

NORTH CAROLINA CHARTER APPLICATIONS



NC Public Charters

Organization Information

Organization Name *

Pathways In Education-North Carolina

Email *

nicholasperez@pathwaysedu.org

Telephone *

773-230-0343

Fax

626-628-3694

Address *

320 North Halstead Street

Unit/Suite

Zip Code *

91107

City *

Pasadena

State *

California

Application Type *

Standard

Proposal Type *

Standard

Operator Type *

EMO/CMO



Primary Contact Name

Nicholas Perez

Has the School Leader Been Identified?

Yes No

Do you have any Corporate Partnerships?

Yes No

Proposed Leader Name *

Proposed School Leader Current Job/Position *

List any principal/leadership programs the proposed leader is currently enrolled in or have completed

Opening Year *

2022

Enrollment Projections

Grade Level	Year 1	Year 2	Year 3	Year 4	Year 5	Year at capacity
Grade 12	75	150	150	150	150	75
Grade 11	75	150	150	150	150	75
Grade 10	75	150	150	150	150	75
Grade 9	75	150	150	150	150	75

Team Members Roaster

Name	Title	Position	Email Address
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Board Members Roaster

Name	Street Address	Zip Code	Email	Expertise
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NORTH CAROLINA CHARTER APPLICATIONS
NC Public Charters



Name	Street Address	Zip Code	Email	Expertise
Alvin D. Wallace	4022 Barclay Forest Dr	28213	adwallace11@yahoo.com	Finance
Lamont L. Smith	2031-B El Verano Circle.	28210	lamont_smith_dc@yahoo.com	Strategic planning and Human relations
Linda P. Marks Thomas	8615 Getalong Rd	29213	lptgm@aol.com	Professional Development
Patricia McClean Wright	3203201 Burbank Drive	28216	Patrice.wright@CMS.K12.NC.US	College and Career
Queen Norwood Thompson	4933 Lawrence Orr Rd	28212	queencharlotte33@bellsouth.net	Federal compliance and coordinated services for special populations
James H. Wilkes, Jr.	6721 Barton Creek Dr	27377	elderjhw@icloud.com	Bussiness Administrations and Management
Tara S. Gibbs	9224 Kings Parade Boulevard Unite 2313	28273	revtaragibbs@gmail.com	Education and Community Engagement
Kathleen Hoskin Tunson	1918 Mountain Park Dr. Charlotte, NC	28214	ktunson@gmail.com	Marketing Manager/Project Manager



1. Application Contact Information

Q1. Organization Type

- Municipality
 Nonprofit Corporation

Q2. Name of the nonprofit organization

Pathways Management Group, Inc.

Evidence :


Pathways Management Group_...

Q3. Has the organization applied for 501C3 nonprofit status?

- Yes
 No

Q4. **The next few questions will** inquire about the person who will serve as the primary contact for this Application. The primary contact will serve as the contact for follow-up, interviews, and notices regarding this Application.

Please provide the Primary Contact's Title/Relationship to Non-Profit

Nicholas Perez, Lead Petitioner

Q5. Primary Contact's

Mailing Address City, State, Zip

320 N. Halstead St.

Pasadena, CA 91107

Q6. Primary Contact's Primary Telephone Number

626-921-8200

Q7. Primary Contact's Alternate Telephone Number

773-230-0343 (Cell phone)

Q8. Geographic County in which charter school will reside

Mecklenburg County

Q9. LEA/District Name

Charlotte-Mecklenburg Schools (CMS)



Q10. Projected School Opening Month

August 2022

Q11. Will this school operate on a year-round schedule?

- Yes
- No

Q12. Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan outlined above.

Grade Level	Number of Students (Year 2+ Reflects Second Location)					At Capacity 2022-2023 (One Site)
	Year 1 2022- 2023	Year 2 2023- 2024	Year 3 2024- 2025	Year 4 2025- 2026	Year5 2026- 2027	
K						
1						
2						
3						
4						
5						
6						
7						
8						
9	75	150	150	150	150	75
10	75	150	150	150	150	75
11	75	150	150	150	150	75
12	75	150	150	150	150	75
Totals	300	600	600	600	600	300

Pathways In Education-North Carolina (PIE-NC) plans to use an education model that has proven successful in helping at-risk, disconnected, and underserved students—throughout multiple locations across the country—complete their high school education. It is anticipated the school will achieve the enrollment projections of 300 students (at both locations) each year. This projection includes the school's first year, and it anticipates equal distribution among all four grade levels served as PIE-NC will be a resource to at-risk and disconnected youth populations throughout the high school timeline. Using the marketing strategies and recruitment efforts detailed in this application, PIE-NC will ensure enrollment numbers are met and will also have a contingency plan in place in the event the school is under-enrolled. This enrollment effort includes partnerships with local community leaders, organizations, schools, and businesses. PIE-NC will work with local Mecklenburg County high school teachers and counselors to identify and enroll students through referrals. PIE-NC received a letter of support from Dorothy W. Able, owner and director of An Angel's Touch Youth Enrichment Program, expressing that she sees the charter school as a strong partner in helping the city's disconnected and underserved youth reach their full potential.

Q13. Projected Enrollment Demographics

Q14. Certification of Originality

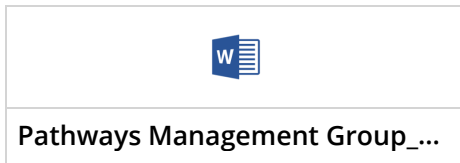


7. EMO/CMO

Q15. Name of the EMO/CMO

Pathways Management Group, Inc.

Evidence :



Q16. EMO/CMO

Mailing Address

City State Zip

320 N Halstead Street

Pasadena, CA 91107

Q17. EMO/CMO Phone Number

626-375-7555

Q18. EMO/CMO Contact Person

Kristi Duenas

Q19. EMO/CMO Email Address

kristiduenas@pathwaysmg.org

Q20. EMO/CMO Website

<https://pmgcmo.org/> (<https://pmgcmo.org/>)

Q21. Explain how the contract with the specified EMO or CMO will be in the best educational and financial interest of the charter school

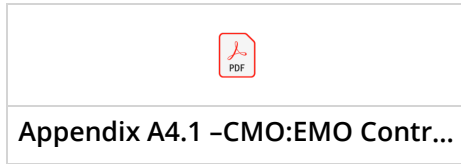
One of the duties of the charter management organization (CMO) is to ensure that all PIE schools receive clean external audits and submit in a timely manner all required financial reports to districts and government agencies on an annual basis. No charter school managed by PMG has received a material audit finding, performance deficiency, or compliance violation leading to authorizer intervention. Therefore, without the obstacles of having issues with external audits or performance deficiencies, this will allow PIE-NC to function well financially and educationally.



Q22. **Attach Appendix A4.1: Executed Management Contract**

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Evidence :



Q23. **What other EMO/CMOs were pursued and why did the applicant select this one? Please include information regarding other management organizations' fees and financial/academic records that led to the selection of the proposed EMO/CMO as the best fit for this proposed school**

PIE-NC is designating Pathways Management Group (PMG), a 501(c) (3) nonprofit corporation, as its Charter Management Organization (CMO) in this application. PIE-NC has selected PMG

because of their extensive experience supporting schools with the Pathways In Education model. PIE-NC believes that PMG is uniquely equipped to serve the target population (at-risk, underserved, and disconnected youth) in Charlotte- Mecklenburg. PIE-NC Board of Directors has conducted independent research, as well as conducted interviews with the Pathways In Education-Louisiana (PIE- LA) board members and representatives, in order to have a comprehensive understanding of past and present CMO practices.

PIE- NC and PMG will negotiate the terms of a management contract pursuant to which PMG will be responsible for accounting, human resources, marketing, facilities maintenance, property management, program development, instructional development and training, instructional supervision, recruiting, faculty, and staff. Any contracts entered into for such services will ultimately be approved by and overseen by PIE-NC's independent board of directors and will comply with PIE-NC's procurement policy as well as I.C. § 67-2801. PIE-NC Board of Directors will be responsible for monitoring PMG's performance as its CMO and will have the right to terminate the contract for cause—a term that will be defined in the contract. For more information on the criteria in which the board will use to evaluate the performance of PMG.

PMG has a strong infrastructure to ensure provision of high-quality services that support mission-driven schools in maintaining a singular focus on student success. The role of PMG is to employ a Chief Academic Officer and School Implementation Team to provide support for school startup, educational model, assessment, accountability, and professional development; a Director of Human Resources and a full



human resources team to manage all hiring, employment benefits, and personnel-related services; and a Chief Financial Officer and full finance department to manage the school budget, financial reporting, payroll, procurement policies, and other financial matters.

The draft Management Services Agreement between PMG and PIE-NC can be found in Appendix F11: Draft PIE-NC/PMG Management Agreement. PIE-NC Board of Directors will review the draft of the service agreement and revise as necessary to meet PIE-NC's interests and needs. More information regarding PMG is included in the "Charter Management Organization" section of this petition.

Q24. Provide and discuss student performance, governance performance and financial data from other schools managed by the management company to demonstrate how this organization is a good fit for the targeted student population. Nationally, what are the highest and lowest performing schools of the EMO/CMO? Why are these two schools so different in overall achievement?

The average PIE student enrolls in one of the schools between two and four semesters of credits behind their graduate cohort peers. Additionally, students are coming to PIE schools between two and five years behind their national peers in reading and math skills. Despite these gaps, almost half of the students rapidly recover deficient credits and return to their district school. The PIE model has proven to be instrumental in students' quick recovery of academic credits, increasing performance on state standardized tests, and producing high school graduates in numbers that far surpassed the options students had in the traditional education system whether students decide to return to a district school or remain at a PIE school site.

The below table represents metrics for one of the indicators that both schools share. RenStar Reading and Math SGP show student growth compared to a national norming sample. Students are given the test in the fall and this score is used to categorize students and compare growth on subsequent tests to a similar norming sample. The results are put on a 1-99 scale with internal goals set at a score of 45 or higher.



	Reading (SGP≥45)			Math (SGP≥45)		
	2017-18	2018-19	2-Year Growth	2017-18	2018-19	2-Year Growth
Nampa, ID	45.3%	64.5%	19.2%	40.8%	68.5%	27.7%
Chicago, IL						
Ashburn	42.2%	43.1%	1.0%	47.8%	44.6%	-3.2%
Avondale	45.7%	67.9%	22.2%	38.1%	48.1%	10.0%
Brighton Park	56.5%	56.6%	0.1%	45.6%	53.1%	7.5%
Memphis, TN						
Frayser	44.2%	34.8%	-9.4%	33.3%	38.6%	5.3%
Whitehaven	37.7%	38.7%	1.1%	38.6%	31.2%	-7.4%

PIE has two charter schools (Nampa, ID and Chicago, IL) that are excellent examples of schools that PIE-NC would like to establish in North Carolina. These schools make up over 60 percent of the CMO’s total student population outside of California and are, therefore, more of the rule than the exception in terms of success. PIE-NC will use Illinois as the highest performing school since it has operated longer (12 years vs. four years for Pathways In Education-Idaho), and the students demographics and socioeconomics are more aligned with the target demographic in North Carolina than the Idaho school. The Pathways In Education-Tennessee (PIE-TN) schools are examples of schools that need most improvement based both on its performance and similarity to the student population in North Carolina.

Pathways In Education-IL (PIE-IL) schools received scores of 1 (Avondale and Brighton Park) and 2+ (Ashburn) in the most recent release of local Options Schools SQRP accountability ratings, and their contracts with Chicago Public Schools (CPS) schools was recently renewed during the 2018-19 SY with permission to expand by a school campus. Both ratings qualify for a “Good Standing” designation from CPS (SQRP overview located (https://cps.edu/Performance/Documents/SQRP_Overview.pdf)here. (https://cps.edu/Performance/Documents/SQRP_Overview.pdf)) PIE-TN received average scores of 2.1 out of 4 for its Frayser campus (results (<https://reportcard.tnk12.gov/districts/985/schools/45/page/SchoolOverall>))here



(<https://reportcard.tnk12.gov/districts/985/schools/45/page/SchoolOverall>) and 1.3 for its Whitehaven campus (located (<https://reportcard.tnk12.gov/districts/985/schools/50/page/SchoolOverall>)) here (<https://reportcard.tnk12.gov/districts/985/schools/50/page/SchoolOverall>)).

PIE-NC has contrasted the two charter schools and feels there are two areas that are most related to the difference in school performance. The first is leadership stability.

The four Illinois campuses have had two principals in the past four school years, and there has been a low turnover rate at the assistant principal (AP) and teacher levels as well. This stability has allowed for a consistent culture, messaging, and high staff morale overall. PIE-TN has had four principals in the past three school years to go along with high turnover at the AP and teacher levels.

The second area of contrast surrounds academic expectations and consistency of messaging at the district and state levels. CPS has been a close and dependable partner for PIE-IL schools in terms of support, oversight, and expectations. The two parties have consistent contact with access to a wealth of information and support structures. These include CPS-provided wraparound services, staff professional development, and student referrals. The accountability model and academic expectations have also been consistent over the past six years with only minor revisions and updates on a yearly basis. By comparison, the Achievement School District (ASD) has seen its role in governing charters drastically shift in the past three years with major staffing changes, shifting priorities, and adjustments to its oversight practices.

Moreover, problems with standardized testing (not related to COVID but instead due to major vendor issues at the state levels over the previous two school years), multiple accountability models, and an uncertainty surrounding the role of ASD has contributed to both achievement results and staff turnover. PIE-TN has discussed the continuing issues surrounding student and school results and feels issues at the school are being addressed. Also, quality leadership is in place, which will allow for high levels of success in the near future.

Due to these proven metrics of success, as well as PMG's aforementioned years of demonstrated academic, operational, and fiscal responsibility, the board has chosen PMG as an ideal CMO for the program. In addition to managing other PIE schools, PMG also has a history of partnering with local school districts and charter schools to recover students who have dropped out; and support successful



completion of their high school diploma, enrollment in college, or pursuit of career opportunities. It also offers support to students with the same levels of rigor and accountability as those adhered to by traditional public high schools.

Q25. Describe how the governance structure will be affected, if at all, by the EMO/CMO, and particularly discuss how the board of directors of the charter school will govern the school independently of the EMO/CMO.

PIE-NC's governance structure will not be affected by its partnership with PMG. PIE-NC shall be governed by a board of directors. The school leader will answer directly to the board and serve at the discretion of the board. He or she will make decisions on a daily basis and fulfill all administrative duties for the school.

The board is responsible for ensuring all school policy decisions support the effective implementation of the charter school's academic program. This includes providing quality student instruction and corresponding achievement, adopting appropriate school policies, reviewing the charter school's financials, overseeing student discipline (suspensions/expulsions), monitoring organizational programming performance, and making certain other policy considerations are implemented as needed or as mandated by North Carolina and/or the federal law. Ultimately, the governing body is responsible for overseeing the academic program's effectiveness, the charter school's fiscal performance, and guaranteeing the charter school is faithful to its mission.

The board will ensure PIE-NC meets the expectations outlined in the charter school Performance/Legislation (NCDPI 2018, par. 23). It is the exclusive body responsible for school policy and shall be dedicated to both the education of the school's student population and the successful operations of the charter school, with G.S. 115C-238.29A et seq. All citations are referenced in Appendix O in the section titled "References."

Q26. Provide a description of the relationship that will exist between the charter school employees and the Management Organization

The relationship is a client/vendor relationship. The vendor is PMG, and PIE-NC is the client. PMG shall provide support in the areas of academics, finance, human resources, facilities, special education, and assist with the recruitment and hiring process of the charter school's instructional staff. The instructional staff will remain employees of the school. In the event the CMO agreement is terminated, PIE-NC will locate another CMO or vendor to provide such services. As approved by PIE-NC's Board of Directors and contracted for services, PMG will help manage the school's daily operations pursuant to a management agreement for such services. This relationship is covered by the CMO agreement located in Appendix A4.3.



Q27. Explain how the contract includes measurable objectives whereby the charter school board can evaluate annually the performance of the EMO/CMO, and if necessary, terminate the contract without significant obstacles

PMG will provide the following: monthly report of reimbursable expenses, monthly ADA/ADM or student attendance reports, DPI required reports, budget reports, and a year-to-date budget variance report. Upon request, PMG shall provide additional financial data and other data to PIE-NC in a format and structure directed by PIE-NC. The charter school will have the right to conduct an independent audit of PMG's finances, using a certified public accountant of its choosing. PMG must be given a minimum notice of 15 days, and the audit is limited to only PMG's financial and other records related to the operation of PIE-NC. In the event of breach of the management agreement with PMG, PIE-NC can exercise its rights as outlined in the CMO agreement - Article 15: Termination and Closure, which includes specific terms for cause, related time requirements, and financial responsibilities.

Specifically, the management agreement defines material breach to include failure of PMG to provide services as required or any other act or failure to act by PMG, which undermines the joint purpose of the agreement. PIE-NC must provide PMG with a written notice of the material breach and allow PMG a reasonable period (90 days) in which to remedy such breach. Thereafter, if PIE-NC can show good cause the remedial action taken by PMG is unsatisfactory, PIE-NC may terminate the agreement under the procedures further outlined in Section 15.4 of the CMO agreement. In the event of a dissolution of the aforementioned management agreement, PIE-NC and PMG will ensure the protection of sensitive student data in full compliance with the law.

Public assets purchased in whole or in part with governmental funds will be for the benefit of the students of PIE-NC and remain the property of PIE-NC should the management relationship ever be terminated. If a physical asset was purchased for PIE-NC by PMG and the CMO agreement was terminated, then PMG would return the physical assets to a PIE-NC school campus. Though PMG will assist with the recruitment and hiring process of the charter school's instructional staff, the instructional staff will remain employees of the school.

Q28. Is the facility provided by the EMO/CMO?

- Yes
- No

Q29. Attach Appendix A4.2 Facility Buyout Agreement, if applicable

Not applicable. PMG has not managed any schools in North Carolina.




Upload Required

File Name: Appendix A4.2 Facility Buyout Agreement File Type: pdf, image, excel, word, text

Max File Size: 50 Mandatory: No

Comments :

Evidence :


Appendix A4.2 – EMO:CMO Facili...


Q30. List the fund balance and surpluses for each school managed by the EMO/CMO over the last three years in North Carolina.

Not applicable. PMG has not managed any schools in North Carolina.

Q31. Attach Appendix A4.3: EMO/CMO Financial History Provide as Appendix A4.3 the financial history and statements of the EMO/CMO over the last three years. Specifically, if contracting with an EMO, provide confirmation that the EMO is in good standing by providing bank statements from the prior three years.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 5


Evidence :


Appendix A4.3 – EMO:CMO Fina...

Q32. Attach Appendix A4.4: IRS Form 990 Provide as Appendix A4.4 the IRS Form 990 (or equivalent documents if the organization does not file a 990) for the prior three years

Upload Required File Type: pdf, image, word Max File Size: 30 Total Files Count: 10

Evidence :


Appendix A4.4 – IRS Form 990 .pdf



8. General-Mission Purposes, and Goals

8.1. Mission and Vision

Q33. The mission statement of the proposed charter school is as follows (35 words or less)

PIE-NC will provide educational programs (partnering with school districts) and support to high school students, enabling them to graduate from high school prepared for postsecondary education and a 21st century workforce.

Q34. What is the vision of the proposed school? What will the school look like when it is achieving the mission?

Students in the Charlotte-Mecklenburg Schools (CMS) boundaries will have the choice to enroll in PIE-NC—where every student is given a quality high school education and access to postsecondary education and careers. Students will have career technical education (CTE) opportunities, which deepens their connection to school, fosters lifelong learning, and graduates productive members of society. PIE-NC's core values of mutual trust, mutual respect, compassion, resilience, and integrity support the mission and vision. The makeup of the student body will reflect the racial demographics and vulnerable communities of the CMS system. PIE-NC will be a school in which students achieve academic success by focusing on dropout recovery, preparing for post-high school endeavors (postsecondary education and career), and practicing PIE-NC's core values in their daily lives.

Q35. Provide a description of Targeted Population in terms of demographics. In your description, include how this population will reflect the racial and ethnic composition of the school system in which it is located. Additionally, how it will reflect the socioeconomic status of the LEA, SWD population, and ELL population of the district? See G.S. 115C-218.45(e).

