rd
 City: Snow Camp State: NC Zip Code: 27349 County: Chatham

The mailing address *if different from the street address* of the principal office is:

Number and Street or PO Box: _____
 City: _____ State: _____ Zip Code: _____ County: _____

10. **(Optional):** Listing of Officers (See instructions for why this is important)

Name	Address	Title

11. **(Optional):** Please provide a business e-mail address:

Privacy Redaction

The Secretary of State's Office will e-mail the business automatically at the address provided at no charge when a document is filed. The e-mail provided will not be viewable on the website. For more information on why this service is being offered, please see the instructions for this document.

12. These articles will be effective upon filing, unless a future time and/or date is specified: _____

This is the 6th day of August, 2019.

 Incorporator Business Entity Name
Philip S. Adkins Digitally signed by Philip S. Adkins
 Date: 2019.08.06 22:45:40 -04'00'

Signature of Incorporator
Philip S. Adkins, Attorney

Type or print Incorporator's name and title, if any

NOTES:

1. Filing fee is \$60. This document must be filed with the Secretary of State.

BUSINESS REGISTRATION DIVISION
 (Revised August, 2017)

P. O. BOX 29622

RALEIGH, NC 27626-0622
 Form N-01

Attachment to Articles of Incorporation of Oak grove Charter Academy

7. Distribution upon Dissolution

Upon the dissolution of the corporation, the Board of Directors shall, after paying or making provision for the payment of all the liabilities of the corporation distribute all net assets of the charter school purchased with public funds to the local school administrative unit in which the charter school is located pursuant to section 155C-218.100 of the North Carolina General Statutes. All of the remaining net assets of the corporation, the Board of Directors shall dispose of exclusively for the purposes of the corporation in such manner, or to such organization or organizations organized and operate exclusively for religious, charitable, educational, scientific or literary purposes as shall at the time qualify as an exempt organization or organizations under section 501 (C)(3)of the Code as the Board of Directors shall determine or to federal, state or local governments to be used exclusively for public purposes. Any such assets not so disposed of shall be disposed of by the Superior Court of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organizations, such as the court shall determine, which are organized and operated exclusively for such purposes, or to such governments for such purposes.

8. Prohibited Activities

No part of the net earnings of the corporation shall inure to the benefit of, or be distributed to, its members, directors, officers or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of purposes set forth in these article of incorporation. No substantial part of the activities of the corporation shall be carrying on of propaganda or otherwise attempting to influence legislation and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provision of these articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from Federal income tax under section 501(C) (3) of the Code or (b) by a corporation, contributions to which are deductible under section 170(c)(2) of the Code.



Appendix L: Insurance Quotes

Oak Grove Charter Academy



HUB International Limited

P.O. Box 2167
Grand Rapids, MI 49501
800-936-4236

hubinternational.com

July 29, 2019

RE: Oak Grove Academy – (NC)

Dear Charter Board of Directors:

Based on the attached specifications, the insurance quote would be as follows:

Proposed Amount:

Comprehensive General Liability \$1,000,000 per occurrence/\$2,000,000 aggregate
Premium Quoted - \$2,300.00

School Leaders Errors and Omissions \$1,000,000 per occurrence/\$2,000,000 aggregate
Premium Quoted - \$2,454.00

Property Insurance \$25,000.00 contents
Premium Quoted - \$400.00

Motor Vehicle Liability \$1,000,000 Combined Single Liability
Premium Quote - \$145.00

Crime Bonding Minimum \$1,000,000 Single Loss Limit
Premium Quote - \$1.00

All of the coverage above is under one package -Premium Quote - \$4,900.00

Umbrella Liability \$1,000,000 per occurrence / \$1,000,000 aggregate
Premium Quote - \$986.00

Workers' Compensation \$1,000,000
Premium Quote - \$500.00

Sincerely,

A handwritten signature in black ink, appearing to read 'Kelsey Holderman', with a long horizontal flourish extending to the right.

Kelsey Holderman
Account Manager
HUB International Midwest
(616) 233-0129



Appendix M: Revenue Assurances and/or Working Capital Report

Oak Grove Charter Academy



August 19, 2019

Gerald McNair
Lead Applicant
Oak Grove Charter Academy

Via: Hand Delivery

Re: Letter of Financial Commitment

Dear Mr. McNair,

National Heritage Academies (NHA) is proud and privileged to partner with you to provide a quality public charter school choice to families and students in the Durham County area through the proposal for Oak Grove Charter Academy. As you know, NHA currently partners with 88 schools across nine states to provide excellent K-8 public charter school choices to thousands of families and students. Through this experience we know that a major success factor for any school, and especially any charter school, is appropriate fiduciary oversight and planning.

With this letter, I confirm that, should Oak Grove Charter Academy receive a charter, NHA will make financial contributions as outlined in the draft Services Agreement between NHA and the Board, for as long as NHA is engaged as the school's management partner. As our draft Services Agreement states, neither the school nor any individual Board member shall be legally obligated to repay NHA for NHA contributions made to or on behalf of the school.

Our mutual commitment and partnership to creating an additional quality public charter school choice for children in the Durham County area is of the utmost importance to NHA; we will continue to meet the essence and substance of the vision we've jointly laid out for students in the charter application. I'm hopeful that this letter and our draft Services Agreement will suffice for the needs of your charter proposal.

Sincerely,

Bob Owen
Chief Financial Officer, National Heritage Academies



Appendix N: Proposed School Budget for Year 1 through Year 5

Oak Grove Charter Academy

Enrollment Projections Year 1 through Year 5

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

The numbers in the following tables are projections, or estimates, and do not bind the State to fund the school at any particular level.

LEA #1: 320-Durham Public	What percentage of students from the LEA selected above will qualify for EC funding?	13%
LEA #2:	What percentage of students from the LEA selected above will qualify for EC funding?	
LEA #3:	What percentage of students from the LEA selected above will qualify for EC funding?	

Grade	Year 1			Year 2			Year 3			Year 4			Year 5		
	LEA #1	LEA #2	LEA #3	LEA #1	LEA #2	LEA #3	LEA #1	LEA #2	LEA #3	LEA #1	LEA #2	LEA #3	LEA #1	LEA #2	LEA #3
	320			320			320			320			320		
Kindergarten	100			100			100			100			100		
Grade 1	84			84			84			84			84		
Grade 2	84			84			84			84			84		
Grade 3	84			84			84			84			84		
Grade 4	84			84			84			84			84		
Grade 5	84			84			84			84			84		
Grade 6				84			84			84			84		
Grade 7							84			84			84		
Grade 8										84			84		
Grade 9															
Grade 10															
Grade 11															
Grade 12															
LEA Totals:	520	0	0	604	0	0	688	0	0	772	0	0	772	0	0

For the first two years the State will fund the school up to the maximum projected enrollment for each of those years as set forth and approved in the projected enrollment tables. However, in subsequent years, the school may increase its enrollment only as permitted by NCGS 115C-218.7(b).

Budget: Revenue Projections from each LEA Year 1

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

In year 1: Base state allotments are determined by the LEA in which the student resides.

In year 2 and Beyond: Base State allotments are determined by the LEA in which the school is located.

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

State EC Funds: Charter schools receive a per pupil share of state funds per student with disabilities (school-aged 5 through 21). Funds are limited to 12.75% of the local education agency's average daily membership (ADM).

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

REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS

LEA #1:		320-Durham Public		
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds	\$5,506.61	520	\$2,863,437.20	
Local Funds	\$3,512.00	520	\$1,826,240.00	
State EC Funds	\$4,338.44	66	\$287,638.57	
Federal EC Funds	\$1,514.35	66	\$100,401.41	
			Total:	\$5,077,717.18

LEA #2:				
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds		0		
Local Funds		0		
State EC Funds		0		
Federal EC Funds		0		
			Total:	\$0.00

LEA #3:				
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds				
Local Funds				
State EC Funds				
Federal EC Funds				
			Total:	\$0.00

Total Budget: Revenue Projections Year 1 through Year 5

All per pupil amounts are from the most current information and would be approximations for Year 1.