The 2019 demographic data for CMS reflects the following racial demographics (Niche 2019, page 1):

African American 38.1%

White 28.1%

Hispanic 24.1%

Asian 6.6%

Native American 2.5%

Multiracial 2.5%

Pacific Islander 0.1%



The target population is at-risk and disconnected students in Mecklenburg County (West Charlotte and Sugar Creek) who may be:

- Credit deficient
- Uncertain about their career path
- Interested in CTE
- Desire dual-certification and a progressive curriculum approach
- Plan to attend a two or four-year college after graduation
- Want to immediately enter the workforce after graduating from high school with a CTE certification (N.C. Gen. Stat. Ann. § 115C-156.2)

PIE-NC's curriculum is suitable for every student, and the student body will reflect the racial demographics of the CMS system because PMG oversees recruitment efforts that are focused on diversity and equity through inclusive marketing efforts. The target demographic will reflect the socioeconomic status (SES) of the LEA, students with disabilities (SWD) population, and English Language Learners (ELL) represented in the area. All citations are referenced in Appendix O in the section titled "References."

Q36. What are the enrollment trends and academic performance outcomes of surrounding schools in the selected community? What elements of your educational model will meet the needs of your target student population?

Charter schools are needed to expand the district's capacity to meet and provide an enhanced choice to the ever-growing student population in the Charlotte Mecklenburg area (Helms 2018, par. 4). PIE-NC will also focus on CTE and a skilled workforce, which would benefit the growing local economy. PIE-NC will provide students with a solid CTE program that will place them on a path to achieving their academic, career, and life goals upon graduation. Students need flexibility, direct support, and rigor in order to close achievement gaps. PIE-NC's multiple learning modalities along with built-in support structures help quickly transition students back into learning and productivity so that they can begin to close achievement and credit gaps when compared with their peers. PIE-NC's instructional model encourages student-driven achievement of learning goals and continuous improvement of student academic performance.

The instructional design of the program will include:

- Individualized Learning Plan (ILP)
- Small Group Instruction (SGI)



- Focused learning and subject matter concentration
- Multi-Tiered Systems of Support (MTSS)
- Targeted interventions
- Online learning (OL)
- Independent Study (IS)
- Experiential learning

All citations are referenced in Appendix O in the section titled “References.”

Q37. What will be the total projected enrollment at the charter school and what percentage of the Average Daily Membership (ADM) does that reflect when compared to the Local Education Agency (LEA) of the same offered grade levels? (i.e. If the proposed school will be grades 9-12, only compare the total enrollment to the total enrollment of the LEA in grades 9-12).

PIE-NC will serve up to 300 students the first year, at its first location, and will serve an additional 300 students by the second year at the second location. This is approximately 1.35 percent of the potential ADM (0.67 percent in one year).

Q38. Summarize what the proposed school will do differently than the schools that are now serving the targeted population. What will make this school unique and more effective than the currently available public-school options?

PIE-NC offers students the opportunity to earn a diploma outside of a traditional public high school setting, with the opportunity to also earn college and/or career course credits. The PIE model has a proven history of closing the achievement and graduation gap for at-risk students. The increased graduation rates—combined with career readiness training and industry recognized credentials—prepare students to meet the needs of employers.

CTE dual enrollment is an option for students to earn industry-recognized certifications, which count as credits toward a high school diploma. This option is available for students seeking a certificate or degree and industry-recognized certification through a career education program or course. Students will be offered work-based learning opportunities in apprenticeship/internship, business/industry field trips, cooperative education, entrepreneurial experiences, job shadowing, mentorship, school-based enterprise, and service learning. Dual enrollment is an important strategy in workforce development as some technical classes will be offered by community college partners. Students will understand they can pursue a career and higher education simultaneously; the two goals are not mutually exclusive.



According to the article, "Current Practices & Policies on Dual Credit Admissions in Illinois' 4-Year Colleges & Universities," by Julia Panke Makela, dual credit not only introduces students to college-level course work, but it enables them to simultaneously earn credit toward their high school and college transcripts. The results from an Illinois state study showed that institutions enrolled almost 50 percent of the state's four-year undergraduate students. (2005, pages 1-4). In a report titled, "What Works Clearinghouse Intervention Report: Dual Enrollment Programs," by the U.S. Department of Education, participation in dual enrollment has shown strong correlations with improved graduation rates, college enrollment numbers, and degree attainment. Supportive dual enrollment options have also been shown to increase college completion for low SES students by 12 percent.

The majority of PIE students come from predominantly low SES communities. PIE's evidence-based program is designed to increase graduation rates and college and career success through dual enrollment partnerships with local community colleges. All citations are referenced in Appendix O in the section titled "References."

Q39. Describe the relationships that have been established to generate support for the school. How have you assessed demand for the school? Briefly describe these activities and summarize their results

The board of PIE-NC is hard at work cultivating long-term relationships with community-based organizations, workforce development agencies, businesses, individuals, foundations, and community groups and leaders. PIE- NC board members have begun community outreach to determine the needs and interests for the school as well as discuss potential partnerships. The following organizations have expressed interest in having PIE-NC established in the community: YMCA, Charlotte Bridge Home, Good Fellow Club, Charlotte-Mecklenburg Youth Council, LEVEL UP Youth Program, Right Move for Youths, Say Y.E.S Mentoring & Leadership, Big Brother and Big Sisters, Youth Development Initiatives, Youth Villages, and the Boys and Girls Club. The board will continue engaging stakeholders from the community through surveys, public meetings, and collaborative efforts around services for the school's at-risk and disconnected youth population. With its distinct education model, PIE-NC is a practical and realistic educational option for students in the West Charlotte corridor.

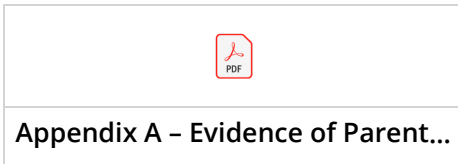
Q40. Attach Appendix A: Evidence of Community/Parent Support.

Provide evidence that demonstrates parents and guardians have committed to enrolling their children in your school. You must provide evidence through a narrative or visual of this educational need through survey data, or times and locations of public meetings discussing this proposed charter school. (Please do not provide more than one sample survey form).

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 5



Evidence :



8.2. Purposes of the Proposed Charter School

Q41. In one page or less, describe how the proposed charter school will achieve one or more of the six legislative purposes, as specifically addressed in the NC charter school statute GS 115C-218, and the proposed school's operations..

The Six Legislative Purposes of a Charter School are:1. Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site.2. Hold schools accountable for meeting measurable student achievement results.3. Provide parents and students with expanded choices in the types of educational opportunities that are available within the public-school system.4. Improving student learning.5. Increasing learning opportunities for all students, with a special emphasis on at-risk or gifted students.6. Encourage the use of different and innovative teaching methods.

PIE-NC will achieve the intent of the legislative purposes addressed in the NC charter school statute GS 115C-218 in the following ways:

4. The mission and methodologies are designed to improve student learning (particularly for those who are behind and need to recover credits) and address students' needs—both academic and to remove other barriers to learning—in a highly individualized way. The school will use a variety of instructional models like SGI, IS, and OL and a variety of methodologies that demonstrate an understanding of different learning styles to best cater to each student's needs. Teachers will frequently assess students' knowledge and have access to real-time data, ensuring that every student has the opportunity to improve learning outcomes.

5. All teachers will have specific experience that qualifies them to work with at-risk youth populations (students with disabilities and 504 Plans, ELs, students at risk of dropping out) as well as students facing other barriers, including low SES, housing insecurity, justice involvement, pregnant or teen parenting, and being a foster youth. Teachers will be trained to identify what is hindering students and connect them to the right resources to support their success. Academically or Intellectually Gifted (AIG) students often develop asynchronously and need teachers who have a background educating this population and understand their needs—helping them advance in subjects where they are particularly talented and



spending time in grade-level areas that may be more challenging. Many gifted students have complex social emotional learning (SEL) needs that must be met to ensure their success. PIE-NC teachers understand the tremendous potential of these students while recognizing that numerous factors—including boredom, perfectionism, and behaviors impact the likelihood of their success.

6. PIE-NC will empower teachers to deliver content in a variety of creative ways. The focus on multi-sensory instruction, based on unique learning styles through the Quantum Learning (QL) multi-sensory framework, encourages teaching that incorporates visual, auditory, and kinesthetic components.

8.3. Goals for the Proposed Charter School

Q42. Provide specific and measurable goals for the proposed school for the first 5 years of operation outlining expectations for the proposed school's operations, academics, finance, and governance. Address how often, who, and when the information will be communicated to the governing board and other stakeholders.

Operations Goals

- Remain in compliance with all charter school laws, state and federal laws, and board of education policies.
- Meet expected enrollment figures as shown in the charter school application for the first five years.
- Provide professional development activities (in areas of identified interests and needs) annually.
- Have a student body that reflects the economic and racial diversity of the community by year five.

Academic Goals

- Students will be supported, active, and engaged learners achieving stable and steady average daily student participation.
- Annual student attrition rate will be less than 10 percent.
- PIE-NC will assist with credit recovery and strive to have a low suspension rate that is equitable among student demographics. In recognition of the challenges CMS has faced with higher short-term suspension rates among minority students (Hui 2020, par. 8), PIE-NC will specifically employ discipline practices that



do not divert students away from their education. Such practices include, but are not limited to, Positive Behavior Intervention Supports (PBIS), objective threat assessment, restorative justice, and community service (Hoffman et al. 2016, pages 4-26).

-Student dropout rate will decrease, and students will graduate with a high school diploma and a certificate of completion in at least one CTE curriculum area.

-On state administered tests, students will achieve proficiency in one or more areas.

Financial Goals

-Records will be maintained in compliance with all North Carolina statutes Generally Accepted Accounting Principles (“GAAP”).

-Annual budgets will be prepared for board approval, and budget monitoring will occur via periodic financial reporting. All expenses—including salaries and employee benefits, occupancy, insurance, professional services, curricular materials, and capital expenses—will be analyzed for efficiency and cost to ensure that PIE-NC is a good steward of all funding streams.

-PMG and PIE-NC will develop annual budget projections based on the prior year’s performance to ensure the school’s sustainability.

-PIE-NC auditors will have no material findings and the school will have clean audits.

-PIE-NC will aggressively pursue other funding streams from corporations and foundations to strengthen its financial position.

Governance Goals

-PIE-NC Board of Directors provides oversight for the academic program’s effectiveness, the charter school’s fiscal performance, and guaranteeing the charter school is faithful to its mission.

-The board will evaluate both the CMO and charter school administrator performance.

-PIE-NC will maintain adequate records and policies to ensure compliance with all applicable local, state, and federal legal requirements.



-All board members will complete initial orientation on governance training, which includes the following topics: conflicts of interest; models of governance and leadership; North Carolina charter school laws; ethics; financial responsibility; overview of school philosophy, structure, and management; open meeting and public records laws; and North Carolina specific education laws, rules, and regulations. Board members will be prepared to champion the school and clearly articulate the organization’s mission, accomplishments, and goals to the public.

-Board membership will be diverse, inclusive, and representative of the community PIE-NC aims to serve.

All citations are referenced in Appendix O in the section titled “References.”

Q43. How will the governing board know that the proposed public charter school is working toward attaining their mission statement?

PIE-NC’s mission is to provide educational programs and support services to at-risk students, enabling them to graduate from high school prepared for postsecondary education and a 21st century workforce. The school’s efforts in service of this mission will be evident in the progress toward the operational, academic, fiscal, and governance goals outlined above, which the board is ultimately responsible for achieving. The board will receive regular updates from the CMO and school leader at each board meeting—including but not limited to, academic progress, budget reports, and student enrollment numbers—and will rely on the data presented to ensure PIE-NC continues to advance its mission.



9. Educational Plan

9.1. Instructional Program

Q44. Provide a detailed description of the overall instructional program of the proposed charter school, including:

- major instructional methods
- assessment strategies, and
- explain how this instructional program and model meet the needs of the targeted student population

PIE-NC's instructional design delivers North Carolina educational standards aligned curriculum in core classes (English language arts, math, science, and social studies) via Small Group Instruction (SGI), Independent Study (IS), and Online Learning (OL). Student progress is monitored by the SGI and IS teachers. Instructors have the flexibility to modify the pace of a course's curriculum to meet the individual needs of each student. IS teachers will work closely with students to teach and review content until the student has demonstrated understanding and can progress in the curriculum. SGI and IS teachers will also update student Individual Learning Plans (ILP) according to their observations, which may include documentation of a student's academic needs, learning style, effective intervention strategies, short and long-term goals, and any other information about a student a teacher considers beneficial for a student's future teachers to know.

Students will work on no more than three courses at a time to foster focused learning and subject-matter concentration. The number of courses is limited to prevent students from becoming overwhelmed in trying to manage their time for each course (Levin et al. 2007, par. 1). This approach allows students to master content thoroughly and complete a course sooner than in a conventional educational model, and these incremental successes can increase motivation to continue to push themselves toward completion of high school.

The PIE-NC model specifically includes peer tutoring and mentoring, study groups, study skills classes, positive reinforcement of incremental student behavior improvements, transportation assistance, meetings with school psychologists, and collaborative meetings between teachers, support staff, parents/legal guardians, and students.



In small class settings teachers will implement Quantum Learning (QL) strategies, a multisensory and holistic approach to teaching. QL is evidence-based, using the most current neuroscience research about how students learn. QL has shown that the traditional model of teachers talking and students listening is the least effective approach to learning. The QL paradigm empowers teachers to use a variety of visual, auditory, and kinesthetic approaches to reach students using their natural learning styles. Teachers are trained to “develop lessons and learning activities,” which harmonizes and harnesses differences, and transforms them into assets by building team learning within a community of learners (Anderson 2015, page 1).

The five key tenets of QL are: 1) Everything speaks; 2) Everything is on purpose; 3) Experience before labeling; 4) Acknowledge every effort; and 5) If it’s worth learning, it’s worth celebrating (Anderson 2015, page 1). Examples of the ways visual learners are best able to receive information are through the use of pictures, graphs, reading, writing, and movies. For auditory learners, effective teaching methods include lectures, music, and discussion. Kinesthetic learners need physical movement, hands-on experiences, and manipulative teaching tools (New Haven 2007, pages 1-3). All of these instructional techniques will be applied in CTE programs as students receive both classroom-based related training instruction (RTI) and hands-on work-based learning (WBL).

Small group instruction (SGI) and tutoring are offered in a manner flexible enough for students to take advantage of PIE-NC’s unique structure and to provide additional support to students as they advance through their ILP. SGI teachers will assess student learning through multiple assessment methods like multiple-choice questions, true or false questions, short or long essay questions, or project-based assessments graded according to a rubric. SGI provides a **unique opportunity for disconnected** students due to its smaller class sizes and longer instruction periods.

To meet the needs of underserved, disconnected, at-risk youth, PIE-NC will offer comprehensive high school education programs and support services, leading to a high school diploma and acceptance into college or entry into gainful employment following graduation. The curriculum will be aligned with the North Carolina Department of Public Instruction’s (NCDPI) Instructional Review Rubric and North Carolina Quality Review Tools for Digital Learning.

-Teachers are selected for their ability to work with at-risk youth.

-Student recruitment is focused on diversity and identifying students with the most to gain from PIE-NC’s educational model and career pathways.



- Faculty recruitment and selection is designed to attract candidates that are mission-driven and passionate about both education and the PIE-NC model.
- Curriculum is competency-based and designed to produce multiple levels of access, which allows students to work at their current skill level and develop a more advanced capacity.
- Professional development is data-driven and focused on closing achievement gaps.
- Quality, demand-driven career technical education and work-based learning opportunities are offered.
- Support for college selection and admission is provided to all students.
- Students work with teachers and partners, such as Workforce Innovation and Opportunity Act (WIOA) providers to achieve a high school diploma, explore career options, and create and sharpen skills that lead to postsecondary success.

All citations are referenced in Appendix O in the section titled "References."

Q45. Curriculum and Instructional Design Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure for each grade span (i.e. elementary, middle, high) the school would ultimately serve.

PIE-NC will have two sites by the second year that will serve 300 high school students the first year (first location) and will serve an additional 300 students by the second year at the second site. At enrollment students will be assigned an IS teacher. Each IS teacher will have a roster of approximately 40-50 students with whom they will meet with at least twice a week. They will review their Student Success Plan (SSP), monitor progress in the students' work and assign courses according to the students' academic and support needs. PIE-NC will have year-round student admissions. Grade levels operating in the school depend on the credits earned by the students prior to enrollment and the progress made while enrolled. Students advance grades based on earning the appropriate amount of credits for that grade:

1-5.5 credits: 9th grade

6-11.5 credits: 10th grade

12-17.5 credits: 11th grade

18-24 credits: 12th grade



The curriculum is divided into standards-based units for both in-classroom learning (SGI) and non-classroom study (IS or OL courses). Students delve deeper into the content and take immediate assessments to measure mastery. For students participating in either educational setting, regular academic meetings with their teacher—whether individually or in the classroom—are scheduled to review key concepts and gain further instruction on topics particularly in subjects an individual student finds difficult. Extra supports and resources like assigned tutoring times, programmatic additions, or supplemental materials may be provided as needed. Students have their own unique schedule. This type of flexibility allows students to overcome the obstacles blocking their path toward high school graduation.

SGI and tutoring are offered in a manner flexible enough for students to take advantage of PIE-NC's unique structure and to provide additional support to students as they advance through their ILP. SGI teachers will assess student learning through multiple assessment methods like multiple-choice questions, true or false questions, short or long essay questions, and project-based assessments graded according to a rubric. SGI provides a unique opportunity for disconnected students due to its smaller class sizes and longer instruction periods.

Small Group Instruction (SGI): SGI courses are taught by a single-subject, credentialed teacher in a classroom of no more than 12 students. Students may earn credits in a variety of different classes. These include a combination of independent, small group, large group, and whole class work. Each student can earn up to half a credit for each small group instruction course passed. SGI teachers are trained in current, research-based teaching practices, such as quantum learning strategies, that effectively engage students who need additional support (e.g., scaffolding, differentiated strategies) in a small learning environment.

Independent Study (IS): IS allows students to move at their own pace through a curriculum designed by PMG's content experts. Operating as a flipped classroom, students study the curriculum and arrive at each session with specific identified questions. IS teachers use instructional time to answer questions, rather than deliver content, ensuring students proceed through the IS curriculum at a pace similar to traditional schools. Each instructional meeting will last a minimum of one hour, and IS teachers will work with three to five students during that time. IS provides students with at least two hours of intensive, one-on-one instructional time each week. The flipped instructional model built into IS gives teachers the time to address specific areas of content the student may be struggling with until the addressed area has been mastered. Additionally, teachers will refer to students' ILPs to help discern between instructional methods and update the ILPs as the learning needs of students evolve over time.



Comprehension levels are frequently checked and courses are taught again as needed. Instructors are available via the online platform to answer student questions and support their learning process—teachers are also provided data in real time. The outside-the-classroom access to teachers helps keep students on task and progressing. This approach has been shown to significantly raise students' course completion and increase the speed at which students finish their coursework. Whenever possible, students are scheduled with the same IS teacher throughout their enrollment. Offering this type of continuity gives instructors the ability to best serve the skills and learning needs of the individual student.

IS teachers will work closely with each student to teach and reteach content until the student has demonstrated understanding and can progress in the curriculum. SGI and IS teachers will also update student ILPs—according to their individual observations—which may include documentation of a student's academic needs, learning style, effective intervention strategies, short and long-term goals, and any other information about a student that a teacher feels will be beneficial to a student's future teachers.

Online Learning (OL): OL gives students the opportunity to move at their own pace through a curriculum aligned with North Carolina's standard course of study and designed by content specialists at Edmentum Learning. PIE-NC embraces the digital learning revolution and implements resources that promote student engagement and flexibility. The instructor or administrator will approve student participation in OL prior to any enrollment in courses. The IS teacher will monitor student progress through the OL platform, and students who do not demonstrate success in an OL environment will be withdrawn from their OL coursework and enrolled in an SGI or IS course replacement to keep students on task. Students enrolled in OL classes can access the curriculum any time during the day or evening. Students without a computer can access the platform at the PIE-NC school site. OL courses offer instruction that continuously adapts to the needs of the student based on demonstrated mastery in each unit. This new curriculum will be evidence-based and apply research about how students learn. As opposed to the conventional grading model, PIE-NC will reward students for demonstrating competency. Interactive, self-paced programs have been shown to increase motivation for doing schoolwork among students and offer teachers real-time data about how much coursework their students have completed. This approach has been shown to significantly raise course completion rates and increase the speed at which students finish their coursework—it is not limited to digitizing textbook material and putting it online as though it were a printed page.



PIE-NC is enhancing the existing pedagogy to apply proven psychological and educational research regarding how students learn. As opposed to the reductive and often discouraging American educational grading model, PIE-NC employs the “gamification” approach used by many leading digital curriculum designers to increase engagement and productivity. As an example, the student using a gamified curriculum is motivated to proceed through the coursework by being promoted to a higher level (similar to progress within a video game) every time the student has mastered a portion of material.