Federal funding is based upon the number of students enrolled who qualify. The applicant should use caution when relying on federal funding in year one to meet budgetary goals.

These revenue projection figures do NOT guarantee the charter school would receive this amount of funding in Year 1.

For local funding amounts, applicants will need to contact their local offices or LEA.

Income: Revenue Projections	Year 1	Year 2	Year 3	Year 4	Year 5
State ADM Funds	\$ 2,863,437	\$ 3,325,992	\$ 3,788,548	\$ 4,251,103	\$ 4,251,103
Local Per Pupil Funds	\$ 1,826,240	\$ 2,121,248	\$ 2,416,256	\$ 2,711,264	\$ 2,711,264
State EC Funds	\$ 287,639	\$ 334,103	\$ 380,568	\$ 427,033	\$ 427,033
Federal EC Funds	-	\$ 100,401	\$ 132,839	\$ 149,057	\$ 149,057
Other Funds*	\$ 1,078,815	\$ 602,857	\$ 241,682	\$ 275,416	\$ 281,035
Working Capital*					
TOTAL REVENUE:	\$ 6,056,131	\$ 6,484,602	\$ 6,959,892	\$ 7,813,873	\$ 7,819,493

*All budgets should balance indicating strong budgetary skills. Any negative fund balances will, more than likely, generate additional questions by those evaluating the application. If the applicant is depending on other funding sources or working capital to balance the operating budget, please provide documentation such as signed statements from donors, foundations, bank documents, etc., on the commitment of these funds. If these figures are loans, the repayment needs to be explained in the narrative and found within the budget projections.

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

Personnel Budget: Expenditure Projections

Budget Expenditure Projections	Year 1			Year 2			Year 3			Year 4			Year 5		
	Number of Staff	Average Salary	Total Salary	Number of Staff	Average Salary	Total Salary	Number of Staff	Average Salary	Total Salary	Number of Staff	Average Salary	Total Salary	Number of Staff	Average Salary	Total Salary
Administrative & Support Personnel															
Lead Administrator	1	\$ 121,000	\$ 121,000	1	\$ 124,600	\$ 124,600	1	\$ 128,300	\$ 128,300	1	\$ 132,100	\$ 132,100	1	\$ 136,100	\$ 136,100
Assistant Administrator			\$ -			\$ -			\$ -			\$ -			\$ -
Finance Officer			\$ -			\$ -			\$ -			\$ -			\$ -
Clerical	1	\$ 21,600	\$ 21,600	1	\$ 22,200	\$ 22,200	1	\$ 22,900	\$ 22,900	1	\$ 23,600	\$ 23,600	1	\$ 24,300	\$ 24,300
Food Service Staff			\$ -			\$ -			\$ -			\$ -			\$ -
Custodians			\$ -			\$ -			\$ -			\$ -			\$ -
Transportation Staff			\$ -			\$ -			\$ -			\$ -			\$ -
Deans	2	\$ 63,200	\$ 126,400	3	\$ 65,100	\$ 195,300	3	\$ 67,100	\$ 201,300	3	\$ 69,100	\$ 207,300	3	\$ 71,200	\$ 213,600
Registrar	1	\$ 33,900	\$ 33,900	1	\$ 34,900	\$ 34,900	1	\$ 35,900	\$ 35,900	1	\$ 37,000	\$ 37,000	1	\$ 38,100	\$ 38,100
Admissions Representative	1	\$ 41,400	\$ 41,400	1	\$ 42,600	\$ 42,600	1	\$ 43,900	\$ 43,900	1	\$ 45,200	\$ 45,200	1	\$ 46,600	\$ 46,600
*** Edit text as needed. ***			\$ -			\$ -			\$ -			\$ -			\$ -
*** Edit text as needed. ***			\$ -			\$ -			\$ -			\$ -			\$ -
Total Admin and Support:	6		\$ 344,300	7		\$ 419,600	7		\$ 432,300	7		\$ 445,200	7		\$ 458,700
Instructional Personnel															
Core Content Teacher(s)	19	\$ 47,100	\$ 894,900	22	\$ 48,500	\$ 1,067,000	25	\$ 50,000	\$ 1,250,000	28	\$ 51,500	\$ 1,442,000	28	\$ 53,000	\$ 1,484,000
Electives/Specialty Teacher(s)	4	\$ 44,800	\$ 179,200	4	\$ 46,100	\$ 184,400	4	\$ 47,500	\$ 190,000	4	\$ 48,900	\$ 195,600	4	\$ 50,400	\$ 201,600
Exceptional Children Teacher(s)	3	\$ 48,500	\$ 145,500	4	\$ 50,000	\$ 200,000	5	\$ 51,500	\$ 257,500	6	\$ 53,000	\$ 318,000	6	\$ 54,600	\$ 327,600
Instructional Support	1	\$ 43,800	\$ 43,800	1	\$ 45,100	\$ 45,100	1	\$ 46,500	\$ 46,500	1	\$ 47,900	\$ 47,900	1	\$ 49,300	\$ 49,300
Teacher Assistants	2.625	\$ 20,200	\$ 53,025	3.5	\$ 20,800	\$ 72,800	4.375	\$ 21,400	\$ 93,625	5.25	\$ 22,000	\$ 115,500	5.25	\$ 22,700	\$ 119,175
English Language Learner Teacher	2	\$ 48,500	\$ 97,000	2	\$ 50,000	\$ 100,000	2	\$ 51,500	\$ 103,000	3	\$ 53,000	\$ 159,000	3	\$ 54,600	\$ 163,800
Interventionists	6	\$ 20,200	\$ 121,200	6	\$ 20,800	\$ 124,800	6	\$ 21,400	\$ 128,400	7	\$ 22,000	\$ 154,000	7	\$ 22,700	\$ 158,900
Substitute Teachers	1	\$ 16,200	\$ 16,200	1.15	\$ 16,700	\$ 19,205	1.3	\$ 17,200	\$ 22,360	1.5	\$ 17,700	\$ 26,550	1.5	\$ 18,200	\$ 27,300
Social Worker	0.8	\$ 52,500	\$ 42,000	0.9	\$ 54,100	\$ 48,690	1	\$ 55,700	\$ 55,700	1	\$ 57,400	\$ 57,400	1	\$ 59,100	\$ 59,100
Recess Aides	0.75	\$ 18,200	\$ 13,650	0.875	\$ 18,700	\$ 16,363	0.875	\$ 19,300	\$ 16,888	1	\$ 19,900	\$ 19,900	1	\$ 20,500	\$ 20,500
Total Instructional Personnel:	40.175		\$ 1,606,475	45.425		\$ 1,878,358	50.55		\$ 2,163,973	57.75		\$ 2,535,850	57.75		\$ 2,611,275
Total Admin, Support and Instructional Personnel:	46.175		\$ 1,950,775	52.425		\$ 2,297,958	57.55		\$ 2,596,273	64.75		\$ 2,981,050.00	64.75		\$ 3,069,975

Benefits	Year 1			Year 2			Year 3			Year 4			Year 5		
	Number of Staff	Cost Per	Total	Number of Staff	Cost Per	Total	Number of Staff	Cost Per	Total	Number of Staff	Cost Per	Total	Number of Staff	Cost Per	Total
Administrative & Support Benefits															
Health Insurance	6	\$ 9,985	\$ 59,910	7	\$ 10,185	\$ 71,295	7	\$ 10,390	\$ 72,730	7	\$ 10,600	\$ 74,200	7	\$ 10,810	\$ 75,670
Retirement Plan--NC State			\$ -			\$ -			\$ -			\$ -			\$ -
Retirement Plan--Other	6	\$ 860	\$ 5,160	7	\$ 895	\$ 6,265	7	\$ 920	\$ 6,440	7	\$ 940	\$ 6,580	7	\$ 965	\$ 6,755
Life Insurance			\$ -			\$ -			\$ -			\$ -			\$ -
Disability			\$ -			\$ -			\$ -			\$ -			\$ -
Medicare	6	\$ 615	\$ 3,690	7	\$ 640	\$ 4,480	7	\$ 660	\$ 4,620	7	\$ 670	\$ 4,690	7	\$ 690	\$ 4,830
Social Security	6	\$ 2,635	\$ 15,810	7	\$ 2,735	\$ 19,145	7	\$ 2,810	\$ 19,670	7	\$ 2,870	\$ 20,090	7	\$ 2,955	\$ 20,685
Dental Insurance	6	\$ 750	\$ 4,500	7	\$ 765	\$ 5,355	7	\$ 780	\$ 5,460	7	\$ 795	\$ 5,565	7	\$ 810	\$ 5,670
Life and Disability Insurance	6	\$ 85	\$ 510	7	\$ 90	\$ 630	7	\$ 90	\$ 630	7	\$ 95	\$ 665	7	\$ 95	\$ 665
Workers' Compensation	6	\$ 150	\$ 900	7	\$ 155	\$ 1,085	7	\$ 160	\$ 1,120	7	\$ 165	\$ 1,155	7	\$ 170	\$ 1,190
FUTA & SUTA	6	\$ 215	\$ 1,290	7	\$ 220	\$ 1,540	7	\$ 225	\$ 1,575	7	\$ 230	\$ 1,610	7	\$ 240	\$ 1,680
Tuition Reimbursement	6	\$ 240	\$ 1,440	7	\$ 265	\$ 1,855	7	\$ 265	\$ 1,855	7	\$ 260	\$ 1,820	7	\$ 265	\$ 1,855
Total Admin and Support Benefits:			\$ 93,210			\$ 111,650			\$ 114,100			\$ 116,375			\$ 119,000
Instructional Personnel Benefits															
Health Insurance	39.175	\$ 9,985	\$ 391,162	44.275	\$ 10,185	\$ 450,941	49.25	\$ 10,390	\$ 511,708	56.25	\$ 10,600	\$ 596,250	56.25	\$ 10,810	\$ 608,063
Retirement Plan--NC State			\$ -			\$ -			\$ -			\$ -			\$ -
Retirement Plan--Other	39.175	\$ 860	\$ 33,691	44.275	\$ 895	\$ 39,626	49.25	\$ 920	\$ 45,310	56.25	\$ 940	\$ 52,875	56.25	\$ 965	\$ 54,281
Social Security	40.175	\$ 2,635	\$ 105,861	45.425	\$ 2,735	\$ 124,237	50.55	\$ 2,810	\$ 142,046	57.75	\$ 2,870	\$ 165,743	57.75	\$ 2,955	\$ 170,651
Disability			\$ -			\$ -			\$ -			\$ -			\$ -
Medicare	40.175	\$ 615	\$ 24,708	45.425	\$ 640	\$ 29,072	50.55	\$ 660	\$ 33,363	57.75	\$ 670	\$ 38,693	57.75	\$ 690	\$ 39,848
Life Insurance			\$ -			\$ -			\$ -			\$ -			\$ -
Dental Insurance	39.175	\$ 750	\$ 29,381	44.275	\$ 765	\$ 33,870	49.25	\$ 780	\$ 38,415	56.25	\$ 795	\$ 44,719	56.25	\$ 810	\$ 45,563
Life and Disability Insurance	39.175	\$ 85	\$ 3,330	44.275	\$ 90	\$ 3,985	49.25	\$ 90	\$ 4,433	56.25	\$ 95	\$ 5,344	56.25	\$ 95	\$ 5,344
Workers' Compensation	39.175	\$ 150	\$ 5,876	44.275	\$ 155	\$ 6,863	49.25	\$ 160	\$ 7,880	56.25	\$ 165	\$ 9,281	56.25	\$ 170	\$ 9,563
FUTA & SUTA	40.175	\$ 215	\$ 8,638	45.425	\$ 220	\$ 9,994	50.55	\$ 225	\$ 11,374	57.75	\$ 230	\$ 13,283	57.75	\$ 240	\$ 13,860
Tuition Reimbursement	39.175	\$ 240	\$ 9,402	44.275	\$ 265	\$ 11,733	49.25	\$ 265	\$ 13,051	56.25	\$ 260	\$ 14,625	56.25	\$ 265	\$ 14,906
Total Instructional Personnel Benefits:			\$ 612,049			\$ 710,321			\$ 807,579			\$ 940,811			\$ 962,078
Total Personnel Benefits:			\$ 705,259			\$ 821,971			\$ 921,679			\$ 1,057,186			\$ 1,081,078
Total Admin & Support Personnel (Salary & Benefits):	6		\$ 437,510	7		\$ 531,250	7		\$ 546,400	7		\$ 561,575.00	7		\$ 577,700
Total Instructional Personnel (Salary & Benefits):	40.175		\$ 2,218,524	45.425		\$ 2,588,678	50.55		\$ 2,971,551	57.75		\$ 3,476,661	57.75		\$ 3,573,353
TOTAL PERSONNEL:	46.175		\$ 2,656,034	52.425		\$ 3,119,928	57.55		\$ 3,517,951	64.75		\$ 4,038,236	64.75		\$ 4,151,053

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

Operations Budget: Expenditure Projections

The following list of expenditure items is presented as an example. Applicants should modify to meet their needs.

OPERATIONS BUDGET: Administrative and Support	Year 1	Year 2	Year 3	Year 4	Year 5
Office					
Office Supplies	\$ 33,030.00	\$ 18,020.00	\$ 20,100.00	\$ 22,750.00	\$ 23,090.00
Paper					
Computers & Software	\$ 800.00	\$ 820.00	\$ 830.00	\$ 850.00	\$ 860.00
Communications & Telephone	\$ 7,750.00	\$ 9,330.00	\$ 10,220.00	\$ 11,140.00	\$ 11,280.00
Copier leases					
Other	\$ 2,560.00	\$ 2,570.00	\$ 2,580.00	\$ 2,590.00	\$ 2,600.00
Office Equipment	\$ 28,760.00	\$ 27,600.00	\$ 28,570.00	\$ 29,550.00	\$ 29,900.00
Management Company					
Contract Fees					
Other					
*** Insert rows and edit text as needed. ***					
Professional Contract					
Legal Counsel	\$ 10,500.00	\$ 10,500.00	\$ 10,500.00	\$ 10,500.00	\$ 10,500.00
Student Accounting					
Financial	\$ 76,940.00	\$ 77,200.00	\$ 78,060.00	\$ 101,120.00	\$ 87,440.00
Other					
*** Insert rows and edit text as needed. ***					
Facilities					
Facility Lease/Mortgage	\$ 1,345,280.00	\$ 1,345,280.00	\$ 1,345,280.00	\$ 1,345,280.00	\$ 1,345,280.00
Maintenance	\$ 116,790.00	\$ 130,710.00	\$ 93,130.00	\$ 95,590.00	\$ 94,080.00
Custodial Supplies	\$ 8,400.00	\$ 1,430.00	\$ 1,460.00	\$ 1,490.00	\$ 1,520.00
Custodial Contract	\$ 130,070.00	\$ 132,710.00	\$ 135,390.00	\$ 138,120.00	\$ 140,900.00
Insurance (pg19)	\$ 22,697.00	\$ 23,044.00	\$ 23,401.00	\$ 23,767.00	\$ 24,020.00
Supplies	\$ 8,060.00	\$ -	\$ -	\$ -	\$ -
Rent of Equipment	\$ 13,150.00	\$ 14,000.00	\$ 14,850.00	\$ 15,710.00	\$ 15,850.00
Utilities					
Electric	\$ 45,040.00	\$ 45,940.00	\$ 46,840.00	\$ 47,750.00	\$ 48,650.00
Gas	\$ 4,500.00	\$ 4,590.00	\$ 4,680.00	\$ 4,770.00	\$ 4,870.00
Water/Sewer	\$ 7,450.00	\$ 7,600.00	\$ 7,750.00	\$ 7,910.00	\$ 8,070.00
Trash	\$ 5,500.00	\$ 6,400.00	\$ 7,400.00	\$ 8,400.00	\$ 8,600.00
Internet Services	\$ 1,800.00	\$ 1,830.00	\$ 1,870.00	\$ 1,910.00	\$ 1,940.00
*** Insert rows and edit text as needed. ***					
Transportation					
Buses					
Gas					
Oil/Tires & Maintenance					
Other	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00
*** Insert rows and edit text as needed. ***					
Other					
Marketing	\$ 186,500.00	\$ 119,380.00	\$ 121,570.00	\$ 147,050.00	\$ 117,450.00
Child nutrition	\$ 178,970.00	\$ 212,660.00	\$ 245,100.00	\$ 280,210.00	\$ 285,470.00
Travel	\$ 17,840.00	\$ 13,740.00	\$ 14,670.00	\$ 15,870.00	\$ 16,160.00
Other	\$ 7,230.00	\$ 7,370.00	\$ 7,520.00	\$ 7,670.00	\$ 7,820.00
Administrative Support	\$ 88,970.00	\$ 89,060.00	\$ 89,960.00	\$ 121,070.00	\$ 102,180.00
Facilities Acquisition	\$ 37,320.00	\$ 32,850.00	\$ 5,240.00	\$ 7,040.00	\$ 5,940.00
Partner Relations	\$ 43,780.00	\$ 43,810.00	\$ 44,230.00	\$ 59,490.00	\$ 50,180.00
Board Expenditures	\$ 35,000.00	\$ 35,000.00	\$ 35,000.00	\$ 35,000.00	\$ 35,000.00
Total Administrative & Support Operations:	\$ 2,474,687.00	\$ 2,423,444.00	\$ 2,406,201.00	\$ 2,552,597.00	\$ 2,489,650.00