Online courses or blended courses (courses using multiple teaching strategies) are defined as instruction consisting of teacher-to-student, student-to-student, and student-to-content interactions, which occurs through digital and internet-connected media. These courses are available as partial or complete courses. Teachers will be able to successfully enhance their lessons, complementing teacher-directed activities, replacing entire units, and using Edmentum Learning curriculum in ways to supplement classroom instruction. The computer-based component of the blended learning program offers students interactive, proficiency-based lessons in English, math, science, social studies, foreign languages, visual and performing arts, and elective courses—including career technical education. An additional benefit of using the Edmentum platform is the variety of courses that can be used in conjunction with selected career pathways.

Courses are monitored and facilitated by teachers who are trained and skilled in providing online learning instruction. The program accommodates different reading levels by using a variety of strategies; including spoken text, transcripts of videos, interactive dictionaries, and the ability to have text read to students in their primary language. A calendar located within the computer-based classroom is used to assist students with time management by providing assignment due dates as well as pacing guides. Student progress and results are monitored by instructional staff to ensure the successful completion of each course. The combination of face-to-face classroom methods and online delivery of instructional content forms an integrated instructional approach that keeps students on track and results in increased student outcomes.

A flipped classroom inverts traditional teaching methods, delivering direct instruction outside of the classroom. Time at home is used to introduce material and receive direct instruction via interactive content, and time in class with a teacher is spent applying, learning, and clarifying concepts through meaningful activities. Student understanding deepens as they think critically, collaborate with peers, and solve problems.



Personalized teaching is a critical element of the school's education model. PIE-NC makes sure the needs of its students—those performing above or below grade level, those identified as gifted and talented, those with a disability, and those identified as English Language Learners (ELL)—are met through the curriculum and instruction.

Experiential Learning: The goal of PIE- NC is to offer students opportunities to learn through hands-on, real-life experiences and cultural immersion. Offering students access to travel beyond the traditional field trip model can be critical for preparing them for college and career readiness. PIE-NC trips are fully integrated into academic and career readiness programs and will emphasize SEL that is a cornerstone of PIE schools.

Each experience includes time for reflection and sharing to support students internalizing what they have learned on the trip, and students are eligible to receive .5 credits per trip. Experiential learning will be offered through a character education course, community service activities, overnight camps, and domestic and international travel. Students will complete approximately two Student Activity Workbooks (SAW) per week and take immediate end-of-unit assessments for courses based outside of the classroom. Students are awarded a credit for every 10 units completed. PIE-NC intends to partner with service providers to offer students an exceptional selection of college tours, international travel, and community service activities. All experiential learning and community service programs will be provided at no cost to all students. These trips will be contracted through third parties after a competitive cost analysis.

PIE's experience at its other schools has demonstrated that many students are not exposed to enriching opportunities outside of their immediate surrounding communities. PIE-NC is committed to helping students go beyond the possibilities they have seen demonstrated and design a pathway to their high school and postsecondary dreams. Students are more likely to envision and work toward a successful future if given a clear roadmap of the steps necessary to achieve their goals. PIE-NC will provide opportunities for students to gain hands-on experience in multiple career sectors, visit colleges throughout North Carolina, and experience the fulfillment one has by putting in work to serve those in need and positively impact communities through service learning activities.

These experiential learning opportunities have proven to be truly transformative in opening the eyes of students attending PIE sister schools to vast opportunities outside of what they have known. PIE schools have seen students re-engage in the program significantly after returning from these experiences, which impacts student work productivity and academic performance in very positive ways. Students have also



returned from experiential learning trips with a new appreciation of what the world has to offer. Examples of experiential learning opportunities that may be available to PIE-NC's students, at no cost, are briefly detailed below:

Farm and Ranch Camps: PIE-NC's farm program offers an experiential learning opportunity where students can explore multiple career paths, including construction, marketing, hospitality, and animal husbandry within the setting of an organic teaching farm. Students will have the opportunity to earn up to .5 elective credits while being introduced to a way of living and providing for their families' nutrition and financial stability. PIE-NC staff will work collaboratively with farm staff to show students how they can transfer the skills they have learned at the farm into their everyday lives and future careers.

PIE-NC's 10-day ranch program allows students to take over operations of a working ranch. This experience enhances student learning by involving them in various ranch-oriented activities, which count toward community service credits. The ranch program is designed to push students out of their comfort zone and into an area of personal growth and development. Students care for ranch animals and learn to saddle and ride horses. Students are also educated on the nature surrounding the ranch and participate in team building, leadership, and personal growth activities.

School Without Walls: PIE-NC will aim to broaden the horizons of at-risk and disconnected youth in ways that cannot be replicated inside a traditional classroom setting. PIE schools offer destination-learning programs where students are able to explore new settings, including locations abroad. Students can spend up to 14 days developing leadership skills, building independence, and exploring different cultures and ways of life. Students will also be encouraged to give back to those in need by participating in these service learning trips in partnership with nonprofits such as the American Red Cross. All of the trips are offered to students at no cost:

-Hello Havana! (a Cuban excursion)

-Viva Italia! (an eleven-day trip through Venice, Florence, and Rome)

-Ni Hao from Beijing! (14 days in Beijing)

-Washington, D.C. (domestic trip)



Students also visit various universities and colleges through a multiple day intensive and fun academic program. Participants learn what to consider when visiting and selecting a potential school—including size, majors, location, and campus life. Students participate in workshops that walk them through the process of filling out applications, obtaining references, and applying for financial aid. Students are not only able to visualize themselves attending a university or college but develop leadership skills, goal-setting techniques, resilience, and peer relationship development.

PIE-NC expects these experiential learning and community service activities will:

- Challenge students to move beyond their current level of comfort and increase their sense of independence
- Foster introspection to help students become aware of their goals
- Develop an appreciation for teamwork among students
- Build their leadership skills
- Increase students' social awareness of others

Character Education Course: PIE-NC's character education course will be taught through direct instruction to facilitate and promote student collaboration. The goal is to equip students with the mindset, knowledge, and skills needed to lead a successful academic and personal life. Students will study character traits, for example gratitude, grit, generosity, optimism, honesty, perseverance, and responsibility and will participate in activities that help build self-confidence, self-esteem, and self-respect. This course will enable students to develop a deeper awareness and knowledge about themselves and their community. The skills students learn will enable them to nurture community relationships and make affirmative life choices that benefit the communities in which they live.

Career and Technical Education (CTE): CTE coursework will re-engage students, help them to determine careers they may choose to pursue in the future, and make community connections. The CTE programs at PIE-NC are aligned with North Carolina's Career and College Promise's goal to prepare students to graduate high school, secure a high-wage job, and attend a technical or community college. Rigorous CTE coursework, combined with job readiness and career preparation activities, will provide students with the theory and practice to succeed in higher education, pre-apprenticeships and apprenticeships, and employment. PIE-NC will prepare students for future careers using business/industry field trips, paid and unpaid internships, work experiences, job shadowing, mentoring, mock interviews, and workshops that



develop students' understanding of professionalism. PIE-NC will work with each student to outline career goals and steps to achieve them by developing a career pathway. All career planning will be informed by current Labor Market Information (LMI).

Relationship with Community Based Organizations and Workforce and Career Development Providers: PIE-NC will work to establish a partnership with North Carolina Workforce Solutions Division, North Carolina Economic Development. PIE-NC plans to partner with community organizations, such as the Youth Development Initiative, Right Moves for Youth, and the Boys to Men Foundation. PIE-NC will also focus on developing relationships within the juvenile justice system with the goal of serving adjudicated youth. The goal of working within Charlotte-Mecklenburg is to increase access and opportunity for youth education and training, and help improve overall community outcomes.

PIE-NC will partner with WIOA programs to provide comprehensive social and other support services—namely counseling, housing supports, job placement, vocational trainings, paid/unpaid work experience, internship, transitional jobs, on the job training, apprenticeships, and pre-apprenticeship trainings—that have connections to employers with viable employment opportunities in the local labor market. Early work experiences (e.g., paid employment, internship, or WBL) are especially critical for young people. The most important element of workforce and career development success is employer-based programs that have significant and sustained business engagement in targeted, in-demand sectors. The employer engagement component has the most impact on career pathways, an integrated education, and a training approach that is aligned with WIOA. PIE-NC will integrate academics, training, work experience, and wraparound support services that provide an accelerated path to in-demand credentials or diplomas leading to high wage jobs.

PIE-NC will offer a program to enrolled students that provides instruction in partnership with any one or more workforce and career development providers, including federal WIOA, YouthBuild, and Job Corps programs. PIE-NC will seek support from workforce and career development partnerships to provide instruction and deliver additional resources, including employment preparation, financial literacy, entrepreneurship training, resume writing, vocational skill development, interviewing skills, job search and placement, as well as specific interview and job-performance coaching.



PIE-NC's educational program, developed and implemented in partnership with workforce and career development providers, also includes vocational trainings, pre-apprenticeships, apprenticeships, internships, paid and unpaid work experience, job shadowing, WBL, and CTE; all of which are tailored to assist students who face challenges in obtaining employment. Instruction is customized for both employers and students to address the skills gap in high-growth, in-demand industries by combining education and workforce development around services to youth. The services are integrated, comprehensive, and student-focused.

As part of participation in WIOA services, and simultaneous to and supportive of the development of their ILPs, students will create individual service strategies (ISS) with WIOA partners, that establish long-term and short-term education and employment goals based on Labor Market Information to place students on viable career pathways with thriving wages. WIOA youth case managers will help students consider their employment options in high demand industries facing a shortage of skilled workers.

In partnership with WIOA providers, eligible and interested PIE-NC students will be placed in paid and unpaid work experiences, pre-apprenticeships, internships, on the job training, and job shadowing. WIOA programs provide access to community colleges and other occupational skills training providers that teach the skills businesses express they need. Students are also taught leadership and job readiness skills, financial literacy, and entrepreneurship. Students are mentored both by school staff, WIOA partners' program staff, and workplace mentors. Students who are dual-enrolled in a community college career-focused program will receive both high school CTE and college credit. These courses are shaped by career pathways and provide contextualized education they can take with them into their work experiences.

Comprehensive, wraparound, supportive services are one of the most important WIOA components to keep students progressing. From the initial assessment to the follow-up, PIE-NC and WIOA staff will identify the ongoing needs of student participants that can interfere with their ability to achieve personal goals. These needs may include childcare, housing, transportation, medical and mental health services, work attire, tools or supplies, and more dependent on individual needs. Students will also receive 12 months of follow-up case management from WIOA staff.

Q46. Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model. Provide evidence that the chosen curriculum has been successful with the target student population, how the plan will drive academic improvement for all students, and how it has been successful in closing achievement gaps



Students are given personal plans and enrolled in the requisite courses to graduate. Some PIE-NC students are over-aged and under-credited, which means—according to their age—they should be in the 12th grade but may have only earned enough credits for a 10th grade placement. Also, some students prior to enrollment have failed core courses but have earned elective credits. As such, they may have the number of credits to place them in an elevated grade level but do not possess the core academic credits needed for promotion.

Students are placed in the core subjects of English language arts (ELA) and mathematics based on the assessed achievement levels and other relevant data, including transcripts and standardized test results. Advancement and mastery of skills is determined through a variety of assessment modalities—teacher observation data, student work samples, and traditional tests. Many of these assessments incorporate composition, multimedia presentations, and artistic expression to address each student’s unique learning style; lesson plans will be designed to incorporate visual, auditory, and kinesthetic components. To earn course credit, students must demonstrate mastery by achieving a passing grade of 77 percent or higher. Students who do not meet this requirement must review the curriculum with additional scaffolding, which may include SGI and/or on-site individualized tutoring.

In accordance with the North Carolina Accountability Model, PIE-NC will adhere to all testing operations as mandated by the state. This includes, but may not be limited to: World-Class Instructional Design and Assessment-ACCESS Placement Test (W-APT), World-Class Instructional Design and Assessment (WIDA) Screener, End-of-Course (EOC) Assessments in Biology, English II, NC Math 1, NC Math 3, and Credit by Demonstrated Mastery (CDM) Phase 1 Assessments. Initial W-APT and WIDA Screener assessments will take place within 30 calendar days of enrollment at the beginning of the school year, or 14 calendar days from the enrollment date if it takes place at another time within the academic year. EOC Assessments for Biology, English II, NC Math 1, and NC Math 3 will take place in the last five instructional days of the semester. Other assessments to be completed, per the State-mandated testing windows include PreACT, ACT, ACCESS for ELLs 2.0, and Alternate ACCESS for ELLs. These assessments will be conducted as stipulated within the guidance of the State of North Carolina’s Accountability Model.

The average PIE student enrolls between two and four semesters behind their grade-level peers in terms of credits. PIE students are also typically two to five years behind their national peers in reading and math skills. Despite these gaps, students are able to rapidly work toward recovering deficient credits and return to their district school.



As previously mentioned, a successful example of the implementation of the PIE model is PIE-IL, which is Pathways In Education's (PIE) highest performing school and has been in operation for 12 years. The PIE charter schools in Illinois have received scores of 1 (Avondale and Brighton Park) and 2+ (Ashburn) in the most recent release of local Options Schools SQRP accountability ratings, and their contracts with Chicago Public Schools (CPS) schools was recently renewed during the 2018-19 SY with permission to expand by a school campus. Both ratings qualify for a "Good Standing" designation from CPS (SQRP overview located (https://cps.edu/Performance/Documents/SQRP_Overview.pdf)here. (https://cps.edu/Performance/Documents/SQRP_Overview.pdf))

The following are examples of activities and decisions that embrace the mission and will ensure these students' unique needs are met:

- Teachers are selected for their ability to work with at-risk youth.
- Student recruitment is focused on diversity and identifying students with the most to gain from PIE-NC's educational model and career pathways.
- Faculty recruitment and selection is designed to attract candidates that are mission driven and passionate about both education and the PIE-NC model. Curriculum is competency-based and designed to produce multiple levels of access, which allows students to work at their current skill level and develop a more advanced capacity.
- Professional development is data driven and focused on closing achievement gaps.
- Quality, demand-driven CTE and WBL opportunities are offered.
- Support for college selection and admission is provided to all students.
- Students work with teachers and partners like WIOA providers to achieve a high school diploma, explore career options, and develop and sharpen skills that lead to postsecondary success.

Q47. Describe the primary instructional strategies that the school will expect teachers to master and explain why these strategies will result in increased academic achievement for the targeted student population for each grade span (i.e. elementary, middle, high) the school would ultimately serve

The primary instructional strategies PIE-NC will require teachers to understand and use are:

- Ongoing, formative assessments in identifying student strengths and weaknesses
- Differentiated lessons that improve student reading, writing, thinking, problem solving, and speaking



-Teacher coaching and feedback from leadership through regular observations—structured through High-Quality Teaching Initiative (HQTI). The HQTI is a non-evaluative tool that focuses on coaching support, self-reflection, and shared discussions on growth for individuals and the larger team. PIE-NC will differentiate this process for the IS and SGI roles. All teachers are required to go through a minimum of two coaching cycles a year. Teachers will complete a self-assessment using the HQTI for their role and create a goal with their site administrator around the areas they would like to improve. The site administrator will set up a formal observation during the coaching cycle to gather evidence, which they will attach to the HQTI rubric to determine areas of strength and areas of growth. At the end of each conference, site administrators and teachers will discuss the observation and evidence and determine next steps to help teachers reach their goals. Both site administrators and instructional coaches will be informally observing teachers, in between formal observations, to give targeted feedback on the practices implemented.

-Teacher training on HQTI rubric, which articulates behaviors, mindsets, and practices essential to becoming a successful teacher at PIE.

-Peer-to-peer grouping to encourage cooperation, observation, discussion, and learning

-Problem solving around concepts and issues

-Student choice and input in tasks, projects, and assignments

-Increased student control of and responsibility for learning

-Shift in role of teacher from knowledge provider to learning facilitator, coach, and mentor

-Use of software or online learning for a portion of students' educational experience (distance learning)

-Motivation through engagement, exploration, and innovation

To achieve high educational standards, it is essential to be well-versed in North Carolina State Standards and provide professional development that involves collaboration, research, and exploration of the curriculum. PIE-NC understands that well-prepared, engaged teachers can change lives and help students connect with learning. Teachers will be equipped with supplemental resources that promote adaptability for students, including diverse learners and ELLs. Students receive the necessary support in order to help them achieve the high expectations set for them in completing their coursework. They are required to revisit materials that have not been mastered—advancement will be determined on mastery of skills. Learning is focused on specific skills and tasks to ensure maximum advancement in a minimal timeframe.



This focused-approach to learning affords students the ability to devote time to the acquisition of higher-order learning tasks, such as analysis, evaluation, and synthesis. Families will also be encouraged to be partners in their children's education.

It must also be noted that unforeseen events have the potential to devastate a well-running system by throwing it off its axis. Preparation is imperative especially in situations such as the current COVID-19 pandemic. PIE-NC is prepared to use distance learning and make certain administration and faculty are familiar and confident in using the various virtual platforms. This also means implementing redundancy, ensuring all important documents (school, personnel, and student records) are backed-up accordingly and can be retrieved in cases of an emergency.

Q48. Explain how the proposed instructional plan and graduation requirements will ensure student readiness to transition from grade to grade and to the next grade span upon program completion

The instructional plan as outlined fulfills the North Carolina graduation requirements for students, prepares them academically for postsecondary education, and provides high-quality CTE programs that will both build skills and enhance employment marketability, leading to immediate career placement if desired. Concurrent academic and CTE instruction contextualizes material and promotes increased student motivation as they see real world applications of what they are studying. Students are required to take a minimum of six credits each school year, including a math class and an ELA class they must pass in order to be promoted. Students will transition from grade to grade as they complete academic requirements; moving them closer to their desired college and career goals.

Q49. Describe in a brief narrative below on how the yearly academic calendar coincides with the tenets of the proposed mission and education plan.

PIE-NC will operate on a modified year-round basis. There are eleven learning periods throughout the year. Each learning period is 19-21 school days, and there are approximately 225-231 scheduled school days for the 2022-2023 school year with approximately 29 holidays. The extended school year provides students the opportunity to make up credits in order to graduate, since many of PIE-NC students will be students who are under-credited, sometimes even over-aged, or students who may have failed one or several classes. Students will be expected to complete 0.6 units of work during each learning period with the option to complete one (1) credit each learning period. This approach to credit accumulation allows students to complete up to two years' worth of credits in each school year. The established expectation for attendance and work product for each learning period will be clearly communicated to students and parents during orientation. This provides a structure of perpetual progress-monitoring for students and teachers. In a traditional school, a student may not receive progress reports until the end of a quarter or semester.



PIE-NC will serve students who may require extra support or who may not have received sufficient attention in a traditional setting. The versatile schedule and quick feedback on student progress help teachers quickly identify the needs of students. Students will meet with their teachers in a one-on-one setting multiple times throughout each week. If a student needs extra support or to be held accountable for their choices, PIE-NC will have a structure built into its model that affords teachers the time and availability to address any issues and connect with a student. Any attendance issues, such as missing appointments, will be addressed through communication protocols designed to rapidly intervene.

This communication loop will help students remain on track to keep their appointments and progress through their courses—making students aware that if they fail to attend their teacher will contact them directly to discuss and resolve what is preventing them from attending their courses. With flexible scheduling, an extended school year, and individualized appointments, PIE-NC is able to provide the necessary support and structure to help students achieve their goals, which is fundamental to PIE-NC's mission: providing educational programs and support to high school students, enabling them to graduate prepared for postsecondary education and a 21st century workforce.

Q50. Describe the structure of the school day and week. Include the number of instructional hours/minutes in a day for core subjects such as language arts, mathematics, science, and social studies. Note the length of the school day, including start and dismissal times. Explain why the school's daily and weekly schedule will be optimal for student learning.

PIE-NC will be open weekdays from 8:00 a.m. to 5:00 p.m. Teachers' shifts are staggered with some teachers arriving later in the day and staying until the school closes. Teachers will have a daily office hour to prepare for student meetings and six hours a day working directly with students (meeting with students individually and in classroom settings). The majority of student meetings will take place Monday through Thursday, and Fridays will be reserved for teachers to meet with students who need additional support—making up missed appointments during the week, and student grading and records maintenance. Fridays will also be used for meetings in professional learning communities to discuss student progress, develop plans or make necessary adjustments to ILPs, and participate in professional development activities. PIE-NC offers between 225-231 school days per school year, and the school is open for extended hours every day, extending into evening hours based on student needs. Year-round scheduling accommodates all students, including those with disabilities and ELLs. It helps students maintain momentum and a trajectory of sustained progress in completing an ILP.

Q51. Describe a typical day for a teacher and a student in the school's first year of operation

A sample day for PIE-NC teachers and students is as follows:

Teacher Schedule



8:00 - 8:30 a.m.

Duties may include replying to emails, calling students who need reminders, communicating with parents regarding positive news, and student concerns.

8:30 - 9:30 a.m. (Typical Hour Cycle)

First appointment group of five to six students arrive: Teachers will call any students who do not arrive by 8:40 a.m. to reschedule or make a success plan. Teachers will discuss any announcements, check individual student progress, provide feedback on student work, and ensure students are prepared for any assessments. Students will have the opportunity to speak privately with the teacher. By 9:00 a.m. students will turn in completed and reviewed work to take the assessment. Teachers will provide feedback on any essays or review projects. Teachers will open the online assessment tool if students are ready to test. Before the appointment concludes students will show the teacher their planner and discuss a progress plan for the next appointment and the remainder of the learning period.

9:30 - 10:30 a.m.

Second group of five to six students arrive (similar to the first hour): While students are testing teachers will call their senior students, reminding them of an upcoming workshop. Teachers will grade students' work and give feedback on essays. Teachers will reschedule students unable to make their appointment to later in the afternoon.

10:30 - 11:30 a.m.

Third group of five to six students arrive (similar to the first hour): Teachers will send a message or call students who have an English class after lunch. Math teachers will come in and discuss students' progress for one of their classes. Teachers will assign two new courses on a digital curriculum platform.

11:30 - 12:30 p.m.

Lunch: Teachers will check the planning guide for any new students enrolling that day and determine the first class to assign and any relevant orientation materials.

12:30 - 1:30 p.m.

Fourth group of five to six students arrive (similar to the first hour): Teachers will call students who may have experienced a difficult day previously. Teachers will also work with students to create a time management plan.

1:30 - 2:30 p.m.



Fifth group of five to six students arrive (similar to the first hour): Teachers will finish processing student work to enter grades and update progress board. Teachers will check with the English SGI to see how their students are doing in the class. Teachers will call parents/legal guardians of students who are habitually late and schedule a conference for later in that week.

2:30 - 3:30 p.m.

Students who need additional tutoring may visit during this hour for additional intervention work. Teachers will also check with special education teachers to discuss their students.

3:30 - 4:30 p.m.

Teachers will meet new students and respective parent(s)/legal guardian(s) for orientation appointment.

4:30 - 5:00 p.m.

Teachers will organize desk area, make plans for the next day, return any parent/legal guardian or student phone calls, update attendance records, and update progress boards.

Student Schedule

8:30 - 9:30 a.m.

- Students arrive for scheduled appointments.
- Students will communicate to teachers assignments that have been completed and when they are ready to take exams.
- Teachers will review topic(s) being taught as a test review.
- Students and teachers will discuss study skills and sections to prepare for review for students who did not pass exam.
- Students will have teachers review assignments due the following day.
- Students will show teachers their planners and discuss their two-week plans and goals for the remainder of the learning period.

9:30 - 11:30 a.m.



-Teachers may suggest student(s) remain for the remainder of the morning to continue working on a study guide for a particular subject.

-Students will be allowed to finish working on assignments due the following day.

12:00 - 4:00 p.m.

-Students will eat lunch and attend their WBL and dual enrollment courses.

5:00 - 7:00 p.m.

-Students will complete remaining homework at home through online courses.

-If applicable, students will complete all forms for any upcoming field trips.

PIE-NC's instructional model encourages student-driven achievement of learning goals and continuous improvement of student academic performance. Students will practice responsibility by regularly attending their scheduled classes and appointments. Students will participate in an instructional delivery method that incorporates personalized support from well-qualified, fully-credentialed teachers in all academic areas, including electives, such as foreign language and fine arts. The instructional design of the program will include:

-Individualized Learning Plan (ILP)

-Small Group Instruction (SGI)

-Focused learning and subject matter concentration

-Multi-Tiered Systems of Support (MTSS)

-Targeted interventions

-Online learning (OL)

-Independent Study (IS)

-Experiential learning

-Extended learning time

-Parental involvement



Students will be assigned to an academic recovery teacher (also known as a guided independent study teacher) who will meet with them at least twice a week. The student, parents/legal guardians, academic recovery teacher, and student advisor will develop a Student Success Plan (SSP) to encourage student success. The SSP will address the academic needs of the student and detail their participation and responsibilities outside of school as they progress toward graduation. Each academic recovery teacher and student advisor will oversee SSPs and facilitate the academic and social progress of each student. The student advisor will be the primary resource for students and teachers—regarding postsecondary options—and will meet with students individually, conduct workshops, and design activities that are responsive to real-time data and will increase the number of college-bound students each year.

An important component of the SSP is its supportive services. Students will be provided supplementary services—access to childcare programs, foster youth information, food banks, transitional living arrangements, and more—to address possible barriers to academic advancement.

Q52. Will this proposed school include a high school?

- Yes
- No

Q53. High School Graduation and Post Secondary Readiness Describe how the proposed charter school will meet the Future-Ready Core requirements. Provide details on how the students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts, and what elective courses will be offered

The Future Ready Core and Future Ready Occupational Requirements for graduation include 22 credit hours. Most students will follow the core academic curriculum of 16 credit hours, which will include six (6) elective credits, one (1) credit in physical education, three (3) credits in science, and four (4) credits in math, English, and social studies. It should be noted two (2) credits in world language will be required (not required for high school graduation) for students who desire to be admitted to a university in the UNC system.

Students will take six additional credit hours—four CTE credits and two WBL credits—to complete their graduation requirements of 22 credit hours.

There is an alternative path to graduation for students who may require less rigorous core content. The Future Ready Occupational Requirements allow students to choose a course of study that reduces the amount of core academic curriculum to 12 credit hours. This course of study will include one (1) credit in



physical education, three (3) credits in math, four (4) credits in English, and two (2) credits each in science and history. Students will take 10 additional credit hours, eight (8) CTE credits, and two (2) WBL credits to complete their graduation requirements of 22 credit hours.

Credit hours will be earned through the successful completion of coursework. Each one-semester course will be worth half a credit (0.5), and each two-semester course will be worth one (1) credit. Students will complete their courses by satisfying the 22 credit Future-Ready Core requirements as set by the state of North Carolina. Grade point averages will be calculated on a 4.0 standard scale. Please note the grading scale:

Percentage	Quality Points	Letter Grade
90% -100%	4.0	A
80% - 89%	3.0	B
70% - 79%	2.0	C
60% - 69.0%	1.0	INC
≤59%	0.0	INC

Important information will be stated on student transcripts issued by PIE-NC. Each grade-year applicable semesters of attendance, courses completed, grades earned, and credits awarded will be noted. Additional information may be evident on student transcripts, such as student identification information and external or transfer credits from other institutions.

Comprehensive elective courses offered at PIE-NC are:



Accelerated Math	ACT English Test Prep	ACT Math Test Prep
ACT Reading Test Prep	ACT Science Test Prep	ACT Test Prep- Multiple Subjects
ACT Workkeys Test Prep	Accuplacer Reading	Accuplacer Sentence Skills
Art History and Appreciation	Introduction to Fashion Design	Introduction to Visual Arts
Basic Study Skills	Character Education	Creative Writing
Journey to Careers	Introduction to Forensic Science	Literacy Advancement
Music Appreciation	Professional Photography	French 1/ 2
Spanish 1/ 2/ 3	Mathematics of Personal Finance	Introductory Algebra
Math Readiness	Multicultural Studies	Physical Education 2/ 3
Psychology	SAT Language Arts Test Prep	SAT Math Test Prep
SAT Reading Test Prep	Sociology	Technology Literacy
World Geography	Financial Math	Fundamentals of Multimedia
Comparative Religions	Contemporary Composition	American Literature
Food and Nutrition	History of the Ancient World	Art History
Independent Living	Parenting and Child Development	Reading Fiction
CompTIA A+ with Exam Prep 1	CompTIA A+ with Exam Prep 2	Web Technologies
Principles of Information Technology	Electronic Communication Skills	Marketing, Advertising, and Sales
Applied Medical Terminology	Health Sciences 1	Health Sciences 2
Principles of Health Sciences	Accounting	Entrepreneurship
Certified Nurse Aide	Speech 1/ 2	International Business
Business, Marketing, and Finance	Transportation, Distribution, and Logistics	Computer Programming 1
Computing for College and Careers	Introduction to Plays and Theater	Theater, Cinema, and Film Production
Basic Drawing	Cartooning	Digital and Interactive Media
Arts and Crafts	Visual Arts	Latin American History
Business Math	Speech and Voice	Critical Literacy

Please see attached Appendix C: 9-12 Core Content Electives.

Q54. Explain how the graduation requirements will ensure student readiness for college or other postsecondary opportunities (trade school, military service, or entering the workforce).

Students will learn course content and academic and life skills to prepare them for postsecondary success by completing the curriculum. In an IS and blended learning model, students learn self-advocacy, how to manage their responsibilities, and how to study independently. Additionally, students can choose courses to prepare them for postsecondary pursuits, majors, or careers. Students will be able to prepare for the ACT/SAT and will also have the option to take career-focused electives as part of their coursework. They will be given the opportunity to visit local colleges through field trips. The flexible scheduling at PIE-NC permits and encourages students to enroll concurrently at local community colleges such as Central Piedmont Community College, South Piedmont Community College, Carolinas College of Health Sciences,



Davidson College, Johnson & Wales University-Charlotte, and King's College. Each year, graduating seniors are invited to attend FAFSA workshops. Throughout their time at PIE-NC, students will be provided personalized educational experiences targeted at preparing them for their postsecondary goals for college and career readiness.

Q55. Explain what systems and structures the school will implement for students at risk of dropping out and/or not meeting the proposed graduation requirements

Students who are at risk of dropping out will receive the assistance and guidance they need to earn a high school diploma and work toward the career path of their choice. School advisors, teachers, and school administrators will diligently monitor the progress of students by analyzing progress reports, assessments, tests, and report cards to identify students who may be struggling to succeed. When issues are identified the school will be proactive and immediately begin working on strategies so students do not fall behind.

PIE-NC has successfully developed and applied a spectrum of curricula to meet the needs of a wide-range of learners. The creation of comprehensive, innovative, and research-based curriculum is vital to student success. Research-based best practices, trends in education, and state requirements are harnessed to create curriculums that effectively meet the diverse needs of learners. Likewise, special attention is given to inclusion of supports for ELs—using key scaffolding techniques and Specially Designed Academic Instruction in English (SDAIE) strategies. The versatile design of the PIE-NC program and its curriculum are effective with the student population as students are provided options often not available in a traditional school setting. The student population includes students who must work full-time to support their families, are pregnant, and/or parenting. PIE-NC's model allows students to do their school work at times that allow them to meet their obligations. This versatility encourages students to continue in school and feel success in the middle of their challenges. PIE-NC anticipates it will be necessary to meet its students' academic needs at a variety of performance levels from remedial to advanced and particularly of students who are at risk for school dropout and/or academic failure.

PIE-NC is structured to check student progress on a regular basis—daily, weekly, and monthly (each learning period) to check if a student is meeting graduation requirements. If a student is falling behind and at risk for dropping out, it is realized quickly based on attendance, the quality of the student's work, and through monitoring the student's ability to progress. If a student is showing signs they may not be on course to graduate, the teacher will communicate that with the student, parent/legal guardian, and school leadership. The teacher will first work with and meet the student one-on-one to revise or create a success



plan. They will also talk through any issues and begin to problem solve creatively. The teacher will closely monitor any follow-up items from the initial meetings to hold the student accountable and observe if changes are being made.

Throughout this process the teacher will also communicate with the parent/legal guardian by asking for their support in problem solving, helping with transportation, relieving the student of sibling childcare responsibilities, if possible, and attending school events for academic support. The teacher can send a truancy letter home to convey that the student has not been completing the requirements. The teacher may also work with the student to communicate to their employer to offer a more school-friendly work schedule. If student and parent consultations remain ineffective in getting the student on course, school leadership will be asked to join the conversation to find a solution that works best for the student.

Q56. Attachments [Attach Appendix B: Curriculum Outline per Grade Span \(for each grade span the school would ultimately serve\).](#)

[One sample curriculum outline \(in graph form\) in the Appendices for one core subject \(specific to the school's purpose\) for each grade span the school would ultimately serve.](#)

Upload Required File Type: pdf, image, excel, word, text Max File Size: 28 Total Files Count: 5

Evidence :

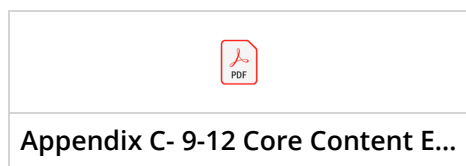


Q57. If applicable, attach Appendix C: 9-12 Core Content Electives

[Provide a visual description of what courses \(both core content and electives\) will be offered at the charter high school to ensure students meet the proposed charter school's graduation requirements. Please ensure the projected staff and budget aligns with the course offerings.](#)

Please see Attach Appendix C: 9-12 Core Content Electives.

Evidence :



Q58. Attach Appendix D: Yearly Academic Calendar (minimum of 185 instructional days or 1,025 hours)


Upload Required File Type: pdf, image, word Max File Size: 30 Total Files Count: 3



Comments :

Please see attach Appendix D: Yearly Academic Calender

Evidence :


Appendix D – Yearly Academic C...

Q59. Attach Appendix E: Daily and Weekly Schedule


Provide a sample daily and weekly schedule for each grade band (K-5, 6-8, and 9-12) the school ultimately plans to serve.



Comments :

Please see attach Appendix E: Daily and Weekly sample schedule.

Evidence :


Appendix E – Daily and Weekly S...

9.2. Special Populations and “At-Risk” Students

Q60. Explain how the school will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies, and supports you will provide for these students

The use of a Multi-Tiered System of Supports (MTSS) will ensure effective academic and behavior practices are part of the normal school structure. While seeking continued school improvement, every student will receive assistance at various points in their educational experience. Students will be assessed on an on-going basis so that instruction, differentiation, and accommodations can be adjusted according to every student’s individual needs. Teachers will collaborate with students, parents, and other administrative staff to find appropriate solutions to student issues in the areas of academics, behavior, and school



attendance. The MTSS uses a systematic, problem-solving process, data-driven decision-making, and evidence-based interventions to address barriers to a student's learning process. Using MTSS to identify students in need and applying accommodation strategies requires a three-tiered approach:

-Tier One is the use of core instruction. PIE-NC will use differentiated and blended learning as a schoolwide intervention.

-Tier Two is the use of supplemental instruction when the data indicates that students need additional services. Students identified as needing Tier Two support will receive academic interventions designed to improve performance. These supports should follow a plan of action with measurable goals, benchmarks, and outcomes that allow for phasing out interventions over time. The primary objective is to have the student return to Tier One. If the student has not improved within eight weeks of the implementation of the Tier Two action plan with individualized interventions, they will be referred for Tier Three support.

-Tier Three students will receive additional services and supports or individualized interventions that are research-based while monitoring data every 14 days for improvement. If a student does not improve within a four to six-week period, with a return to Tier Two or Tier One, then the student will be referred to the exceptional children's (EC) teacher /director for assessment.

Q61. Describe the extent to which one or more of the founding board members has experience working with special populations (students with disabilities, students with 504 Plans, ELs, students identified as gifted, and students at risk of dropping out). If no founding board members have experience working with special populations, describe the school's pre-opening plan to prepare for special populations.

Patrice McClean has a long history of developing and implementing programs and policies to benefit a wide range of student profiles, with a particular emphasis on re-engaging students at-risk of dropping out. McClean has been a career development coordinator at Independence High School for the past six years. She focuses on helping students identify their career and educational goal and achievable steps to ensure that they achieve success. For three years, McClean served as the business education teacher at West Charlotte High School where she established CTE learning objectives, resources, and instructional and evaluation techniques consistent with the North Carolina Course of Study. For nine years, she was an instructional accountability facilitator at Hawthorne High. In all of these roles, McClean promoted pedagogy geared toward retaining and recovering students at-risk or who have dropped out. Her expertise will be a tremendous asset to the school as PIE-NC institutes a program specifically designed to reach this population. McClean's guidance has already significantly shaped PIE-NC's plans for addressing the individual challenges at-risk students face.

Q62. Explain how the instructional plan and curriculum will meet the needs of English Learners (EL), including the following:a. Methods for identifying EL students (and avoiding misidentification).b. Specific instructional programs, practices, and strategies the school will employ to ensure academic success and



equitable access to the core academic program for EL students.c. Plans for monitoring and evaluating the progress and success of EL students, including exiting students from EL services.d. Means for providing qualified staffing for EL students.

The process for identifying English Learners (ELs) begins upon enrollment and continues throughout the time the student is enrolled. PIE-NC will adhere to the North Carolina English Language Development Standard Course of Study, and students will self-identify as an EL by filling out the Home Language Survey in the PIE-NC Enrollment Package provided to every family. If the student lists a language other than English, the school will investigate to determine the child's primary home language. If it is determined the dominant language is not English, the school will request student records from the former school to help determine the child's proficiency and need for assistance. The Home Language Survey and investigation will help determine any support needs—including tests accommodation, translators, home visits, and other required supports. Once the research confirms the student needs an assessment, the WIDA Screener Online, which is the state-identified EL proficiency identification assessment, will be given to determine the status and level of the student. Initial assessment of the W-APT and the WIDA Screener is required within 30 calendar days of enrollment.

If teachers have concerns regarding particular students who are not currently receiving services, they will be mandated to notify the administration within the first 30 days of the student's admission to the school. Initial assessment of the W-APT and the WIDA Screener is required in order to determine the support needed for the student. Successful strategies for EL students work well with the differentiated instruction and blended learning teaching method used at PIE-NC. EL students seem to learn best when supports fall into the categories of instructional strategies, learning supports, and assessments. Service delivery strategies might include—but not be limited to—tutoring services, enrichment, and remediation in content subjects, such as math, English, science, or social studies.

PIE-NC also provides multiple EL specific training to instructors. At least one teacher within the school site will hold a valid English as a Second Language (ESL) certification, and this teacher will manage weekly monitoring of all identified EL students; manage the Home Language Surveys for incoming students; and complete subsequent actions following testing, including parent communication, identification processes, and verification that proper data reporting is completed per district and state requirements. PIE-NC intends to use the same grade-level curricula for ELs that will be used for the general student population, with additional support to ensure access for all learners at every level. EL students are continually monitored through observation, classroom-based assessments, teacher reports, and grades. As outlined



by NC State policy GCS-A-012, students may exit from the program when they receive an administrative recommendation—with a grade of C or above in English classes—and appropriate scores on the ACCESS (assessment designed by the WIDA Consortium to determine student’s English proficiency).

Parents and legal guardians will be regularly updated on their child’s progress, and parental notifications will be written in each family’s home language. PIE-NC will obtain an interpreter for all EL family conferences as part of coordinated school efforts in keeping all families informed of information about the school and the progress of their child.

Q63. Explain how the school will identify and meet the needs of gifted students, including the following:
a. Specific research-based instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.
b. Plans for monitoring and evaluating the progress and success of gifted students; and means for providing qualified staffing for gifted students.

The State Board of Education Policy article, “North Carolina Academically or Intellectually Gifted Program Standards,” deems academically or intellectually gifted (AIG) students as those who perform or show the potential to perform at substantially high levels of accomplishment when compared with others of their age, experience, or environment. These students exhibit high performance capability in intellectual areas, specific academic fields, or in both the intellectual areas and specific academic fields; they require differentiated educational services outside of the services provided by the regular educational program. AIG students will require a challenging, differentiated curriculum, time with others who are similar to themselves (to establish cognitive relationships and to facilitate their academics), and teachers and other personnel involved in their education who have the knowledge, skills, and understanding to meet those needs (2018, 1-2).

Students will have the opportunity to self-select as AIG during the registration process. PIE-NC will accept a parent/legal guardian or teacher nomination and will review student records, such as counselor reports, work samples, and test scores—including ability or achievement tests. PIE-NC will also accept the GATES assessment or Bright Horizons Gifted and Talented checklist.

The differentiated and blended learning model of instruction provides a platform for learners of all levels to achieve ambitious educational outcomes. Regular monitoring through the differentiated instruction model will allow teachers and students to assess student progress. Likewise, formal progress monitoring and reports will be done every six weeks with information sent home to parents/legal guardians.



All citations are referenced in Appendix O in the section titled "References."

9.3. Exceptional Children

Q64. Identification and Records Explain how you will identify students who are enrolled within the charter school that have previously been found to be eligible for special education services or are protected under Section 504 of the Rehabilitation Act.