OPERATIONS BUDGET: Instructional		Year 1	Year 2	Year 3	Year 4	Year 5
Classroom Technology						
Software		\$ 2,080.00	\$ 2,130.00	\$ 2,170.00	\$ 2,220.00	\$ 2,260.00
Technology Services		\$ 122,580.00	\$ 133,170.00	\$ 144,290.00	\$ 183,680.00	\$ 169,750.00
*** Insert rows and edit text as needed. ***						
Instructional Contract						
Staff Development		\$ 121,870.00	\$ 80,930.00	\$ 83,410.00	\$ 94,610.00	\$ 90,110.00
Staff Recruitment and Retention		\$ 73,730.00	\$ 86,150.00	\$ 99,220.00	\$ 146,750.00	\$ 127,960.00
Special Education Services		\$ 207,160.00	\$ 233,880.00	\$ 261,820.00	\$ 270,190.00	\$ 277,940.00
Curriculum Development & Intervention Svcs		\$ 62,220.00	\$ 72,650.00	\$ 83,670.00	\$ 126,250.00	\$ 108,880.00
Books and Supplies						
Instructional Materials		\$ 100,750.00	\$ 98,830.00	\$ 105,510.00	\$ 116,700.00	\$ 123,060.00
Curriculum/Texts		\$ 64,640.00	\$ 51,940.00	\$ 62,580.00	\$ 67,740.00	\$ 68,070.00
Copy Paper		\$ 17,400.00	\$ 19,980.00	\$ 22,650.00	\$ 26,180.00	\$ 26,690.00
Testing Supplies		\$ 40,920.00	\$ 43,060.00	\$ 45,440.00	\$ 57,090.00	\$ 51,290.00
Instructional Equipment		\$ 108,940.00	\$ 114,860.00	\$ 120,780.00	\$ 126,700.00	\$ 127,680.00
Field Trips		\$ 3,120.00	\$ 3,650.00	\$ 4,200.00	\$ 4,930.00	\$ 5,100.00
Total Instructional Operations:		\$ 925,410.00	\$ 941,230.00	\$ 1,035,740.00	\$ 1,223,040.00	\$ 1,178,790.00
TOTAL OPERATIONS:		\$ 3,400,097.00	\$ 3,364,674.00	\$ 3,441,941.00	\$ 3,775,637.00	\$ 3,668,440.00

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

Appendix N: Proposed School Budget for Year 1 through Year 5

Overall Budget

SUMMARY	Logic	Year 1	Year 2	Year 3	Year 4	Year 5
Total Personnel	J	\$ 2,656,033.63	\$ 3,119,928.00	\$ 3,517,951.00	\$ 4,038,236.25	\$ 4,151,052.50
Total Operations	M	\$ 3,400,097.00	\$ 3,364,674.00	\$ 3,441,941.00	\$ 3,775,637.00	\$ 3,668,440.00
Total Expenditures	N = J + M	\$ 6,056,130.63	\$ 6,484,602.00	\$ 6,959,892.00	\$ 7,813,873.25	\$ 7,819,492.50
Total Revenue	Z	\$ 6,056,130.63	\$ 6,484,602.00	\$ 6,959,892.00	\$ 7,813,873.25	\$ 7,819,492.50
Surplus / (Deficit)	= Z - N	\$ -	\$ -	\$ -	\$ -	\$ -



Appendix O: Additional Appendices Provided by Applicant

Oak Grove Charter Academy

Make the mark.

Plante Moran K-12 and charter school experience



plante moran | Audit. Tax. Consulting.
Wealth Management.

Serving school districts for 60 years

Our experience serving the K-12 industry is more than deep industry knowledge; for over six decades, we've worked with school districts to help streamline operations, contain costs, and stay ahead of the technology curve. Why? It's simple: investing in our clients means investing in the future of our communities.

A best-in-class reputation

- 60+** years serving schools
- 150+** professionals who specialize in the education industry
- 200+** K-12 school districts served
- 500+** single audits annually performed firmwide (ranked second highest in the country)

Our clients

- 1,300** public sector clients
- \$1M-\$1B** range of budgets for school clients we serve
- \$9B** Federal expenditures audited per year



A curriculum for success

We know you expect exceptional service, but it's our job to offer more. When we work with school districts, we look at the whole picture.



Technology

We use technology to help you control cost and stay ahead of industry changes. Our experts develop strategies for K-12 districts, from ERP system management to controlling cybersecurity risk.



Services

Audit. Cybersecurity. Employee benefit consulting. We offer a full range of services to help you prepare for school accounting, anticipate challenges, and improve operations.



Leadership

Each K-12 audit staff member attends School Districts training programs and Single Audits training programs, as well as Understanding Governmental Financial Statements (GASB 34) training.

Industry leadership throughout the year

Our K-12 experts are proven industry leaders, serving more than 200 educational institutions, including K-12 districts, intermediate school districts, private schools, and public school academies. From pre-planning to advising throughout the engagement, we'll be by your side from day one, guiding you throughout the year so you're prepared, informed, and successful.

The right team for you

We know a smooth and efficient audit is your top priority. We're always thinking of ways to better position our clients for success. In addition to our audit experts working for you, we can assemble a team of specialists to fit <<clientShort>>'s unique needs, including CPAs, technology professionals, management consultants, forensic accountants, and facility/construction advisors, **with the goal of building and maintaining a long-term relationship.**

Training resources and support to keep things simple

We understand your time is valuable. We develop numerous technical and work aids for school administration to make the audit process easy to manage. Over the last two years, we have provided over 25 hours of internally developed webinars and training conference calls to school team members on tools specific to school districts. What does that mean for you? We keep things simple to make your job easier. **Our objective is to provide you with the resources you need to help improve your school beyond audit and compliance work — now and in the future.**

From financial statement auditing and employee benefit planning services to solutions for student management systems and technology implementation, we take a holistic approach to serving the K-12 industry.



We don't just participate — we lead

We take our commitment to the school district community very seriously. We don't just belong to various organizations — we view it as our duty to be involved as **an advocate for our clients**, to **gain information** for our clients, and to help **shape the practical application of various rules and regulations.** We are heavily involved in the following organizations:

- American Institute of Certified Public Accountants (AICPA)
- Association of School Business Officials International
- Government Finance Officers Association
- Michigan School Business Officials (MSBO)
- Michigan Association of School Administrators (MASA)
- Michigan Association of School Boards (MASB)
- Michigan Association of CPAs (MACPA)
- State of Michigan Department of Education

Sharing knowledge to help you stay informed

From changing regulations, to technology strategies, to risks and challenges facing the K-12 industry today, we stay informed to help your school district stay ahead of change.



Webinars

- [GASB 74 and 75: Implementing the new GASB OPEB standards](#)
- [GASB 74 and 75: Examining the new GASB OPEB standards](#)
- [Let's all agree on what's fair — GASB 72 fair value explained](#)
- [Uniform Grant Guidance: What are you missing?](#)
- [Information security trends for K-12](#)



Articles

- [How does the evolving K-12 ERP marketplace impact your district?](#)
- [Implementing an ERP system? Strengthen controls to prevent fraud](#)
- [GASB 87, Leases: What you need to know](#)
- [New OPEB standards: Implementation is here](#)
- [What you need to know about GASB 77 \(tax abatement disclosures\)](#)
- [Uniform guidance procurement standards delay: One more year](#)
- [That's not fair! Or is it? Fair value explained.](#)
- [Technology trends in K-12 education](#)



White papers

- [Enterprise asset management: Strategizing equipment & infrastructure investments](#)
- [Navigate the Complexity of Choosing Devices for Your Classroom](#)
- [OMB Grants Reform Guidebook: Diving into the Super Circular](#)

National organizations

American Institute Of Certified Public Accountants (AICPA)

- Charter member, Governmental Audit Quality Center (GAQC)
- Member, AICPA Government/Not-For-Profit Entities Expert Panel
- Invited participant to the National Federal Single Audit Roundtable
- Member, Executive Committee
- Member, Governmental Accounting Standards Board, National course developer of “Auditing Public Schools” Board, past participation on the Governmental Accounting Standards Advisory Council
- Member, Governmental Accounting and Auditing Conference Planning Task Force
- Former Member, GAQC task force to plan annual member update webinar
- Presenter, GAQC webinars on single audit and governmental accounting and auditing issues
- Presenter, AICPA Governmental Accounting and Auditing Update Conference
- Reviewer, AICPA governmental and single audit guides and Federal Compliance Supplement

Association Of School Business Officials International

- Member and national conference participant
- Participated in the previous ASBO certificate of excellence panel of review

Government Finance Officers Association

- Special Review Committee for the Certificate of Excellence in Financial Reporting
-

Serving charter schools



Our clients

100+ charter schools served

150-
1,400+ student enrollment in our charter school clients

Our expertise

60+ years serving schools

150+ professionals who specialize in the education industry

We serve more than 100 independent and third-party charter schools nationwide that range in size from 150 students up to 1,400 students. We have a number of current charter school clients that we have served since their first year of operation and we've had the pleasure of watching them grow and thrive. We understand the unique funding challenges and increasing expenditure issues facing charter schools today because we serve charter schools of different sizes, in different locations, and with different funding sources.

Broad expertise to serve you

- With significant experience working with multiple charter school management companies servicing schools in states including Michigan, Indiana, Arizona, Louisiana, North Carolina, Georgia, and Texas, we understand the "best practices" of operating a school with central management.
- We are also sensitive to the needs of charter schools in urban areas, as we have served schools in Chicago, Detroit, Flint, Phoenix, and New Orleans. Our goal is not to just provide you with an audit opinion, but to leverage our knowledge of the charter school industry and pass that knowledge along to you.



National Heritage Academies in North Carolina

Overview: National Heritage Academies (NHA) is a leading charter school operator committed to educating more children and challenging each child to succeed. Its ten North Carolina partner schools – Forsyth Academy in Winston-Salem, Greensboro Academy in Greensboro, PreEminent Charter School in Raleigh, Queen’s Grant in Mint Hill, Research Triangle in Durham, Summerfield Charter Academy in Summerfield, Wake Forest Charter Academy in Wake Forest, Winterville Charter Academy in Winterville, Gate City Charter Academy in Greensboro, Matthews Charter Academy in Matthews, Johnston Charter Academy in Clayton, and Rolesville Charter Academy in Rolesville – all serve urban or suburban communities and meet the unique needs of each community. With independent local boards as partners, NHA is making steady progress bringing the sustained academic improvement these communities seek and deserve.

NHA's 2018-19 National Profile	
Number of schools	88
Total enrollment	59,786
% minority students	75%
% eligible for free/reduced price lunch	72%
# of students on wait lists	21,319
Total employment	6,695

NHA's 2018-19 North Carolina Profile	
Number of schools	13
Total enrollment	9,038
% minority students	59%
% eligible for free/reduced price lunch	41%
# of students on wait lists	6,764
Total employment	928

Academics: Nationally, and in North Carolina, NHA partner schools deliver consistently better academic results than neighboring district schools at much lower taxpayer costs. In North Carolina, 47 percent of new students entered below grade level in fall 2017. These students achieved academic growth above the national average from fall to spring. This record is driven by NHA’s commitment to a durable learning culture built on four pillars:

- **Academic excellence:** The curriculum includes all core subjects along with art, music, library, and physical education classes. School culture emphasizes college readiness from the earliest grades.
- **Character development:** Schools infuse coursework with lessons on such virtues as compassion, respect, and integrity so students build *moral, intellectual, performance, and social* character.
- **Parental partnership:** Schools work to involve parents in school activities and offer a designated "parent room" where parents can meet, collaborate, and support learning.
- **Student responsibility:** Students must meet high standards. They commit to hard work, work with teachers to set unique learning goals, and learn over time that effort creates ability.

Commitment to schools: NHA covers *all* start-up costs of designing, building, and/or renovating a school tailored for NHA's academic model. It also covers costs of launching the academic program, and it often contributes its own funds for supplemental instruction. Under this model, which relieves boards of a burden that crushes many charter school projects, NHA leases the building to partner boards in predicable commercial leases. The leases, which are negotiated with boards, impose no automatic rent increases and reflect appropriate value of these one-purpose buildings.



Academic Overview of NHA Partner Schools in North Carolina

Below is 2017-18 academic information for NHA-partner schools in North Carolina. Eight schools met or exceeded growth and eight schools earned a 'C' or above on the state's accountability system.

NHA School	% Minority	2017-18 % Free or Red. Lunch		2017-18 Growth Status	2017-18 Letter Grade	2017-18 Reading Proficiency		2017-18 Math Proficiency	
		Sch.	Dist.			Sch.	Dist.	Sch.	Dist.
Forsyth Academy	90%	80%	62%	Met	C	52%	51%	45%	50%
Gate City	91%	79%	65%	Exceeded	C	45%	51%	47%	53%
Greensboro	29%	7%	65%	Exceeded	A	87%	52%	90%	51%
Matthews	44%	39%	59%	Met	C	65%	56%	58%	61%
Peak	43%	12%	34%	Met	B	77%	65%	79%	63%
PreEminent	98%	74%	34%	Exceeded	C	44%	65%	46%	63%
Queen's Grant	36%	15%	59%	Met	B	69%	55%	69%	60%
Research Triangle	95%	65%	65%	Not Met	D	50%	46%	45%	46%
Summerfield Academy	32%	15%	65%	Exceeded	B	79%	52%	83%	50%
Wake Forest	26%	14%	34%	Met	B	76%	65%	77%	63%
Winterville	63%	47%	64%	Met	C	57%	52%	55%	52%

In most instances, NHA-partner schools demonstrate higher proficiency rates than the school district in which they are located. When compared to a composite of nearby district schools, which are more likely to enroll students with comparable academic needs, seven out of ten NHA-partner schools perform at or above their composite districts.