Upon enrollment, parents/legal guardians will be asked to complete a registration form that asks if the student has a previous or current IEP, and/or a previous or current 504 plan. If indicated, PIE-NC will immediately contact the last school and request special education records and 504 accommodation plans in order to implement the student's services. If a parent/legal guardian does not indicate previous services and PIE-NC receives student records that indicate otherwise, those services will be provided as soon as records are received. PIE-NC will work diligently to quickly acquire access to student records in order to provide all services in the student's IEP or 504 plan once enrolled. An Exceptional Children's (EC) teacher will be assigned as case carrier and will implement the IEP as written. An IEP meeting will be scheduled and held within 30 days of enrollment to review the appropriateness of goals/objectives, services, and placement and the team will adjust the IEP as needed to best meet the student's needs. Students with 504 plans will be assigned to the 504 coordinator and the team will meet in the first 30 days to review the accommodations and determine if additional supports are warranted.

Q65. Provide the process for identifying students who may be eligible for special education services as identified in the federal 'Child Find' mandate. Be sure to include how student evaluations and assessments will be completed. Include how the school will avoid misidentification of special education students.

PIE-NC agrees to be solely responsible for child find, assessment, determining eligibility, developing and implementing IEPs, providing all placement and services, and responding to parent/legal guardian concerns and complaints the school is responsible for under Federal and State law. Every student who enrolls in PIE-NC will take a diagnostic assessment to assist with developing the student's Individualized Learning Plan (ILP). Should a student score low in the diagnostic assessment, interventions and additional supports will be provided. The student will be monitored for additional action if necessary.

PIE-NC will utilize a Multi-Tiered System of Support (MTSS) and Response to Intervention (RtI) process along with a formalized Child Find procedure to identify students who are struggling within the general education program and may need support. The PIE-NC school site will have Child Find information at the front desk and on the walls of the school as required by Child Find (34 CFR 300.125).



The Multi-Tiered System of Support will include the following three tiers:

-Tier One: Students will receive scientific, research-based core instruction.

-Tier Two: Targeted intervention—students needing strategic support will be grouped according to the need and shall not exceed six students per group. Core instruction will include differentiated instructional strategies and will be supplemented with 30 minutes of intervention for every 60 minutes of core instruction.

-Tier Three: Intensive intervention—students needing intensive support will be grouped according to need and shall not exceed four students per group for core instruction. It will include differentiated instructional strategies and will be supplemented with 60 minutes of intervention for every 60 minutes of core instruction.

PIE-NC will have a school team, which will convene regularly to discuss and address referred student needs. When a student is struggling academically, socially, or emotionally, they will be referred to the team for interventions and support. Referrals may be made by a parent/legal guardian, student, or school staff. The team will consist of an administrator, school psychologist, general education teacher, parent/legal guardian, student, and if appropriate and as necessary, other professionals who will meet to review the student's strengths, weaknesses, areas of need, and develop applicable interventions. The team will reconvene to monitor the effectiveness and outcomes of the suggested interventions.

If the student does not make progress within the three tiers of RtI, and the team agrees the student may have a disability, an assessment will be conducted in all areas of suspected disability by qualified professionals, per the IDEA. Written permission to assess will be obtained and parents/legal guardians will be given a copy of their parental/guardian rights and written notice explaining the assessment process. An assessment report will be developed, and parents/legal guardians will receive a copy of the report. The assessment report will be shared at the IEP team meeting, and team members will determine whether or not the student is eligible for special education and related services. To be eligible, the student must have one of thirteen qualifying disabilities, and the disabilities must be adversely impacting educational performance. If a student is deemed eligible, the IEP team will develop goals and objectives that will guide the student's education at PIE-NC.



Students may be referred for assessment (for special education eligibility) by a school staff member, parent/legal guardian, or an adult student may self-refer. Should a parent/legal guardian request an initial assessment for special education services and wish to forego the RtI/MTSS process, PIE-NC shall comply with and complete the request adhering to all required timelines.

As part of the referral, assessment, and special education process, the IEP team will assess all areas of suspected disabilities, develop and consider the present levels of performance, develop annual goals for the student for any areas identified as concerns or below expected performance in present levels, determine services needed to meet those goals, and describe which accommodations and modifications the student will need to demonstrate satisfactory progress.

PIE-NC is committed to diversity and equity, which includes fair distribution of discipline and referrals for special education evaluation that is blind to a student's demographics (race, gender, or SES). PIE-NC will take precautions to avoid the misidentification of special education students. School staff will be trained on the Multi-Tiered System of Supports, Positive Behavioral Supports, expert classroom management, culturally responsive teaching, and RtI process in order to ensure interventions are being done within the general education program and to reduce unnecessary referrals to special education. The use of research-based interventions to target areas of skill deficit will help students move from the RtI process to the general education program as they develop those skills. All assessors will be fully credentialed and trained in the administration and interpretation of the standardized assessments they are using. Assessors will take into consideration each student's previous experience, cultural and linguistic learning, primary language and affect when conducting their assessments. School professionals will use culturally and linguistically appropriate assessments to identify students with disabilities in order to avoid misidentification.

Q66. Provide a plan detailing how the records of students with disabilities and 504 Accommodation plans will be properly managed, including the following:
a. Requesting Records from previous schools
b. Record Confidentiality (on site)
c. Record Compliance (on site)

a. Once a student is enrolled, a request for records will be sent to their most recent school to receive the records in a timely manner. If records are not received, a follow up phone call will be made in order to expedite the request. If a parent/legal guardian indicates the student has an IEP or 504 plan, those records will be requested. If a parent/legal guardian has a copy of the IEP or 504 plan, they may also provide it to the school so services may be implemented immediately.



b. PIE-NC will comply with all legal and state guidelines (§ 115C-402), regarding the confidentiality of special education records at the school site. Special education records will be kept in a locked file and will only be accessed by authorized personnel who will be required to sign in and out on a posted log for access to such records. Student online privacy protection (personally identifiable information or material in any media or format as defined in 47 U.S.C. § 230) will comply with all state and legal guidelines. 504 plans, as part of a student's general education record, will be kept in the general education student file.

c. The school will comply with any record request without unnecessary delay and before any meeting regarding an IEP. IEP and 504 records will be kept up to date and in compliance with legal, federal, and state guidelines. IEP timelines will be strictly adhered to, and copies of IEPs, parent/legal guardian rights, Prior Written Notice, IEP meeting invitations, assessment plans and results, intervention plans, and work samples will be kept on file.

Q67. Exceptional Children's Programming Explain how you will meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible.

PIE-NC will provide all services for students with disabilities in conformity with their IEP and in compliance with the IDEA (20 U.S.C. § 1400 et seq.) and all applicable state laws. In a special education PDF by John Manuel, he discusses how mildly disabled students follow the core curriculum, while the severely disabled acquire related skills. This seems to happen due to being together; students learn from each other. Education officials acknowledged they could do more—in regards to an inclusion approach—particularly in the upper grades (Manuel 2017, pages 11-12).

Because of PIE-NC's unique approach, which individualizes and personalizes the learning process, and its small class size configurations for small group instruction, the IEP team may convene to discuss IEP modifications—allowing access to the educational program in the Least Restrictive Environment (LRE) possible—as LRE is tailored to individual needs. Whenever possible, students will be educated in the same environment as their general education peers.

Where appropriate, PIE-NC will subcontract with a non-public agency to provide special education services to students, including and without limitation, speech therapists, occupational therapists, physical therapists, school nurses, behavioral therapists, and school psychologists. If a student's IEP indicates a need for a specialized school or services due to severe disabilities and the IEP team does not feel the student's needs can be met within the general education program with supports and services on site, the charter school will contract with a non-public school to provide the services needed in order for the student to make progress toward their goals and objectives.



All citations are referenced in Appendix O in the section titled "References."

Q68. Describe the specific educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities. How will the school ensure students' access to the general education curriculum?

PIE-NC intends to serve students with disabilities based on their needs and the services and supports in the student's IEP. Services may be provided by individual instruction; small group pull out or push in model (during general education instruction) and direct instruction collaboration with the provision of reasonable supplementary supports; and services and/or accommodations. The goal is always to educate students in the least restrictive environment possible with their peers.

Exceptional Children (EC) teachers are trained to provide specialized academic instruction and services to meet the individual needs of students with disabilities. If additional training is required to meet the needs of a particular student, PIE-NC will provide that training. Special education experts will collaborate with the district for students who need intensive services. Some students may require one-on-one support from a trained paraprofessional or behavior specialist, which PIE-NC will provide or contract with a vendor to provide. For students with more intensive needs, the school will work with outside, non-public agencies and non-public schools to ensure appropriate equipment and instructional environments are provided.

The EC teacher and other related-services providers will maintain communication with the general education teacher, student, and parent/legal guardian to ensure the student is progressing both in their IEP and ILP goals. The general education teacher, EC teacher, and other related-services providers will communicate on a weekly basis to plan interventions, monitor progress, and discuss achievements. The student will meet with the EC teacher or related-services provider at the school based upon a specified appointment time. Additionally, the school psychologist and EC teacher will monitor student performance, the student's previous special education status, previous test scores, and assist with implementing interventions to address concerns. The EC teacher will collect and monitor the student's performance data to assist with analyzing the effectiveness of the interventions and to determine additional action when needed.



For students receiving specialized academic instruction, the EC teacher will use PIE-NC's curriculum along with supplemental resources to address the goals and objectives written in the student's IEP. Based on the student's needs, services will be provided individually, in a small group (two or three students) pull-out model, or direct instruction through a team-taught collaboration model. Reading programs such as Read 180 and Achieve 3000 and math programs such as Accelerated Math or Freckle Math will be used to enhance learning and provide structured practice in addition to the direct instruction, small group classes provided.

Students with disabilities will have full access to all extracurricular programs, including but not limited to, sports, prom, student leadership, graduation events, and clubs/organizations sponsored by the school. If accommodations are needed in order for students with disabilities to fully access these activities, they will be provided.

Q69. Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).

In accordance with North Carolina Education Code, students who enroll in the charter school shall be provided a FAPE, including services comparable to those described in the previously approved IEP, in consultation with the parent/legal guardian, for a period not to exceed 30 days through a 30-day administrative placement, by which time PIE-NC shall adopt the previously agreed upon IEP or shall develop, adopt, and implement a new IEP that is consistent with Federal and State laws. Upon receipt of the IEP, the EC teacher and/or other service providers will be assigned and services will be implemented. Within those first 30 days, PIE-NC will conduct an IEP meeting to ensure the services meet the needs of the student's IEP goals/objectives and in consideration of the unique blended program of the charter school. If the charter school does not have the service providers required to implement the student's IEP on staff, PIE-NC will contract with a non-public agency to provide services in order to ensure FAPE is provided to all students.

Q70. Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents and relevant staff.

The EC teacher will be the case manager and will monitor the provision of special education services as indicated in each student's IEP. The EC teacher will collaborate with the general education teachers to be sure they are aware of the accommodations and modifications, student goals and student needs on a regular basis. IEP meetings will be held at least annually, as required by IDEA. Annual IEP meetings and triennial IEP meetings will be scheduled with the parent/legal guardian, special education staff, general education staff, and an administrator or designee to ensure that everyone has the opportunity to meaningfully participate in the IEP process. The student's case manager will be responsible for monitoring



the provision of all primary and related services. The case manager will make certain all service providers submit progress reports toward goals/objectives during the required reporting periods. Quarterly progress reports will be provided to the parent/legal guardian and student to communicate the student's progress toward meeting their IEP goals. The special education staff will track special education student performance.

A parent/legal guardian or teacher may request an IEP meeting at any time to review the student's progress or needs. Individual student progress will be evaluated on a monthly and quarterly basis and measured by compliance with the Student Master Agreement (signed at enrollment; specifying agreement to the policies, education model, and programs of the school), the IEP, attendance, credit completion, and participation in state standardized tests. Each student's IEP goals will be monitored through charting, observation, and assessments. Student progress, regarding IEP goals, will be shared with parents/legal guardians on at least a quarterly basis and as provided by the IEP.

Q71. Describe the proposed plan for providing related services and to have qualified staffing adequate for the anticipated special needs population.

All special education services at PIE-NC will be delivered by individuals or agencies qualified to provide such services as required by the North Carolina Education Code and the IDEA. The special education staff will have monthly meetings that focus on the various areas of special education. A yearly meeting will be held to discuss the collective areas of special education. Meetings will include legal updates, compliance information, and professional development training to improve services and student performance. Staff are encouraged to participate in professional development trainings within their areas of special education.

PIE-NC will be responsible for the hiring, training, and employment of staff necessary to provide special education services to its students, including and without limitation, EC teachers, itinerant staff, and paraprofessionals. PIE-NC will ensure that all special education staff hired or contracted are qualified pursuant to the district guidelines, as well as meet all legal and credential requirements. PIE-NC will contract with a non-public agency for services, as needed, to ensure all special education needs are met. Specific professional development for identifying, supporting, and evaluating the progress of special education students will be provided by PIE-NC and include training on RtI, Student Support Team (SST), Individualized Transition Planning, and Behavioral Intervention Planning. The SST includes the principal, assistant principal, teacher, postsecondary and student services counselor (PSSC), or any other staff member that works with the student.



- Rtl: Professional development in Rtl assist personnel in evaluating the progress of all students through research-based educational methodologies that address foundational, symbolic, and conceptual learning
- Student Support Team (SST): PIE-NC will have a student support team, which will meet regularly to implement a student review process for students who are struggling. All school-based personnel will receive professional development on the school team and student review process and how to strategically implement interventions within the general education setting and curriculum. Although there is a general education function, the school psychologist is involved from the initial SST to assist with developing a plan of student support
- Individualized Transition Planning: Personnel will receive professional development in college and career transitions
- Behavior Intervention Plans: Staff will receive professional development in the appropriate implementation of Behavior Intervention Plans and how student behavior is manifested in the school setting

9.4. Student Performance Standards

Q72. Describe the student performance standards for the school as a whole.

Students are required to meet with their teacher a minimum of two times per week and attend small group instruction classes; complete three to six hours of IS and online work at home per day; and complete five or more units of work (0.5 credits) per month. Students will be given the Renaissance STAR Reading and Math adaptive assessments three times per year. This helps determine and identify knowledge gaps and allow students to work at a faster pace, if they choose. Work must be completed at a C- grade level or higher in order to progress to the succeeding unit of the course they are taking. If the grade is lower than a C-, they will be redirected by their teacher to review the section and retake the summative test to ensure content mastery. Students are required to take all state mandated assessments in addition to Renaissance Star Skills assessments three times per year.

Q73. Explain the use of any evaluation tool or assessment that the proposed charter school will use in addition to any state or federally mandated tests. Describe how this data will be used to drive instruction and improve the curriculum over time for the benefit of students.

To collect baseline data, PIE-NC will use the Renaissance STAR Assessments in reading and math at the point of enrollment over three periods: fall, winter, and spring. Teachers will track ILP goal completion, attendance rates, and individual levels of student progress weekly with briefings in the standard



administrator-led, schoolwide data/feedback meetings.

PIE-NC regularly assesses students to determine skills deficiencies while identifying barriers to academic success. Additional time at the school site may be scheduled for supplemental review and practice of subject matter. The student may limit or reduce the number of courses that they are taking if the student has a pressing personal issue. Students are able to reduce their course load and concentrate on the number of courses in which they can be successful.

Q74. Explain the policies and standards for promoting students, including students with special needs, from one grade level to the next. Discuss how and when promotion criteria will be communicated to parents and students.

In accordance with the North Carolina State Board of Education, from a PDF by Charter Schools USA, no student is to be assigned to a grade level merely because of age or other factors that would involve social promotion or administrative placement. Also, no student will be retained merely because of standardized assessments. All students will meet the established efficiency levels for North Carolina Common Core and State Essential Standards as proposed by the State Board of Education (Charter Schools USA 2018, page 1).

Students and parents/legal guardians will be made aware of graduation requirements once enrolled in PIE-NC. At the beginning of each school year materials will be sent to parents/legal guardians (from the counseling office) to remind families of the requirements students must achieve within that academic year and to inform them of important testing dates. When students enroll the staff will perform a transcript analysis to ensure all requirements have been met in previous grades. Sometimes this results in students being assigned to a grade that is lower and reflects the actual credits they have earned rather than based upon the year of matriculation. Once the correct grade has been established—according to credits earned—a planning guide will be used as a roadmap to assign courses, grade promotion, and graduation. Depending on a student’s prior performance from a previous school they may be assigned both grade-level coursework in one subject area and remedial coursework in another. This type of planning and instruction will help students build the skills necessary to be successful in the long term.

Promotion to the next grade is achieved once all requirements for that grade have been met. Once a student becomes eligible for promotion the student and parent/legal guardian are informed of the student’s change in status. Notification is made by the teacher during their regularly scheduled



appointment times. A parent/legal guardian will be notified by email or other designated forms of communication as specified by the parent/legal guardian.

PIE-NC recognizes the importance of providing educational opportunities to all students regardless of any special needs. Students with disabilities are more likely to succeed with a smaller and more intimate learning environment; personal connections with the general and special education staff; clear expectations; the ability to work on fewer classes at one time; guided access to WIOA services and WBL opportunities; and a less distracting environment. PIE-NC intends to use the same grade-level curricula for students with disabilities taking the National Assessment of Educational Progress (NAEP) that will be used for the general student population. The IS teacher and special education teacher will remain in regular communication, regarding the student's specific needs as noted in the IEP. Course sequencing and/or expected length of completion may be adjusted based upon the student's individual needs. PIE-NC assumes competence and will attempt to help every student graduate. However, in some cases of significant disability, this will be unrealistic. Students in this position will be eligible to receive educational services until age 22 and earn a Graduation Certificate that recognizes their academic and life skills achievements.

All citations are referenced in Appendix O in the section titled "References."

Q75. Provide the public charter school's exit standards for graduating ALL students. These standards should set forth what students in the last grade served will know and be able to do. Be sure to include plans for students at risk of dropping out.

For Future-Ready Core Requirements students must have 22 credits and must achieve passing Level III or above on the NC Math 1 EOC, English 2 EOC and Biology, and 12th grade math and English. Students choosing PIE-NC may come to school with various academic, social, and emotional issues that impede academic progress. PIE-NC will commit to the principle that at-risk youth are worthy of becoming educated people and productive members of society.

The school believes an educated person in the 21st century is a lifelong learner who possesses the following academic skills necessary to contribute meaningfully to society:

- Reads and analyzes grade-level text



- Communicates with different audiences using oral and written language
- Uses math to solve everyday problems
- Understands the scientific method, and how science impacts daily life

An educated person in the 21st century exemplifies the following non-academic skills and qualities:

- Takes initiative and is self-directed
- Adapts to and is flexible toward new situations
- Shows leadership and takes responsibility
- Is productive and accountable for work products

9.5. School Culture and Discipline

Q76. Describe the culture or ethos of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social development

The foundation of PIE-NC's discipline policy will be a Code of Conduct that sets forth the responsibilities of students. Students will be expected to:

- Follow instructions and respect all adults at the school
- Treat fellow students with kindness and respect
- Arrive to class prepared and on time with all assignments completed
- Participate in class activities, field trips, and workforce assignments to the best of their abilities
- No fighting, bullying, or threatening
- Accept responsibility and consequences for their choices
- Treat school property and the property of others with respect



PIE-NC will promote a positive school climate and will adopt a discipline policy that is consistent with the principles of the North Carolina School Performance and all applicable state and federal laws. The discipline policy will be designed to create a supportive, safe, and nurturing environment where all students can thrive academically and grow socially. This discipline policy will be tiered and begin with preventative measures that create a culture of safety and mutual respect. When a student's behavior requires individualized intervention the second tier will engage the student, and potentially their family, in respectful and restorative conflict resolution methods. Finally, when a student repeatedly participates in behavior that seriously undermines the safety or well-being of the school's community the third tier of the discipline policy will involve intensive discipline that may result in suspension or expulsion. The principal will regularly monitor student behavior data and head the development of new interventions and supports as needed.

Q77. Explain how you will create and implement this culture for students, teachers, administrators, and parents starting from the first day of school. Describe the plan for acculturating students who enter the school mid-year.

Hiring administration and teaching staff committed to fostering the growth and development of all students is critical to the success of PIE-NC. The charter school will conduct values-based hiring and offer support in creating a community culture where students are engaged in the learning process and school community. Neither PIE-NC nor PMG will illegally discriminate against any employee or applicant for employment on the basis of race, creed, color, sex, national origin, religion, ancestry, age, disability, marital status, citizenship, or any other legally prohibited basis in its recruitment, selection, training, utilization, termination, or other employment-related activities.

PMG will conduct an introductory training program for new teachers. This will build a foundation and develop skills for working with at-risk, disconnected students while creating an on-going, thorough plan for staff professional development. The first four days of training will take place over a two-week period prior to the beginning of each school year—allowing new teachers to immediately apply what has been learned.