	FRL % (2017-18)	Reading Proficiency	Math Proficiency
		(2017-18)	(2017-18)
Forsyth Academy	80%	52%	45%
5 Closest Schools	100%	34%	33%
Gate City	79%	45%	47%
5 Closest Schools	95%	32%	31%
Greensboro	7%	87%	90%
5 Closest Schools	49%	70%	67%
Matthews	39%	65%	58%
5 Closest Schools	35%	70%	73%
Peak	12%	77%	79%
5 Closest Schools	16%	75%	75%
PreEminent	74%	44%	46%
5 Closest Schools	72%	43%	40%
Queen's Grant	15%	69%	69%
5 Closest Schools	59%	58%	62%
Research Triangle	65%	50%	45%
5 Closest Schools	88%	49%	35%
Summerfield Academy	15%	79%	83%
5 Closest Schools	16%	79%	80%
Wake Forest	14%	76%	77%
5 Closest Schools	16%	79%	79%
Winterville	47%	57%	55%
5 Closest Schools	53%	61%	58%

Academic Performance of NHA-Partner Schools

National Heritage Academies (NHA)-partner school students receive the equivalent of three-and-a-half months of extra learning every year compared with their traditional public school peers. Students at NHA-partner schools experience about 80 days of additional learning in math and 63 days in reading for a composite score of 71 days of extra education, according to the report by Stanford's Center for Research on Education Outcomes, or Credo. Overall, NHA was among the top 20 percent of schools surveyed, ranking in the 84th percentile and outperforming more than four-fifths of the other charter school systems studied (CREDO, 2017). <https://credo.stanford.edu/pdfs/CMO%20FINAL.pdf>

State	School	Address	City, State, Zip	Geographic District	Authorizer	Opening Year	Grades Served	2017-18 Academic Performance					
								Enrollment	FRL	School ELA Proficiency	District ELA Proficiency	School Math Proficiency	District Math Proficiency
MI	Excel Charter Academy	4201 Breton Ave SE	Grand Rapids, MI 49512-3857	Kentwood Public Schools	Grand Valley State University	1995	K - 8	775	50%	67%	47%	58%	35%
MI	Vanderbilt Charter Academy	301 West 16th St	Holland, MI 49423-3329	Holland City School District	Grand Valley State University	1996	K - 8	463	74%	46%	43%	45%	33%
MI	Vanguard Charter Academy	1620 - 52nd St SW	Wyoming, MI 49519-9629	Wyoming Public Schools	Grand Valley State University	1996	K - 8	778	53%	57%	33%	58%	24%
MI	Vista Charter Academy	711 - 32nd St SE	Grand Rapids, MI 49548-2307	Godwin Heights Public Schools	Bay Mills Community College	1996	K - 8	704	91%	38%	25%	23%	17%
MI	Cross Creek Charter Academy	7701 Kalamazoo Ave SE	Byron Center, MI 49315-9534	Caledonia Community Schools	Central Michigan University	1997	K - 8	781	32%	72%	72%	67%	69%
MI	Eagle Crest Charter Academy	11950 Riley St	Holland, MI 49424-8553	West Ottawa Public School District	Central Michigan University	1997	K - 8	724	50%	69%	55%	66%	41%
MI	Knapp Charter Academy	1759 Leffingwell Ave NE	Grand Rapids, MI 49525-4531	Forest Hills Public Schools	Grand Valley State University	1997	K - 8	745	67%	44%	25%	35%	17%
MI	Walker Charter Academy	1801 Three Mile Rd NW	Walker, MI 49544-1445	Kenowa Hills Public Schools	Grand Valley State University	1997	K - 8	739	42%	58%	45%	57%	32%
MI	Endeavor Charter Academy	380 N. Helmer Rd	Springfield, MI 49037-7776	Battle Creek Public Schools	Grand Valley State University	1998	K - 8	680	81%	26%	15%	21%	8%
MI	Paragon Charter Academy	3750 McCain Rd	Jackson, MI 49201-7675	Jackson Public Schools	Grand Valley State University	1998	K - 8	678	63%	45%	24%	37%	17%
MI	Paramount Charter Academy	3624 S. Westnedge Ave	Kalamazoo, MI 49008-2969	Kalamazoo Public School District	Bay Mills Community College	1998	K - 8	452	86%	24%	35%	13%	30%
MI	Ridge Park Charter Academy	4120 Camelot Ridge Dr SE	Grand Rapids, MI 49546-2432	Forest Hills Public Schools	Lake Superior State University	1998	K - 8	562	82%	45%	25%	37%	17%
MI	Timberland Charter Academy	2574 McLaughlin Ave	Muskegon, MI 49442-4439	Orchard View Schools	Grand Valley State University	1998	K - 8	729	95%	14%	17%	11%	12%
MI	Burton Glen Charter Academy	4171 Atherton Rd	Burton, MI 48519-1435	Atherton Community Schools	Northern Michigan University	1999	K - 8	599	96%	10%	8%	7%	6%
MI	Chandler Woods Charter Academy	6895 Samrick Ave Private	Belmont, MI 49306-8844	Comstock Park Public Schools	Grand Valley State University	1999	K - 8	779	23%	68%	56%	71%	59%
NC	Forsyth Academy	5426 Shattalon Dr	Winston-Salem, NC 27106-1919	Forsyth County Schools	North Carolina State Board of Education	1999	K - 8	686	80%	52%	51%	44%	50%
NC	Greensboro Academy	4049 Battleground Ave	Greensboro, NC 27410-8410	Guilford County Schools	North Carolina State Board of Education	1999	K - 8	758	7%	86%	52%	90%	50%
MI	Linden Charter Academy	3244 N Linden Rd	Flint, MI 48504-1753	Westwood Heights Schools	Central Michigan University	1999	K - 8	794	98%	31%	8%	12%	6%
MI	North Saginaw Charter Academy	2332 Trautner Dr	Saginaw, MI 48604-9593	Saginaw City School District	Central Michigan University	1999	K - 8	512	95%	23%	29%	9%	23%