Training will cover the education model, school structure, and school culture (respect, academic focus, mission-driven decision making). It will incorporate effective strategies for working with diverse populations, such as students with disabilities, ELs, and academically struggling students (developing and maintaining ILPs), and will review the curriculum format and the PIE-NC student information system. For the first three months new teachers will meet weekly with their assigned mentor/coordinator who will



continue to engage them through inquiries and growth-focused discussions and activities. Each quarter thereafter, new teachers will formally meet to follow up on progress, discuss best practices, and set objectives for the remainder of the year.

In EL cases, the ESL endorsed teacher will work with the student's IS teacher. This ensures that PIE-NC enrolls EL students in classes that support their language development, and they are provided the best setting for subject area content and language acquisition skills. PIE-NC is committed to full inclusion for this population, and the school will afford them access to all school activities.

Since PIE-NC will have continuous enrollment throughout the year, the enrollment process is created for students to enroll at any time. Upon enrollment, students are provided with an orientation to make sure they comprehend how the program works, schedule their regular weekly appointments, and receive their first course assignments. The program is individualized for each student, so the student will not have missed any coursework. They will be assigned a class based on their transcript and begin their work at their current level. Students will be given clear expectations for the required IS and OL time dedicated to course completion. Regardless of when students enroll, the teacher will review previous school performance records and work with students to develop specific goals based on prior performance, postsecondary goals, and unit completion requirements.

Q78. Provide a brief narrative that delineates how student conduct will be governed at the proposed charter school and how this plan aligns with the overall mission and proposed Education Plan of the charter school. Be sure to include:a. Practices the school will use to promote effective discipline.b. A preliminary list and definitions of the offenses which may result in suspension or expulsion of students.c. An explanation of how the school will take into account the rights of students with disabilities in regard to these actions that may or must lead to suspension and expulsion.d. Policies and procedures disseminating due process rights, including grievance procedures, for when a student is suspended or expelled.

a. A student handbook will be provided that explains the PIE-NC code of conduct. The school rules are based upon mutual respect of others, the environment, and self. Staff, teachers, and administration will model positive behavior both in and out of the classroom. The rules will be clearly posted throughout the school site. PIE-NC will proactively take steps to prevent harassment on or near the school site—before and after school, at school events, and action to intervene will be taken if and when intentional acts of harassment have been discovered. Harassment at PIE schools is defined to include, but is not limited to sexual, physical, verbal, written, electronic, mental, emotional and visual intimidation, bullying, and/or cyber-bullying. Harassment for any reason, including but not limited to race, sex, gender, national origin, ancestry, marital status, economic status, disability, sexual orientation, and religion will not be tolerated.



The full range of disciplinary laws under NC Law will be used, including the power of exclusion under article 14 section 115.c-218.1; and PIE-NC will develop a full range of disciplinary consequences for student actions.

b. Minor behavior violations are addressed by the teacher. However, if the inappropriate behavior persists, the incident is documented and the parents/legal guardians and principal are notified. For more serious behavior violations, immediate involvement with the principal will take place and parents/legal guardians will be notified. Offenses may include violating the tobacco substance policy, bullying, cyberbullying, and other similar offenses. For severe serious behavior violations, parents/legal guardians, the principal, and student are required to have a meeting. An extreme offense could also be classified by a persistent less serious offense where a behavioral plan did not work. Extreme offenses may lead to school suspension or expulsion. Violations may include unlawfully possessed, used, sold or was under the influence of any controlled substance, alcoholic beverage, intoxicant, or medication of any kind including prescription and over-the-counter in accordance with NC §115C-375.1; possession of weapons of any kind (including imitation firearms), fighting, defacing of school property, recurrent disrespect and disobedience of personnel, and other severe serious behavior offenses (an obscene act or engaged in habitual profanity or vulgarity). Unlawful or harmful behavior violations or persistent escalation of severe behavior violations will likely result in long-term suspension and/or expulsion from PIE-NC. These offenses may include sexual assault, assault of a school employee, possession of a weapon on school grounds, sale or distribution of illegal substances (prescription or non-prescription), making violent threats against the school (teachers, students, and personnel), and all other unlawful or harmful behavior offenses.

c. PIE-NC will adhere to all procedural rules relating to the discipline of students with disabilities and those with Section 504 plans. School incidents will be evaluated using the code of conduct written and implemented by the board of directors. Behavior violations will be evaluated on an individual basis, irrespective of the level of disability severity and will consider manifestations of the student's disability. If a student with a disability has been suspended for more than 10 days in one school year, the IEP team will be convened to complete a manifestation determination and a functional behavior assessment. A behavior intervention plan will be developed and implemented. If the team determines the behavior is a manifestation of the student's disability, the student will not be suspended. The IEP team will discuss what additional services and supports need to be added to the student's IEP or if the current educational placement is appropriate. If the behavior is not a manifestation of the student's IEP, the school will proceed with normal disciplinary action.



d. PIE-NC will comply with the protections under state and federal law relating to hearings for long-term suspension and expulsions. The charter school shall provide due process for all students, including adequate and timely notice to parents/guardians and students of the grounds for all suspension and expulsion recommendations and decisions and their due process rights regarding suspension and expulsion, including rights of appeal. PIE-NC shall ensure that its policies and procedures regarding suspension and expulsion will be periodically reviewed, and modified as necessary, in order to conform to changes in state law.

9.6. Certify

Q79. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application

- Yes
- No

Q80. Explanation (optional):



10. Governance and Capacity

10.1. School Governing Body

Q81. Name of Private Non-profit

- Private Non-profit Corporation (NCGS 115C-218.1)
- The nonprofit corporation must be officially authorized by the NC Secretary of State upon application submission.

Pathways In Education-North Carolina, Inc.

Q82. Mailing Address

320 North Halstead St., Suite 280 Pasadena, CA 91107

Q83. Street Address

320 North Halstead St. Suite 280

Q84. City/State/Zip

Pasadena, CA 91107

Q85. Phone (xxx-xxx-xxxx)

626-921-8200

Q86. Fax: (xxx-xxx-xxxx)

626-628-3694

Q87. Name of Registered Agent and Address

Cogency Global

212 S. Tyron Street, Ste. 1000

Charlotte, NC 98281, Mecklenburg County

Q88. The private non-profit listed as the responsible organization for the proposed charter school has 501(c)(3) status.

- Federal Tax-Exempt Status (NCGS 115C-218.15)
- If the non-profit organization has yet to obtain 501(c)(3) status, the tax-exempt status must be obtained from the Internal Revenue Service within twenty-four (24) months of the date the Charter Application is given final approval.

Yes

No



N/A. The applicant is a tax-exempt municipality

Comments :

Q89. If applicable, attach Appendix F Federal Documentation of Tax-Exempt Status

Q90. Federal Tax ID:

Pending

Evidence :


Appendix F – Federal Document...

10.2. Governance

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

Q91. Using the attached resource as a template, please complete the table depicting the initial members of the nonprofit organization


See attached Excel document.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 3

Resources :



Evidence :


PIE-NC_Initial Members of the N...



Q92. Describe the governance structure of the proposed charter school, including the governing board's functions, primary duties, roles and responsibilities as it relates to overseeing the charter school. Include how the board will recruit, hire, and supervise the lead administrator

PIE-NC will have an autonomous, independent board of directors dedicated to the successful operation of the school—including academic programs, compliance in operations (all legal and policy requirements), financial solvency, and the hiring of an effective and quality staff, which begins with school leadership. The majority of the board will be composed of individuals residing in North Carolina and recommended by the founding members selected from individuals with expertise in education, business, or other areas that directly benefit the school.

The board of directors of PIE-NC is the exclusive body responsible for school policy under NC General Statute 115C-218.15 (d) and will be dedicated to both the education of the school's student population and the successful operations of the school. The PIE-NC governing body intends to contract with a Charter Management Organization ("CMO") to assist the school in serving its target student population. PMG, a 501(c)(3) nonprofit organization, has been identified as a CMO with a proven track record of serving opportunity youth. PMG is a provider of services, including but not limited to, human resources, financial, and instructional management services. The PIE-NC board of directors will oversee and ensure that PMG is responsible for serving certain operational needs of the charter school. As approved by the board, PMG will help manage the charter school's day-to-day operations pursuant to a management agreement for such services, per the CMO agreement.

Throughout the year, PMG will provide academic and financial reports to the board for review. Each year, PIE-NC's board shall hire a qualified CPA to audit the charter school's financials and shall use this audit to evaluate PMG's performance as the charter school's back office accounting service-provider. Additionally, PMG shall provide an academic performance report for an accountability review by PIE-NC's Board of Directors. The board will provide oversight of PMG through their regular board meetings and review of budgetary and operational items.

The governing body will be responsible for ensuring the academic program is applied effectively and leading to quality student achievement, reviewing the school's finances, overseeing student discipline (expulsions), monitoring organizational performance, and making certain other policy considerations are



being carried out as needed or mandated by North Carolina or federal law. Ultimately, the governing body will be responsible for overseeing the effectiveness of the academic program, the school's fiscal performance, and guaranteeing the school remains in compliance with its mission.

In addition to policy decisions, PIE-NC Board of Directors will be responsible for the development, review, and revision of the school's accountability plan, strategic plan, mission, and annual budget. The board will also participate in dispute resolution procedures, whenever necessary, and approve of charter amendments, annual fiscal and performance audits, and budget amendments. The board will make final decisions on the operations of PIE-NC, as well as oversee, direct, and hold accountable the officers of PIE-NC—president, vice president(s), treasurer, and secretary. School leadership recruitment and hiring will be led by PIE-NC Board of Directors and work in conjunction with the PMG team—incorporating best industry practices and guidelines to identify candidates and hire a highly qualified principal. The principal will be evaluated on a continual basis, using school data and discussion during board meetings.

Instructional leadership will be evaluated annually based on the requirements outlined in a standardized leadership review. Predicated on staff evaluations, as well as student and school-wide academic performance, PMG will work with the board to assess areas of essential leadership development and will continue to refine professional development opportunities to address any areas of improvement.

Q93. Describe the size, current and desired composition, powers, and duties of the governing board

The board of directors will initially be composed of seven individuals and recommended by the founding members selected from individuals with expertise in education, business, and other areas that directly benefit the charter school. At least six members of the PIE-NC board of directors will reside in North Carolina, and the majority of them will be residents of Mecklenburg County. The board, as currently composed, follows the requirement that at least 50 percent of its members reside in the state of North Carolina.

PIE-NC Board of Directors will be dedicated to ensuring the education of the school's student population and the successful operations of the school by holding a minimum of eight meetings per year. They will also maintain an ongoing focus—regarding school-level data—and collaborate with PMG to guarantee the effectiveness and efficient operations of the school, support the school leader (while holding him/her accountable for results), make certain policies are created to address the needs of students, and meet



state and federal requirements. The board will engage stakeholders from the community through surveys, public meetings, and collaborative efforts around services for the school's at-risk and disconnected youth population.

The board of directors will ensure active and effective representation of stakeholders by holding the school leader accountable for the creation and quarterly implementation of a Community Advisory Council (CAC) and a Local School Improvement Team, which will each consist of parents/legal guardians, community members, and student representatives. The CAC will discuss and make recommendations, addressing the challenges facing youth in the communities served by PIE-NC, increase school visibility to generate enrollment, and address programmatic concerns related to student support. This group will provide parents/legal guardians and community members the opportunity to provide input to school personnel and the board. Recommendations around school improvement will be sought from the CAC, presented to the board by school leadership, and will be used by the School Improvement Team in planning.

Q94. Describe the founding board's individual and collective qualifications for implementing the school design successfully, including capacity in such areas as school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent/community engagement.

Each founding board member has been vetted, is invested in advancing the school's mission, and is an impassioned community leader. PIE-NC has current and retired educators in the areas of special education, local school board representation, and school administration. These educators are devoted, student-first advocates for communities not only in their local districts but across the state of North Carolina, especially underserved and under-resourced communities. The board also constitutes community outreach and engagement-activists who boldly serve congregations and communities through social outreach programs and who are strong advocates of equal access to quality educational opportunities for at-risk, disconnected youth and young adults. The founding board members cumulatively represent decades of educational experience and community involvement both professionally and personally. The PIE-NC board encompasses the necessary scope and capacity to plan, implement, execute, administer, and manage with a combination of seasoned experience and nuanced expertise. Most of all, the founding board embodies the compassion, shared vision, and mission of PIE-NC to serve the underserved communities with excellence.

Q95. Explain how this governance structure and composition will help ensure that a. The school will be an educational and operational success; b. The board will evaluate the success of the school and school leader; and c. There will be active and effective representation of key stakeholders, including parents.



The board will receive specific training to ensure that they have a thorough understanding of charter school management and can be responsible for policies relating to: North Carolina charter school statutes and directives, North Carolina Open Meeting Laws, and State Board policies.

The principal of the school is tasked with the operations of the school. The board will review monthly reports from the principal on the daily operations of the school, and the principal will be involved in the annual strategic planning day. The principal will be on an annual contract, have a standard annual evaluation process, and annual performance review that is held prior to contract renewal. The performance of the school leader is measured by adherence to the school's mission; and evidence of increased student academic education (CTE and dual certification), movement toward and attainment of strategic goals as stated in the current strategic plan, compilation of satisfaction surveys by staff and parents, fiscal management, and any additional indicators as set by the board of directors. The board of directors will participate in an annual board retreat and will consult with third-party contractors, school parent organizations, school administration, the NC Office of Charter Schools, and other appropriate sources on a regular basis.

Q96. Explain the procedure by which the founding board members have been recruited and selected. If a position is vacant, how and on what timeline will new members be recruited and added to the board?

PIE-NC is committed to recruiting founding board members who can work most effectively together with the school leadership team and PMG to meet the mission, vision, and student academic goals in a measurable and sustainable manner. The characteristics PIE-NC is looking for in board members are:

- *Service-oriented track-record
- *Proven community leadership
- *Student-first thinking
- *Personal connection to and passion for the school's mission
- *Shared vision and an understanding of the steps necessary for implementation
- *Expectation that all students can achieve success
- *Understanding and support for elements contained in school's charter contract
- *Cognizance of roles and responsibilities of a board member



*Ability to work within a team structure

*Specific knowledge or experience in at least one element of governance as aforementioned

The board members are qualified in the fields of business, education, finance, politics, public relations, and community engagement. These are individuals who understand the needs, expectations, and context of the local population, including local non-profit leaders, parents, and local business partners. In addition to seeking benefits for the organization and school through the backgrounds of board members, gaining input from individuals with grassroots-ties to the community continues to be a key priority for PIE-NC.

Q97. Describe the group's ties to and/or knowledge of the target community.

The members of the board are very familiar with and connected to the West Charlotte corridor and the communities PIE-NC will serve. For example, Patrice McClean is a licensed special education teacher, and Linda Thomas is a retired special education teacher. In addition, the other board members are also involved in the community through religious affiliations, business, social work, and Mecklenburg Career Development.

Q98. Outline the strategic board calendar detailing how often the board will meet according to the bylaws established.

The board shall hold regular meetings at such times as are designated by the board, at least eight times per year, to facilitate engaged and successful governance of PIE-NC, including an annual board retreat.

Q99. What kinds of orientation or training will new board members receive, and what kinds of ongoing professional development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation.

PIE-NC board members will receive orientation training in the school's philosophy, structure, and management; North Carolina Open Meeting Law and other charter school laws; charter school governance best practices; fiscal oversight and responsibilities; and conflicts of interest and ethics. The board will receive quality training from a local third-party, and new members will be oriented on an individual basis. The board will also hold an annual retreat and host any ongoing professional development opportunities it deems necessary and relevant.

Q100. Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Identify any existing relationships that could pose actual or perceived conflicts if the application is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts



PIE-NC has developed a Conflict of Interest policy and a Code of Ethics, in compliance with all state and federal statutes. A draft of the Bylaws, the Conflict of Interest policy, and the Code of Ethics is included in the application. The board of directors will adhere to the board's strict Code of Ethics, and all employees are held to the requirements of Chapter 55A of the N.C. General Statutes—as related to conflicts of interest—and General Statute 115C-218.15, as related to Charter School Operations. The governing board will work with legal counsel to ensure the Conflict of Interest policies are in compliance with and meet all federal laws, North Carolina Statutes, and NCDPI policies, governing conflict of interest applicable to nonprofit and charitable organizations, specifically public charter schools.

To avoid or mitigate any conflicts of interest, board members will be required to complete upon selection, and annually thereafter, the "Board Disclosure Information to Determine Possible Areas of Ethical Conflict" form. In connection with any actual or possible conflicts of interest, a board member must disclose the existence of his or her financial interest to the board as promptly as possible and must also disclose all material facts to the board considering a proposed transaction or arrangement, or if the transaction or arrangement have already been entered into, all material facts must be disclosed to board members and officers.

There are currently no pre-existing or existing relationships that could pose actual or perceived conflicts at this time. A draft of the full Bylaws, Code of Ethics, and the Conflict of Interest policy for GFS-North Carolina, Inc. can be found in Appendix J.

Q101. Explain the decision-making processes the board will use to develop school policies.

Periodically, school policies may need to be amended or added. During this process of decision making the board of directors will gather information from multiple sources on behalf of PIE-NC. Sources will include, but are not limited to: principal reports, committee reports, surveys and public feedback, consultation with professional experts; and North Carolina Charter School law and other state and federal educational statutes. If the board of directors cannot come to a consensus while reviewing school policies, the discussion may be tabled until additional information can be presented at a later date.

Q102. Describe any advisory bodies, councils, or associations listed in the organization chart or to be formed, including the roles and duties of that body, and the reporting structure as it relates to the school's governing body and leadership.

Currently, there is no intent to establish any advisory bodies, councils (other than the Community Advisory Council), or associations. However, if charter school operations or growth would benefit from such committees, then committees may be formed to best meet the needs of the school.



Q103. Discuss the school's grievance process for parents and staff members

PIE-NC Board of Directors will establish the grievance policies of the school for employees, parents, and students. The policies will be written and available in policy manuals or handbooks (possibly also in electronic format). In every instance, the first line of reconciliation is between the two parties involved in the grievance. If disputes cannot be resolved, the dispute will be directed to the principal if necessary. If the grievance is with the principal and an attempt is made to resolve the issue with no success, the individual may outline the issue or grievance in writing and submit it to the board of directors. The board will then investigate the matter and respond in a timely manner to the parties involved. If needed, the board of directors may seek legal counsel or representation on behalf of the school. The ultimate goal of grievance policies, as set by the board of directors, is to resolve issues in a fair and equitable manner for each party.

Q104. Attach Appendix G Organizational Chart

- A well-defined organizational chart showing the relationship of the Board of Directors to the parents and staff of the proposed charter school. This chart should also include lines of authority to and from any outside entity that will play a role in managing or supporting the charter school (such as educational service providers, advisory bodies or parent/teacher councils).

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 5

Evidence :



Q105. Attach Appendix H Charter School Board Member Information Form and Resume

- A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form

Upload Required File Type: pdf, excel, word Max File Size: 30 Total Files Count: 50

Resources :



Evidence :




Appendix H – Charter School Bo...


Q106. Attach Appendix I Charter School Board Member Background Certification Statement and Completed Background Check for Each Board Member

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 50

Resources :



Evidence :


Appendix I – Board Member Bac...

Q107. Attach Appendix J Proposed By-Laws of the Nonprofit Organization or MunicipalityThe proposed by-laws, which must include a Conflict of Interest Policy for board members and a stated commitment to the NC Open Meetings Law.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 3

Evidence :


Appendix J – Proposed By-Laws ...

Q108. Attach Appendix K Articles of Incorporation or Municipal CharterIf the applicant is a non-profit board of directors, attach a copy of the articles of incorporation from the NC Department of the Secretary of State.If the applicant is a municipality, attach a copy of the municipal charter.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 5

Evidence :


Appendix K – Articles of Incorpo...



10.3. Staffing Plans, Hiring, and Management


Q109. **Projected Staff** Complete the staffing chart below outlining your staffing projections. Adjust or add functions and titles as needed to reflect variations in school models. Be mindful that your predicted administration and staff match the projected enrollment noted in Section I, course offerings, and align with the proposed budget.

See attached Excel document.

Resources :



Evidence :


PIE-NC Staffing Chart.xlsx

Q110. **Staffing Plans, Hiring, and Management.** Explain the board's strategy for recruiting and retaining high-performing teachers.

To recruit quality professionals, PIE-NC will offer teachers a competitive salary, health benefits package, term life insurance, and retirement benefits. The school will offer professional development opportunities, a positive and supportive work environment, and strong administrative leadership. Teachers will be retained by having a responsive and supportive administrative staff, strong partnerships within the school, team building, and social events to build camaraderie and teamwork within the staff.

Teachers with current NC Teaching Licenses or who are working toward this licensure will be given priority in the hiring process. PIE-NC will meet the NCGS 115-C requirements of having over 50 percent of its teachers be licensed, and teachers in the core subjects will have a Bachelor's degree. Candidates must provide their resume and cover letter in response to a posted job description. If selected as a candidate, they will fill out an application, provide professional references, and prepare for a phone and in-person interview. The principal will make final hiring recommendations for employment to the board of directors. Teachers will be evaluated by the principal with written evaluations completed prior to contracts being offered or renewed for the next school year. According to the NC State Board of Education, teachers that



have a Standard Professional 1 (SP1) status will be evaluated through the Beginning Teacher Support Plan. Staff satisfaction surveys will be completed annually to give all personnel the opportunity to voice their thoughts and opinions.

Q111. If already identified, describe the principal/head of school candidate and explain why this individual is well-qualified to lead the proposed school in achieving its mission. Provide specific evidence that demonstrates the capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that (s)he has completed or is currently participating in. If no candidate has been identified, provide the job description or qualifications, and discuss the timeline, criteria, and recruiting/selection process for hiring the school leader

The board of directors will be choosing a principal and/or school leader that will begin fall of 2021 to prepare for the 2022 school year. The candidate will have five-plus years of experience in school leadership and hold a license in school administration. A Master's Degree in school administration and any CTE experience would be preferred but not required. The candidate must have strong relationship building skills and be comfortable with a wide variety of stakeholder relationships. The candidate must enjoy and have a reputation of being present for daily interactions with the student body and staff, and must be a positive leader for the school with an open-door policy and an enthusiasm for excellence. A job description will be posted on various employment sites in January of 2021, will interview candidates in the spring, and complete the hiring process by May for an August start date, pending State Board of Education approval.

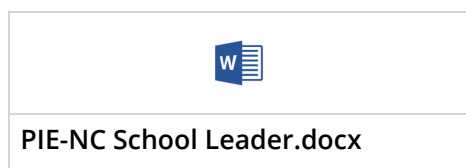
Q112. Attach in Appendix O the School Leader's Resumelf school leader has been identified, include the school leader's one-page resume in Appendix O.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 5

Comments :

School Leader to be recruited and hired by the Board of Directors.

Evidence :



Q113. Provide a description of the relationship that will exist between the charter school employees and the school's board of directors.



The administrative staff, including the principal, of PIE-NC will report to the school leader, and the school leader will report to and be the primary liaison between PMG and the board. The school leader will provide regular updates to the board (at each meeting) on school progress, achievements, and any issues that may emerge.

Q114. Outline the school's proposed salary range and employment benefits for all levels of employment.

PIE-NC will offer competitive wages and benefits commensurate with experience so it can recruit and retain talented employees. PIE-NC will ensure an equitable salary structure based on an employee's academic background, credentials, and the number of years a candidate has served as an educator. PIE-NC will not participate in the N.C. Teacher Retirement System or the North Carolina State Health Plan for Teachers. The school will offer an independent health plan and retirement benefits for all employees. Furthermore, the school will also pay for workers' compensation insurance, unemployment insurance, and any other payroll obligations of an employer as required by law.

Preliminary compensation analysis has informed PIE-NC's salary range projections as follows:

Principal (\$75,000 - \$95,000 yearly)

Teacher (\$40,000 - \$60,000 yearly)

Specialized Teachers (\$42,000 - \$62,000 yearly)

Teaching Aides (\$14 /hour)

Support Staff (\$12 -\$15/ hour)

Q115. Provide the procedures for handling employee grievances and/or termination

The board of directors will establish the grievance policies of the school for employees. The policies will be written and available in the employee handbook. In every instance the first line of reconciliation is between the two employees involved in the grievance. If disputes cannot be resolved the dispute will be directed to the managing supervisor and HR if necessary. If the managing supervisor cannot resolve the dispute the employee should put the grievance in writing to the principal. If the principal is unable to resolve the issue, the principal will bring the issue to the board of directors for help in finding a resolution. If the grievance is with the principal and an attempt was made to resolve the issue with no success, the individual may outline the issue or grievance in writing and submit it to the board, which will then do an investigation into the matter and respond in a timely manner to the parties involved. If needed the board may seek legal counsel or representation on behalf of the school. The ultimate goal of grievance policies as set by the board is to resolve issues in a fair and equitable manner for each party. The board is the final authority in matters pertaining to grievances among employees.



Q116. Identify any positions that will have dual responsibilities and the funding source for each position

Currently, there are no plans to have positions with dual responsibilities.

Q117. Describe the plans to have qualified staffing adequate for the anticipated special needs population and means for providing qualified staffing for EL and gifted students

PIE-NC will provide services to all students, including exceptional learners. Employees will be hired as needed in the areas of ELL, academically or intellectually gifted (AIG), and exceptional children (EC) with special needs. As students are accepted into the school, PIE-NC will review applications based on their self-identification and determine the staffing needs. PMG currently supports provision of special education services for students. PIE-NC is committed to serving this population well. Though PIE-NC may contact CMS for further support or guidance, PIE-NC shall not expect CMS to provide any specific services for special education on the school's behalf. Relationships with local psychologists, speech language pathologists (SLPs), and occupational therapists will be developed and maintained.

Q118. Provide a narrative detailing the roles and responsibilities, qualifications, and appropriate licenses that each position must have to be hired by the school's board of directors and effectively perform the job function(s).

All instructional and non-instructional staff to be employed by PIE-NC shall possess the required knowledge, skills, abilities, education, experiences, and minimum qualifications identified in each job description. All PIE-NC employees will be subject to all applicable state and federal employment laws.

Teacher Qualifications: Teachers at PIE-NC shall hold, at a minimum, a Bachelor's degree and a valid state Professional Educator's license or other document equivalent required in accordance with state law and demonstrate subject matter competency.

Principal Qualifications: The principal shall have, at a minimum, a Bachelor's degree—an advanced degree is strongly preferred. The principal must have a valid state Professional Educator's License (an administrative credential is strongly preferred) and have managerial experience in an education setting. Previous experience as an assistant principal or equivalent is preferred.

Other Staff Qualifications: All other staff members (instructional and non-instructional) will have the appropriate subject matter expertise, professional experience, and demonstrated capacity to work successfully in an instructional support capacity. They will meet minimum qualifications outlined in each job description.



10.4. Staff Evaluations and Professional Development

Q119. Identify the positions responsible for maintaining teacher license requirements and professional development.

The site administrator will be responsible for maintaining teacher licensure requirements and professional development, with the support of members of human resources and the instructional coaching team.

Q120. Provide a detailed plan noting how the school will mentor, retain and evaluate staff in a format that matches the school's mission and educational program. Plan should also describe how the school will meet the teacher certification and licensure requirements for teachers as prescribed by state and federal law. Be sure this overview matches with the projected staff and funding of the proposed budget section.

On an annual basis, PIE-NC will maintain more than 50 percent licensed teachers. PIE-NC will follow the North Carolina State Board of Education Beginning Teacher Support Plan for teachers with SP1 Licensure. All SP1 teachers and unlicensed teachers will be assigned experienced mentors. The evaluation model developed by the principal, based on the NC policy GS 115c-333.1 of evaluating teacher effectiveness and approved by the board, will provide multiple performance measures—including formal and informal observations, mentor feedback, and other measures as determined by the principal.

PIE-NC will use the High-Quality Teaching Initiative (HQTI) framework that is used in all PIE schools. The HQTI is a non-evaluative tool that focuses on coaching support, self-reflection, and shared discussions on growth for individuals and the larger team. PIE-NC will differentiate this process for the IS and SGI roles.

All teachers are required to go through a minimum of two coaching cycles a year. Teachers will complete a self-assessment using the HQTI for their role and create a goal with their site administrator around the areas they would like to improve. The site administrator will set up a formal observation during the coaching cycle to gather evidence, which they will attach to the HQTI rubric to determine areas of strength and areas of growth. At the end of each conference, site administrators and teachers will discuss the observation and evidence and determine next steps to help teachers reach their goals. Both site administrators and instructional coaches will be informally observing teachers, in between formal observations, to give targeted feedback on the practices implemented. The school has a budget of \$3,900 annually for professional development.



PIE-NC believes teacher evaluations should be approached with a growth-mindset and viewed through the lens of student achievement and progress. Teachers will be evaluated annually—based on their job performance—in the categories of job knowledge, quality of work, quantity of work, professionalism, achievement of goals, and their overall performance summary.

Q121. Describe the core components of the professional development plan and how these components will support the effective implementation of the educational program. Describe the extent to which professional development will be conducted internally or externally and will be individualized or uniform.

The plan includes the new staff training for two weeks before the start of school (most sessions will be uniform, with individualized sessions based on role), external opportunities at conferences, workshops, and online sessions. Teachers will also have the ability to attend virtual professional development sessions with the instructional team and other teachers through educator learning communities. The professional development plan is designed to build the school's culture through the PIE-NC mission, vision, and core values. The ultimate goal is for teachers to build their toolkit to push their students forward while utilizing data to identify areas of need.

Key internal training will be delivered by instructional coaches, the special education department, human resources, and the site administrator. Professional development will be uniform for some topics and customized to positions for others. Topics covered internally include, but are not limited to, Common Core and North Carolina Essential Standards and state assessments; PIE curriculum, including IS, SGI, and OL platforms and effective teaching strategies in each learning environment; sexual harassment and discrimination; suicide prevention and mandated reporting; special education; and academic intervention strategies. External support will offer NCDPI resources (individualized for teacher need), and state resources and the College Board will provide uniform training. Topics covered by these parties include strategies to support English language learners, state assessments, and college entrance exams.

Professional Learning Communities: One of the foundations for professional learning in PIE-NC will be the use of Professional Learning Communities (PLC). During regular PLC time teachers will analyze their student data to inform instructional supports for students. PLC members will regularly share data so others can learn from successes as well as have a chance to discuss where future opportunities for growth lie. PLC will also be a time for book studies. The books selected will be based on topics that will have an impact on school culture, achievement, and student well-being.

Q122. Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be covered during this induction period and how teachers will be prepared to



deliver any unique or particularly challenging aspects of the curriculum and instructional methods.

Initial Professional Development Prior to Opening: PIE-NC's professional development realizes its unique program requires specialized training and development to ensure all stakeholders are successful. PIE-NC offers a spectrum of comprehensive professional development for staff to give an understanding of the school culture and their instructional roles in this unique and dynamic program.

During the two weeks leading up to the school opening, all staff will participate in a detailed onboarding process to ensure they are prepared and acclimated to the school culture. After completing new-hire paperwork, with a member of the Human Resources Department or a member of the charter leadership team, new staff will meet with an instructional coach and site leader to receive further training on expectations. This includes rules, dress codes, contact information for site specific leadership staff, communication procedures, and information on their further training.

In addition to onboarding, staff will participate in a two-week induction period. PIE-NC professional development topics include, but are not limited to, the following: culture, curriculum, instructional strategies and differentiation, technology resources, equity, time management, compassionate pushing, formative feedback, leadership, bullying, restorative practices, multi-tiered systems of support, student tracking system and use of real-time achievement data, and online learning.

An example of a new school Professional Development (PD) session is in the table below:

PIE-NC NEW SCHOOL PD SESSION OVERVIEW

WEEK 1 Focus: Instruction

DAY 1

#: 1A **Session:** New Staff Onboarding (led by HR staff) **Participants:** All staff **Objective:** Welcome new staff members and complete new hire paperwork , and review employee guidelines and benefits. **Description and Outcome:** Newly hired staff members will be welcomed to PIE-NC, as well as review and complete needed paperwork for the hiring process.



#: 2-A **Session:** Welcome to new staff training School Basics (led by instructional team) **Participants:** All staff **Objective:** Introduce and familiarize staff to the school's culture and vision. Staff will understand the organizational structure (big picture) and how the site-specific roles work together. **Description and Outcome:** Pathways 101 (Pathways Culture, Mission/Vision/Core Values, Overview of organization and where individual roles fit in)

#: 3-A **Session:** Instruction and Curriculum, Part 1 (led by instructional team) **Participants:** All staff **Objective:** Show new staff how the school supports the “whole student” and introduce programs they will encounter. **Description and Outcome:** Introduction to Pathways curriculum (Student Activity Workbooks (SAW), Online Program—Edmentum, SGI courses)

#: 4-A **Session:** Instruction and Curriculum, Part 2 (led by instructional team) **Participants:** IS Teachers **Objective:** Familiarize IS teachers to the most commonly used form of curriculum. **Description and Outcome:** SAW (Formative Assessments, Performance Tasks, Introduction to Online Assessment)

#: 4-B **Session:** Instruction and Curriculum, Part 2 (led by instructional team) **Participants:** SGI Teachers **Objective:** Introduce SGI teachers to the format of SGI classes **Description and Outcome:** Introduction to unit planning, course scope and sequence (*learn about resources available*)

DAY 2

#: 5-A **Session:** Online Program, Part 1 (led by the online program team) **Participants:** IS Teachers and SGI Teachers **Objective:** Introduce teachers to Edmentum **Description and Outcome:** Introduction to Edmentum (Navigating the website, How to enroll students, Monitoring student engagement, A Day in the life of an online-program student—Coursework/Study sheets/Taking classes/Platform navigation—Assessment Compliance, Grading)



#: 6-A **Session:** Online Program, Part 2 (led by the online program team) **Participants:** IS Teachers and SGI Teachers **Objective:** Engage teachers on Edmentum website platform **Description and Outcome:** Introduction to Edmentum Continued (Navigating the website, How to enroll students, Monitoring student engagement, A Day in the life of an online-program student—Coursework/Study sheets/Taking classes/Platform navigation—Assessment Compliance, Grading, Hands-on practice)

DAY 3

#: 7-A **Session:** Learning Periods and Units (led by the instructional team) **Participants:** All Staff **Objective:** Familiarize staff with the definition of a learning period and how the numbers are calculated through Carnegie Units. **Description and Outcome:** Breakdown of learning periods, How Carnegie Units are used, Accelerated Progress

#: 8-A **Session:** Enrollment (led by the instructional team and site administrator) **Participants:** All Staff **Objective:** Familiarize staff with enrollment process **Description and Outcome:** Pre-registration, Process for enrollment, Student-trac: create and enroll a mock student

#: 9-A **Session:** Orientation (led by the instructional team and site administrator) **Participants:** All Staff **Objective:** Practice presenting orientation **Description and Outcome:** Orientation is pre-created with leadership, Site administrator leads staff through a mock orientation, Staff practices and presents the orientation to one another for feedback

#: 10-A **Session:** Guides and Goals **Participants:** All Staff **Objective:** Inform staff of guides and goals process **Description and Outcome:** Analyze a transcript, Fill out planning guide, Enter courses into Student-trac, Discussion of how to set up a student schedule when they enroll (rigorous classes, SGI, etc.)

DAY 4

#: 11-A **Session:** Site Team (led by the instructional team and site administrator) **Participants:** All Staff **Objective:** Staff will understand differences between IS and SGI; how they work together toward a common goal **Description and Outcome:** IS/SGI shared and separate responsibilities, Communication



between staff members (hourly/daily/weekly/monthly), Creation of a written agreement, Establish communication processes with families

#: 12-A **Session:** Student Attendance and Truancy **Participants:** All Staff **Objective:** Familiarize staff with attendance policies **Description and Outcome:** Review attendance policies, Review how students sign-in for attendance, Learn and understand truancy policy, How to enter attendance

#: 13-A **Session:** Routines and Procedures **Participants:** IS Teachers **Objective:** Explore workspace setup and organizational tools for IS **Description and Outcome:** Maximizing workspace, Organization and best practices, Work time: setup based on pre-determine site theme

#: 13-B **Session:** Routines and Procedures **Participants:** SGI Teachers **Objective:** Think through classroom setup and routines for SGI classrooms **Description and Outcome:** Classroom setup, Classroom routines and expectations (e.g., attendance policies), Work time: setup based on pre-determine site theme

#: 14-A **Session:** Appointment Time **Participants:** IS Teachers and Site Coordinators **Objective:** Familiarize IS teachers and site coordinators with appointment routines **Description and Outcome:** Review appointment time structures and best practices, Determine routines to use as a site, Learn how to communicate with students regarding the appointment

#: 14-B **Session:** Pacing: Unit Planning/ Scope and Sequence **Participants:** SGI Teachers **Objective:** Create whiteboards for SGI courses **Description and Outcome:** Rosters, Overview of resources available, Work time: Unit planning for SGI course

DAY 5



#: 15-A **Session:** Special Education in IS 101 (led by Special Education team) **Participants:** All Staff **Objective:** Inform teachers of special education methodologies that work in the IS model, and inform teachers of special education compliance indicators **Description and Outcome:** Review special education compliance, Learn how special education works in IS, Learn how the special education teacher works with the other roles, Learn what to do at enrollment if a student enrolls with an IEP/504 plan

WEEK 2 Focus: Application and Practice

DAY 1

#: 16-A **Session:** Data-Driven Interventions **Participants:** Instructional Staff **Objective:** Identify strategic ways teachers can significantly boost student mastery **Description and Outcome:** Introduction to English learner strategies, Introduction to Accelerated Math, Introduction to RenSTAR, Introduction to Achieve 3000

#: 17-A **Session:** Application of Interventions **Participants:** Instructional Staff **Objective:** Teachers incorporate intervention strategies for easily accessible use in their areas **Description and Outcome:** Dive deeper into intervention strategies, Create resources

DAY 2

#: 18-A **Session:** High-Quality Teaching Initiative (HQTI)—led by the instructional team **Participants:** Instructional Staff **Objective:** Acclimate teachers to PIE teacher evaluation system **Description and Outcome:** Review HQTI rubric, Identify indicators, Utilize self-assessment to determine areas of strength and growth

#: 19-A **Session:** HQTI continued - Observation Cycle **Participants:** Instructional Staff **Objective:** Explore observation cycle **Description and Outcome:** Review of observation cycle and expectations

DAY 3



#: 20-A **Session:** State of the School Address **Participants:** All Staff **Objective:** Identify goals for school year **Description and Outcome:** School principal will address goals for school year with the entire PIE-NC staff

#: 21-A **Session:** Team Building Activity **Participants:** All Staff **Objective:** Engage in collaborative activity to promote team building **Description and Outcome:** Staff members will work together and problem-solve to get a solution

#: 22-A **Session:** Focused Work Time and Individual Check-Ins with Administrator **Participants:** All Staff **Objective:** Check in with administrator **Description and Outcome:** Teachers will prepare paperwork for registration. Teachers will practice and demonstrate student orientations. Principal will meet with each teacher individually to do a pulse check.

DAY 4

#: 23- A **Session:** Parent Engagement, Part 1 **Participants:** All Staff **Objective:** N/A **Description and Outcome:** All staff will focus on working together to create a draft for the Parent Engagement Plan in a way that genuinely promotes increasing parent presence, communication, response, and partnership. Outcomes should include Parent Engagement Plan draft with actionable items that the entire staff supports and can participate in: Monthly parent communication tool; Quarterly parent involvement event/opportunity at the site; Use of the Student Planner, phone calls, home visits, and email as communication tools.

#: 24-A **Session:** Parent Engagement, Part 2 **Participants:** All Staff **Objective:** N/A **Description and Outcome:** Staff creates a list of clear, achievable actions they can schedule, with attendance goals attached examples: Schedule a Back to School Night at each site with attendance goal, RSP teachers schedule a parent information night about parent rights, with attendance goals, SGI teachers schedule SGI Open House for fall and spring, with attendance goals



#: 25-A **Session:** Building Relationships with Parents, Part 1 **Participants:** All Staff **Objective:** N/A **Description and Outcome:** How staff should use registration time with parents as an opportunity to build sustainable relationships and create partnerships to support student success, increase work product completion, and increase student retention

#: 26-A **Session:** Building Relationships with Parents, Part 2 **Participants:** All Staff **Objective:** N/A **Description and Outcome:** Develop plans for a staff meeting to implement plan, Develop plans for starting home visits during summer months, Discuss guidelines for home visits and role play home visits

Day 5

#: 27-A **Session:** Make Every Interaction Count **Participants:** All Staff **Objective:** N/A **Description and Outcome:** Internalize how every interaction is an opportunity to move students forward; not move them out of program

#: 28-A **Session:** Team Building **Participants:** All Staff **Objective:** Staff will develop core values of mutual trust, mutual respect, and build a sense of camaraderie as a team **Description and Outcome:** N/A

Q123. Describe the expected number of days/hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan.

Throughout the school year, professional development days will be scheduled for two, full-days each month. These sessions will be aligned to the school mission and vision as well as areas of focus. Staff members will be able to use Fridays as a time to schedule professional learning sessions with the instructional support team on the days when they do not attend full professional development days. During these times, staff members will participate in professional learning communities and content specific training. Considering the training sessions that happen prior to the start of the school year and the time available throughout the year, teachers will receive over 100 hours of professional development per school year.