MI	South Arbor Charter Academy	8200 Carpenter Rd	Ypsilanti, MI 48197-9173	Milan Area Schools	Central Michigan University	1999	K - 8	796	21%	75%	67%	73%	66%
MI	Walton Charter Academy	744 East Walton Blvd	Pontiac, MI 48340-1361	Pontiac City School District	Northern Michigan University	1999	K - 8	815	90%	28%	14%	24%	11%
MI	Windemere Park Charter Academy	3100 W. Saginaw Street	Lansing, MI 48917-2307	Waverly Community Schools	Grand Valley State University	1999	K - 8	642	74%	43%	19%	37%	13%
MI	Canton Charter Academy	49100 Ford Rd	Canton, MI 48187-5415	Plymouth-Canton Community Schools	Central Michigan University	2000	K - 8	749	17%	74%	61%	68%	60%
MI	Metro Charter Academy	34800 Ecorse Rd	Romulus, MI 48174-1642	Romulus Community Schools	Grand Valley State University	2000	K - 8	726	72%	40%	25%	33%	20%
NC	PreEminent Charter School	3815 Rock Quarry Rd	Raleigh, NC 27610-5123	Wake County Schools	North Carolina State Board of Education	2000	K - 8	623	74%	45%	65%	46%	63%
NC	Research Triangle Charter Academy	2418 Ellis Rd	Durham, NC 27703-5543	Durham Public Schools	North Carolina State Board of Education	2000	K - 8	735	65%	50%	46%	45%	46%
MI	Warrendale Charter Academy	19400 Sawyer Rd	Detroit, MI 48228-3330	Detroit Public Schools Community District	Grand Valley State University	2001	K - 8	754	98%	31%	12%	20%	7%
MI	Detroit Merit Charter Academy	1091 Alter Rd	Detroit, MI 48215-2861	Detroit Public Schools Community District	Grand Valley State University	2002	K - 8	738	93%	40%	12%	24%	7%
OH	North Dayton School of Discovery	3901 Turner Rd	Dayton, OH 45415-3654	Dayton City	Educational Service Center of Lake Erie West	2002	K - 8	635	100%	31%	33%	25%	25%
NC	Queen's Grant Community School	6400 Matthews-Mint Hill Rd	Mint Hill, NC 28227-9323	Mecklenburg County	North Carolina State Board of Education	2002	K - 8	765	15%	69%	55%	68%	60%
NY	Southside Academy Charter School	2200 Onondaga Creek Blvd	Syracuse, NY 13207-2361	Syracuse City School District	New York State Education Department	2002	K - 8	677	92%	32%	15%	33%	13%
IN	Andrew J. Brown Academy	3600 N. German Church Rd	Indianapolis, IN 46235-8504	Indianapolis Public Schools	Indianapolis Mayor's Office	2003	K - 8	680	96%	40%	37%	36%	31%
NY	Brooklyn Excelsior Charter School	856 Quincy St	Brooklyn, NY 11221-3612	NYC Geog. District 16	SUNY Charter Schools Institute	2003	K - 8	633	90%	49%	34%	50%	30%
NY	Buffalo United Charter School	325 Manhattan Ave	Buffalo, NY 14214-1809	Buffalo City School District	SUNY Charter Schools Institute	2003	K - 8	640	94%	27%	23%	24%	21%
MI	Hamtramck Academy	11420 Conant St	Hamtramck, MI 48212-3134	Hamtramck Public Schools	Bay Mills Community College	2003	K - 8	538	98%	46%	19%	46%	18%
MI	Keystone Academy	47925 Bemis Rd	Belleville, MI 48111-9760	Van Buren Public Schools	Bay Mills Community College	2003	K - 8	780	37%	58%	28%	50%	27%
OH	Pathway School of Discovery	173 Avondale Dr	Dayton, OH 45404-2123	Dayton City	Educational Service Center of Lake Erie West	2003	K - 8	767	75%	42%	33%	43%	25%
OH	Alliance Academy of Cincinnati	1712 Duck Creek Rd	Cincinnati, OH 45207-1644	Cincinnati City	Educational Service Center of Lake Erie West	2004	K - 8	599	100%	26%	51%	27%	49%
OH	Apex Academy	16005 Terrace Rd	East Cleveland, OH 44112-2001	East Cleveland City School District	Educational Service Center of Lake Erie West	2004	K - 8	514	100%	39%	36%	34%	26%
MI	Detroit Enterprise Academy	11224 Kercheval St	Detroit, MI 48214-3323	Detroit Public Schools Community District	Grand Valley State University	2004	K - 8	739	96%	31%	12%	22%	7%
MI	Detroit Premier Academy	7781 Asbury Park	Detroit, MI 48228-3685	Detroit Public Schools Community District	Grand Valley State University	2004	K - 8	773	97%	29%	12%	18%	7%
OH	Emerson Academy of Dayton	501 Hickory St	Dayton, OH 45410-1232	Dayton City	Educational Service Center of Lake Erie West	2004	K - 8	656	100%	29%	33%	30%	25%
MI	Fortis Academy	3875 Golfside Dr	Ypsilanti, MI 48197-3726	Ypsilanti Community Schools	Bay Mills Community College	2004	K - 8	745	77%	47%	22%	38%	16%
MI	Great Oaks Academy	4257 Bart St	Warren, MI 48091-1977	Warren Consolidated Schools	Bay Mills Community College	2004	K - 8	735	92%	36%	12%	28%	7%
MI	Laurus Academy	24590 Lahser Rd	Southfield, MI 48034-6040	Southfield Public School District	Bay Mills Community College	2004	K - 8	747	76%	44%	30%	31%	17%
OH	Orion Academy	1798 Queen City Ave	Cincinnati, OH 45214-1427	Cincinnati City	Educational Service Center of Lake Erie West	2004	K - 8	550	100%	18%	51%	17%	49%
OH	Pinnacle Academy	860 E. 222nd St	Cleveland, OH 44123-3317	Euclid City	Educational Service Center of Lake Erie West	2004	K - 8	735	89%	29%	41%	32%	31%
MI	Prevail Academy	353 Cass Ave	Mount Clemens, MI 48043-2112	Mt. Clemens Community School District	Bay Mills Community College	2004	K - 8	589	83%	27%	15%	26%	12%
MI	Triumph Academy	3000 Vivian Rd	Monroe, MI 48162-8600	Jefferson Schools	Bay Mills Community College	2004	K - 8	729	55%	51%	32%	43%	22%

Academic Performance of NHA-Partner Schools

National Heritage Academies (NHA)-partner school students receive the equivalent of three-and-a-half months of extra learning every year compared with their traditional public school peers. Students at NHA-partner schools experience about 80 days of additional learning in math and 63 days in reading for a composite score of 71 days of extra education, according to the report by Stanford's Center for Research on Education Outcomes, or Credo. Overall, NHA was among the top 20 percent of schools surveyed, ranking in the 84th percentile and outperforming more than four-fifths of the other charter school systems studied (CREDO, 2017). <https://credo.stanford.edu/pdfs/CMO%20FINAL.pdf>

State	School	Address	City, State, Zip	Geographic District	Authorizer	Opening Year	Grades Served	2017-18 Academic Performance					
								Enrollment	FRL	School ELA Proficiency	District ELA Proficiency	School Math Proficiency	District Math Proficiency
OH	Winterfield Venture Academy	305 Wenz Rd	Toledo, OH 43615-6244	Toledo City	Educational Service Center of Lake Erie West	2004	K - 8	583	100%	30%	37%	43%	35%
OH	Bennett Venture Academy	5130 Bennett Rd	Toledo, OH 43612-3422	Toledo City	Buckeye Community Hope Foundation	2005	K - 8	688	100%	37%	37%	43%	35%
OH	Stambaugh Charter Academy	2420 Donald Ave	Youngstown, OH 44509-1306	Youngstown City Schools	Buckeye Community Hope Foundation	2006	K - 8	457	100%	39%	31%	55%	25%
MI	Taylor Exemplar Academy	26727 Goddard Rd	Taylor, MI 48180-3912	Taylor School District	Bay Mills Community College	2006	K - 8	797	72%	46%	23%	36%	19%
MI	Flagship Academy	13661 Wisconsin St	Detroit, MI 48238-2356	Detroit Public Schools Community District	Central Michigan University	2007	K - 8	698	98%	19%	12%	12%	7%
CO	Landmark Academy at Reunion	10566 Memphis St	Commerce City, CO 80022-6236	Brighton 27J	Brighton School District SD 27J	2007	K - 8	746	16%	49%	36%	50%	30%
IN	Aspire Charter Academy	4900 W. 15th Ave	Gary, IN 46406-2308	Gary Community School Corp	Ball State University	2008	K - 8	694	94%	45%	29%	30%	17%
MI	Reach Charter Academy	25275 Chippendale St	Roseville, MI 48066-3960	Roseville Community Schools	Grand Valley State University	2008	K - 8	654	86%	34%	16%	17%	10%
MI	Achieve Charter Academy	3250 Denton Rd	Canton, MI 48188-2110	Van Buren Public Schools	Grand Valley State University	2009	K - 8	765	14%	79%	61%	75%	60%
NY	Brooklyn Scholars Charter School	2635 Linden Blvd	Brooklyn, NY 11208-4907	NYC Geog. District 19	New York City Department of Education	2009	K - 8	697	91%	49%	30%	42%	25%
MI	Lansing Charter Academy	3300 Express Ct	Lansing, MI 48910-4370	Lansing Public School District	Bay Mills Community College	2009	K - 8	546	88%	25%	19%	20%	13%
MI	Quest Charter Academy	24745 Van Born Rd	Taylor, MI 48180-1221	Taylor School District	Central Michigan University	2009	K - 8	772	72%	40%	23%	33%	19%
GA	Atlanta Heights Charter School	3712 Martin Luther King Jr Dr SW	Atlanta, GA 30331-3674	Atlanta Public Schools	Georgia Charter Schools Commission	2010	K - 8	761	93%	21%	37%	23%	36%
NY	Brooklyn Dreams Charter School	259 Parkville Avenue	Brooklyn, NY 11230-1310	NYC Geog. District 22	SUNY Charter Schools Institute	2010	K - 8	619	84%	46%	49%	43%	46%
CO	Foundations Academy	340 S 45th Avenue	Brighton, CO 80601-4652	Brighton 27J	Brighton School District SD 27J	2010	K - 8	754	19%	40%	36%	43%	30%
LA	Inspire Charter Academy	5454 North Foster Drive	East Baton Rouge, LA 70805	East Baton Rouge Parish	East Baton Rouge Parish School Board	2010	K-8	635	91%	22%	40%	23%	31%
MI	Legacy Charter Academy	4900 E Hildale Street	Detroit, MI 48234-2225	Detroit Public Schools Community District	Grand Valley State University	2010	K - 8	749	98%	25%	12%	23%	7%
NY	Riverton Street Charter School	118-34 Riverton Street	St. Albans, NY 11412-4024	NYC Geog. District 29	New York City Department of Education	2010	K - 8	963	79%	52%	40%	51%	31%
MI	East Arbor Charter Academy	6885 Merritt Road	Ypsilanti, MI 48197-8958	Ypsilanti Community Schools	Grand Valley State University	2011	K - 8	696	48%	51%	29%	37%	23%
WI	Milwaukee Scholars Charter School	7000 West Florist Ave	Milwaukee, WI 53218-1855	Milwaukee Public Schools	University of Wisconsin-Milwaukee	2011	Y4 - 8	714	100%	13%	19%	15%	16%
MI	Regent Park Scholars Charter Academy	15865 East 7 Mile	Detroit, MI 48205-2545	Detroit Public Schools Community District	Lake Superior State University	2011	K - 8	750	97%	17%	12%	8%	7%
MI	South Canton Scholars Charter Academy	3085 S. Canton Center Rd	Canton, MI 48188-2452	Wayne-Westland Community School District	Grand Valley State University	2011	K - 8	781	27%	72%	61%	64%	60%
MI	Plymouth Scholars Charter Academy	48484 N Territorial Road	Plymouth, MI 48170-2850	Plymouth-Canton Community Schools	Bay Mills Community College	2012	K - 8	771	14%	77%	61%	76%	60%
MI	River City Scholars Charter Academy	944 Evergreen Street SE	Grand Rapids, MI 49507-2051	Grand Rapids Public Schools	Bay Mills Community College	2012	K - 8	477	94%	24%	25%	16%	17%
MI	South Pointe Scholars Charter Academy	10550 Geddes Road	Ypsilanti, MI 48198-9442	Ypsilanti Community Schools	Northern Michigan University	2012	K - 8	757	51%	54%	22%	42%	16%
MI	Oakside Scholars Charter Academy	355 Summit Dr	Waterford, MI 48328	Pontiac City School District	Bay Mills Community College	2013	K - 8	741	94%	22%	14%	17%	11%
NC	Summerfield Charter Academy	5303 US 220 N	Summerfield, NC 27358	Guilford County Schools	North Carolina State Board of Education	2013	K - 8	777	15%	79%	52%	83%	50%
LA	Advantage Charter Academy	14740 Plank Road	Baker, LA 70714	City of Baker School District	Board of Elementary and Secondary Education	2014	K-8	659	87%	24%	19%	19%	10%
MI	Grand River Academy	28111 Eight Mile Road	Livonia, MI 48152	Clarenceville School District	Grand Valley State University	2014	K - 8	789	50%	42%	55%	34%	46%
NC	Wake Forest Charter Academy	1851 Friendship Chapel Road	Wake Forest, NC 27587	Wake County Schools	North Carolina State Board of Education	2014	K - 8	769	14%	75%	65%	76%	63%
LA	Willow Charter Academy	1818 Northeast Evangeline Thruway	Lafayette, LA 70501	Lafayette Parish	Board of Elementary and Secondary Education	2014	K - 8	616	92%	17%	47%	15%	41%
NC	Winterville Charter Academy	4160 Bayswater Rd	Winterville, NC 28590	Pitt County Schools	North Carolina State Board of Education	2015	K - 8	597	47%	57%	51%	55%	51%
NC	Gate City Charter Academy	123 Flemingfield Rd	Greensboro, NC 27405	Guilford County Schools	North Carolina State Board of Education	2016	K - 7	667	79%	45%	52%	47%	50%
NC	Matthews Charter Academy	2332 Mt. Harmony Church Rd	Matthews, NC 28105	Charlotte-Mecklenburg Schools	North Carolina State Board of Education	2016	K - 8	763	37%	65%	55%	58%	60%
NC	Peak Charter Academy	1601 Orchard Villas Ave	Apex, NC 27502	Wake County Schools	North Carolina State Board of Education	2017	K - 8	686	9%	77%	65%	79%	63%
NC	Johnston Charter Academy	40 Scholar Dr	Clayton, NC 27520	Johnston County School District	North Carolina State Board of Education	2018	K - 7	632	N/A	N/A	N/A	N/A	N/A
NC	Rolesville Charter Academy	908 Eagle Scholars Dr	Rolesville, NC 27521	Wake County Schools	North Carolina State Board of Education	2018	K - 6	580	N/A	N/A	N/A	N/A	N/A
MI	Pembroke Academy	19940 Mansfield St	Detroit, MI 48235	Detroit Public Schools Community District	Central Michigan University	2018	K - 5	244	N/A	N/A	N/A	N/A	N/A
MI	Westfield Charter Academy	K-6: 27201 W. Chicago	Redford, MI 48239	South Redford School District	Grand Valley State University	2019	K - 6	N/A	N/A	N/A	N/A	N/A	N/A
CO	Mountain View Academy	TBD	Colorado Springs, CO	Falcon School District 49	Falcon School District 49	2020	K-5	N/A	N/A	N/A	N/A	N/A	N/A

Since 1995, all NHA-partner schools have successfully applied for and been granted renewal of their charters on all but one occasion. Rochester Leadership Academy Charter School in Rochester, New York in 2005 due to not meeting its charter goals.



Appendix P: Required Signed and Notarized Documents

Oak Grove Charter Academy

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:

Philip Adams

- Date of Review: August 14, 2019

- Signature of Board Members Present (Add Signature Lines as Needed):

■ [Signature]
 ■ [Signature]
 ■ [Signature]
 ■ [Signature]

- ❖ 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: Plante Moran

- Date of Review: August 14, 2019

- Signature of Board Members Present (Add Signature Lines as Needed):

■ [Signature]
 ■ [Signature]
 ■ [Signature]
 ■ [Signature]






State of NC, County of Durham
 Signed before me on this 14th day
 of August, 2019 by Tyishia Edwards
 Notary Public Tyishia Edwards
 My commission expires 12-23-2019



- ❖ 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 Selected EMO/CMO:
National Heritage Academies, Inc., a Michigan corporation
- Date of Review: August 14, 2019


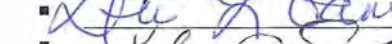



- Signature of Board Members Present (Add Signature Lines as Needed):

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- ❖ 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: *Not applicable – EMO will provide these services*
- Name of the Selected Financial Service Provider:
- Date of Review:






- Signature of Board Members Present (Add Signature Lines as Needed):

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- ❖ 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: *Not applicable – EMO will provide these services*
- Name of the Selected PowerSchool Service Provider:
- Date of Review:

- Signature of Board Members Present (Add Signature Lines as Needed):

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State of NC, County of Durham
Signed before me on this 14th day
of August, 2019, by Tyisha Edwards
Notary Public Tyisha N. Edwards
My commission expires 12-29-2019