10.5. Marketing, Recruitment, and Enrollment



Reaching the full capacity for enrollment will be critical to obtaining the necessary financial resources to keep your school viable and operating efficiently. In addition, it is required by law that charter schools provide equal access to all students. Read the charter school state statute regarding admissions 115C-218.45 carefully.

Q124. Marketing Plan Marketing to potential students and parents is vital to the survival of a charter school. Provide a plan indicating how the school will market to potential students and parents in order to reasonably reflect the racial/ethnic and demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-218.45(e)).

PIE-NC's strategic marketing plan is created to reach at-risk students across the targeted areas of West Charlotte and Sugar Creek, including the zip codes of 28205, 28206, 28208, 28212, 28216, and 28217. PIE-NC's entire marketing plan is built around the goal of attracting a diverse student body of disconnected youth who reflect the demographic of residents in these areas of Charlotte.

The general plan for raising awareness for PIE-NC in these communities is based on PMG's well-defined marketing strategy, which has consistently yielded high enrollment, especially of students from marginalized communities, in other schools in the PIE network. The two cornerstones of PMG's marketing effort for PIE-NC will be to raise community awareness for the school and to provide the highest quality of service possible to prospective students, their families, and other community members.

PIE-NC leadership will make regular visits to local organizations to service our target demographic, including social service and faith-based youth programs, in order to form a referral network focused on changing the life trajectory for at-risk and disconnected youth. PIE-NC will join the Chamber of Commerce and the Children's Alliance, host open houses, invite the public to discuss the school's community impact, and to learn about needs from community members. Leaders will be invited to a formal orientation to provide referral resources and engage them in making their constituency aware of PIE-NC.

Q125. Describe how parents and other members of the community will be informed about the school.

PMG plans on informing prospective PIE-NC parents and other community members through the intended visible presence within the targeted areas.

Q126. Describe your plan to recruit students during the planning year, including the strategies, activities, events, and responsible parties. Include a timeline and plan for student recruitment/engagement and enrollment, with benchmarks that will indicate and demonstrate suitable recruitment and enrollment practices over time.



In order to recruit and enroll students, PIE-NC will adhere to the following marketing timeline:

Fall 2021: PIE-NC Board of Directors, school leader, principal, and PMG assistant superintendent will visit community leaders to share the school's mission and model and discuss how they can play a critical role in student educational re-engagement and school success.

January 2022: PMG's marketing department will create a webpage as well as social media accounts.

March 2022 (ongoing): PMG assistant superintendent, the school leader, and principal will visit local service organizations to share the educational model and start referral networks for underserved students.

March-July 2022: PMG's marketing department will promote the school via online advertising and will secure advertising space in target neighborhoods (bus stops/billboards/malls).

April-August 2022: The school leader, principal, and other hired staff will meet with administrators/counselors in CMS and charter secondary schools to detail the school model and collaborate around identification of students who would benefit from re-engagement efforts or a different school setting. During this window, PIE-NC will also launch participation in local job and career fairs.

May-July 2022: PIE-NC staff including the school leader, principal, PMG, and other hired staff will host community meetings at libraries, local recreation centers, and other neighborhood spaces to promote the school to the public and answer questions.

June-August 2022: The school leader, principal, and other hired staff will host open houses at the new school site and invite local residents.

September 2022-June 2023: PMG assistant superintendent and PMG's marketing department will review performance/enrollment and secure additional advertising space as needed with the remaining budget.

Q127. Describe how students will be given an equal opportunity to attend the school. Specifically, describe any plans for outreach to: families in poverty, academically low-achieving students, students with disabilities, English learners, and other students at-risk of academic failure. If your school has a specific area of focus, describe the plan to market that focus.

PIE-NC's focus is on serving at-risk, disconnected youth and giving them a pathway to a better career and life outcomes. The goal of PIE-NC's marketing will be to recruit this target demographic, specifically including students who are credit deficient, pregnant/parenting, truant, have existing IEPs that recommend independent study as a an appropriate placement, ELs, economically disadvantaged,



homeless, in foster care, and/or adjudicated. PIE-NC plans to partner with administrators and counselors in CMS to identify youth that may benefit from the school's distinct and versatile education program. Educational learning trips will also be open to students—through experiential learning—to allow them to learn through hands-on, real-life experiences, and cultural immersion.

As stated above, PIE-NC has a comprehensive and inclusive marketing strategy that is designed to capture the right audience in this community to convert page views or attending events into enrolled students. However, board members are closely connected to the communities that PIE-NC intends to serve. PMG's experience working with other PIE schools has shown word-of-mouth to be the single most effective recruitment strategy. PIE-NC welcomes all students regardless of race, socioeconomic level, special education needs and encourages students to participate in extracurricular activities and programs.

Q128. What established community organizations would you target for marketing and recruitment?

PIE-NC will partner with community organizations, such as the Youth Development Initiative, Right Moves for Youth, Boys to Men Foundation as well as making outreach to serve youth involved in the juvenile justice system.

10.6. Parent and Community Involvement

Q129. Describe how you will communicate with and engage parents and community members from the time that the school is approved through opening.

The plan for parent and community member engagement is designed to reach students across various demographics with the targeted geographic areas of West Charlotte and Sugar Creek. The strategy includes reaching prospective students across the zip codes of 28208, 28216, and 28026 through multiple modalities, including community meetings, school events, web information, email communications, and mailed advertisements (pamphlets and fliers). Communication efforts and all promotional materials will be available in English and Spanish.

PIE-NC plans to actively engage and communicate with parents and the community by establishing a local presence—participating in community events, creating partnerships with community colleges and non-profit organizations, and advertising and promoting in public places and social media platforms.

Q130. Describe how you will engage parents in the life of the public charter school. Explain the plan for building engaging partnerships between the family and school that strengthen support for student learning.



PIE-NC will encourage parent involvement to promote a secure, academically-focused school climate and culture, as well as to support students' independent and classroom study. The school will seek parental input in making school decisions. PIE-NC will hold workshops to help parents support their child academically in high school and postsecondary pursuits—study skills, college financial aid, language skills, basic computer skills, and more. Back to School family nights, open houses, and community fairs will be formal events where all school stakeholders come together to share both progresses made and bring attention to areas of concern. These parent outreach opportunities will also create positive and meaningful experiences for the families.

Parents will be given suggestions about ways they can support the learning process, and a written report of student progress will be provided to parents upon request. Parents will be able to provide feedback to PIE-NC through scheduled parent focus group meetings. Regular communication with parents will occur through phone calls from teachers, quarterly newsletters, progress reports, school, and home visits. Staff will notify parents immediately when problems with attendance, academic progress, or personal issues are encountered. Student advisors will hold meetings with parents and guardians to help guide them through postsecondary and financial aid options, in addition to hosting quarterly parent information meetings.

Q131. If already identified, describe any programs you will offer to parents and/or the community and how they may benefit students and support the school mission and vision.

PIE-NC recognizes that if the family is struggling, so is the child. To take a holistic view of the child's needs and challenges, the school will consider their circumstances at home. If a parent or guardian is out of work, needs adult education, the family is facing food insecurity, or there are other challenges, PIE-NC will make referrals and warm hand-offs to trusted partners, including WIOA providers and other community-based organizations.

Parents will be invited to participate on the Community Advisory Council, which will consist of parents/legal guardians, local community members, teachers, and student representatives. The committee will meet quarterly to discuss and make recommendations that address challenges for youth in Mecklenburg County and increase school visibility. The Community Advisory Council will give parents/legal guardians and community members the opportunity to provide advice and counsel to school personnel. The results of annual surveys will be shared with the Community Advisory Committee, and their recommendations for improvement will be sought.



10.7. Admissions Policy

Q132. Provide the school's proposed policies and the procedures for admitting students to the proposed charter school, including:

- Tentative dates for the open enrollment application period, enrollment deadlines and procedures. *Please be advised schools cannot accept applications until after final approval from the SBE.
- Clear policies and procedures detailing the open enrollment lottery plan, including policies regarding statutory permitted student enrollment preferences.
- Clear policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.
- Explanation of the purpose of any pre-admission activities (if any) for students or parents.
- Clear policies and procedures for student withdrawals and transfers.

a. PIE-NC will be open to all students as space is available beginning from July 1, 2022 for the 2022-2023 school year, pending State Board of Education approval. No student will be denied admission based on prior measures of achievement or aptitude, ethnicity, creed, gender, sexual orientation, disability, athletic ability, religion, national origin, or place of residence. No out-of-state students will be enrolled.

PIE-NC will offer continuous enrollment for all students; therefore, an enrollment deadline will not be established. Requests for admission may be submitted at any time through a written application containing the name, grade level, address, and telephone number of each prospective student by a parent or legal guardian. PIE-NC staff will assist students and their families with the application and registration procedures and will notify students of acceptance immediately.

PIE-NC will be nonsectarian in its programs, admissions policies, and all other operations. It will not charge tuition or discriminate against any student. PIE-NC shall admit all pupils who wish to attend the school and will comply with all laws establishing maximum age for public school attendance in charter schools. Admission, except in the case of a public random drawing, shall not be determined by the place of residence of a pupil or his or her parent or legal guardian within the state.

b. If there are more applicants than capacity for the entire student population, attendance shall be determined by a public random drawing. The lottery will be held in a public location that is easily accessible to families such as the school site. PIE-NC will establish a lottery date to maximize applications and attendance. At the lottery, a neutral designee will draw names of interested students for each grade where spaces are available. Records will be kept on file at the charter school, documenting the fair execution of the lottery.



The lottery process will be transparent. PIE-NC policies and procedures regarding enrollment will be clearly publicized in the school's application instructions and website. Information about the time and location will also be posted on the website, at the school sites, and public fliers, which will be posted in the local communities. PIE-NC will conduct the lottery, using the following rules and procedures, which will be communicated to all interested parties at least 30 days prior to holding the lottery.

The school will enlist the services of an outside agency or auditor to monitor and verify the fair execution of all activities related to holding the lottery. The lottery will take place within 30 days of closing the open-enrollment period, which will be at least 90 days. It will take place on the school's campus in a facility large enough to allow all interested parties to observe the drawing or at another public venue near the school large enough to accommodate all interested parties. The lottery will take place on a weekday evening or at another time when the majority of interested parties can attend. All interested parties will know, prior to the holding of the lottery, how many openings are available and in the different grades served by the school.

Names will be drawn from a single pool of ballots, and a representative from the outside agency or organization, confirming the results of the lottery, will draw the ballots. Drawing will continue until all names are drawn. Individuals whose names are drawn after all spaces have been filled will be placed on the lottery list in the order drawn. Potential students on the lottery list will provide contact information to be used in the event space becomes available. Families promoted from the lottery list will be informed in writing and have 10 business days from the date of postage to respond. In addition, the school will attempt to contact the parents/legal guardians of promoted student(s) by telephone at least twice. Families not responding within the 10-day period will forfeit their right to enroll their student in the school for that school year. The outside organization or agency verifying the fair execution of the lottery will confirm in writing the lottery was conducted fairly, and the school will keep on record copies of that confirmation.

PIE-NC agrees that the district shall defend, indemnify, and hold harmless any charter school utilizing the district's preferred procedure for charter school lotteries from challenges alleging that this procedure does not comply with applicable laws.



c. Students who are not offered seats for the academic school year will remain on the lottery waitlist until the end of that academic year or until space becomes available. A student's place on the waitlist will not carry over to the following academic year.

It is the goal of PIE-NC to retain as many students as possible from year to year. The school does not allow any students to withdraw from school without direct contact with the school. Care will be given to students who decide not to return to the school and also make sure they are matriculated back to an appropriate school to continue their education. Successful students at PIE-NC will leave the school prepared to succeed at a more traditional school or will graduate from the school.

PIE-NC will use incoming official transcripts to determine grade level assignments for transferring students who will be granted credit for those units indicated as earned at previous school. Students will be granted credits for units that are approved. For transfer students whose records show a student was previously receiving special education services and programming, the special education teacher will review the current IEP and the student's transcript in order to initiate all services as written in the IEP.

Students transferring from non-public, homeschool, or out-of-state schools will be given the LEAP assessment in ELA and math—in addition to the ELA and math Renaissance STAR assessments—to ensure appropriate placement. All students entering PIE-NC, along with a parent/legal guardian, will be strongly encouraged to participate in an enrollment meeting with a teacher, site coordinator, and/or assistant principal. The parent/legal guardian must be present to sign the necessary enrollment forms and agreements. In the case of minors, only the parent/legal guardian may sign the agreement form to enroll the student into the program.

e. The school does not allow any students to withdraw from school without direct contact with the school. Care will be given to students who decide not to return to the school and make sure they are matriculated back to an appropriate school to continue their education. Successful students at PIE-NC will leave the school prepared to succeed at a more traditional school or will graduate from the school.



Q133. **Weighted Lottery** Does your school plan to use a weighted lottery?

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

1. In no event may a lottery process illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.
2. A lottery process may not be based upon geographic boundaries, such as zip code or current public school attendance zones, unless the charter school is operated by a municipality OR the charter school was converted from a traditional public school. Municipal charter schools may give enrollment priority to domiciliaries of the municipality in which the school is located (G.S. 115C-218.45(f)(7)), and charter schools that were converted from traditional public schools shall give admission preference to students who reside within the former attendance area of the school (G.S. 115C- 218.45(c)).
3. A lottery process that deviates from the standard lottery must be based upon the school's unique mission and must be based upon educationally, psychometrically, and legally sound practices, protocol, and research.

Yes

No

Q134. **This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application**

Yes

No

Q135. **Explanation (optional):**



11. Operations

Q136. I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application

- Yes
 No

Q137. Explanation (optional):

11.1. Transportation Plan

Q138. Describe in detail the transportation plan that will ensure that no child is denied access to the school due to lack of transportation. Include budgetary assumptions and the impact of transportation on the overall budget. The details of this plan should align with the mission, identified need for the charter school, targeted student population, and the budget proposal.

If you plan to provide transportation, include the following:
a. Describe the plan for oversight of transportation options (e.g., whether the school will provide its own transportation, contract out for transportation, attempt to contract with a district, or a combination thereof) and who on the staff will provide this daily oversight.
b. Describe how the school will transport students with special transportation needs and how that will impact your budget.
c. Describe how the school will ensure compliance with state and federal laws and regulations related to transportation services

PIE-NC understands that access to reliable and consistent transportation is a key element to student success. However, students' varied schedule presents a unique challenge. Some students may come a few days a week for one or two hours, other students may be at the site for longer periods of time participating in tutoring sessions and small group instruction. PIE-NC will provide a weekly or monthly Unlimited Rides pass for the Charlotte Area Transit System (CATS) for families that indicate transportation is a barrier to enrollment, enabling students to use bus and light rail services. The site coordinator will oversee the disbursement of passes. For students with disabilities, individualized options may be contracted to an outside vendor, based upon need and specific requirements written into their IEPs.

11.2. School Lunch Plan

Q139. Describe in detail the school lunch plan that will ensure that no child is lacking a daily meal. The details of this plan should align with the targeted student population and school budget proposal. If the school intends to participate in the National School Lunch Program, include the following components in the response:
a. How the school will comply with applicable local, state, and federal guidelines and regulations;
b. Any plans to meet the needs of low-income students;
and
c. Include how the school intends to collect free- and reduced-price lunch information from qualified families. If a school intends to



participate in the Community Eligibility Provision, describe the methodology the school will use to determine eligibility.

PIE-NC does not anticipate participating in a traditional school lunch program, however, the school is currently exploring a nutrition plan (e.g. meal, snack). PIE schools have historically provided students with healthy snack options and bottled water. Students will have access to healthy snack options that are kept in a pantry, which is easily accessible to any student. No snack option will need refrigeration. Due to the flexible nature of PIE-NC's educational program, the school will not adhere to any fixed meal schedule or provide any fixed level of daily food support.

Not applicable in regards to participating in the National School Lunch Program.

11.3. Civil Liability and Insurance

The Nonprofit shall name the SBE as an Additional Named Insured to their liability coverage for operation of a charter school while obtaining and maintaining insurance at a minimum in the following amounts:

1. Errors and Omissions: one million dollars (\$1,000,000) per occurrence;
2. General Liability: one million dollars (\$1,000,000) per occurrence;
3. Property Insurance: For owned building and contents, including boiler and machinery coverage, if owned;
4. Crime Coverage: no less than two hundred fifty thousand dollars (\$250,000) to cover employee theft and dishonesty;
5. Automobile Liability: one million dollars (\$1,000,000) per occurrence; and
6. Workers' Compensation: as specified by Chapter 97 of NC General Statute, Workers' Compensation Law

Q140. Complete the attached table, indicating the amount of each type of coverage as outlined in a quote obtained from an insurance provider.

See attached Excel document.

Resources :



Evidence :



PIE-NC_Insurance Coverage.xlsx

Q141. [Attach Appendix L: Insurance Quotes](#)

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

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 5

Comments :

Please see attached 4.3 Civil Liability and Insurance form signed by the Board Chair.

Evidence :



Appendix L - Insurance Quotes....



4.3 Civil Liability and Insurance....

11.4. Health and Safety Requirements

All public charter schools are required to follow the regulations regarding health and safety as stated in G.S. 115C 218.75.

Q142.

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

The Board Chair must sign this question.

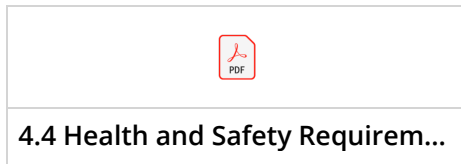
Signature



Comments :

Please see attached 4.4 Health and Safety Requirement signed by the Board Chair.

Evidence :



Q143. Start-Up Plan Provide a detailed start-up plan for the proposed school, specifying tasks, timelines, and responsible individuals (including compensation for those individuals, if applicable).

PMG will assist and facilitate the PIE-NC board in a successful planning and launch of the school. PMG's leadership and management team provides academic, accounting/finance/payroll, facilities, and operational support and services. PMG's school-based decisions provide leveraged support and effective management across the school sites, both by having an experienced staff and by developing honest, open, and direct communication with PIE-NC teachers and administrators. This ensures the services PMG provides are always client-focused. PMG creates a flexible, scalable, and replicable model for delivering results to its students. Therefore, PIE-NC will be able to serve more students and focus its teachers on providing superior academic instruction through a program that promotes academic excellence. The estimated timelines of the start-up plan can be found in the table below.

School Start-Up Plan (August 2022)



Key Task	Activities	Responsible Parties	Completion
Board Meetings	<input type="checkbox"/> Develop Schedule <input type="checkbox"/> Develop and post agenda <input type="checkbox"/> Conduct meetings <input type="checkbox"/> Approve minutes <input type="checkbox"/> Post minutes	<input type="checkbox"/> School Leader <input type="checkbox"/> Principal <input type="checkbox"/> Board <input type="checkbox"/> Board	<input type="checkbox"/> 09/2021 <input type="checkbox"/> Quarterly <input type="checkbox"/> Quarterly <input type="checkbox"/> Quarterly <input type="checkbox"/> Quarterly
Budget	<input type="checkbox"/> Board Approval <input type="checkbox"/> Monitoring and revisions	<input type="checkbox"/> Board <input type="checkbox"/> PMG	<input type="checkbox"/> First meeting <input type="checkbox"/> Quarterly
Fiscal	<input type="checkbox"/> Approval of fiscal policies <input type="checkbox"/> Establish accounts	<input type="checkbox"/> Board, School Leader & PMG <input type="checkbox"/> Board	<input type="checkbox"/> First meeting <input type="checkbox"/> 06/2022
Facilities	<input type="checkbox"/> Search <input type="checkbox"/> Recommendation <input type="checkbox"/> Selection <input type="checkbox"/> Configuration and build-out <input type="checkbox"/> Furnishing <input type="checkbox"/> Maintenance	<input type="checkbox"/> School Leader <input type="checkbox"/> PMG <input type="checkbox"/> Board <input type="checkbox"/> School Leader and PMG <input type="checkbox"/> School Leader and PMG <input type="checkbox"/> School Leader and PMG	<input type="checkbox"/> 11/2021 <input type="checkbox"/> 12/2021 <input type="checkbox"/> 01/2021 <input type="checkbox"/> 06/2021 <input type="checkbox"/> 06/2022 <input type="checkbox"/> Ongoing
Curriculum	<input type="checkbox"/> Create and finalize curriculum <input type="checkbox"/> Purchase assessments and materials	<input type="checkbox"/> School Leader, Principal and PMG <input type="checkbox"/> School Leader, Principal and PMG	<input type="checkbox"/> 12/2021 <input type="checkbox"/> 05/2022
Student Policies	<input type="checkbox"/> Create and revise discipline, attendance, promotion, and grading policies <input type="checkbox"/> Review and approval of policies (as necessary)	<input type="checkbox"/> School Leader, Principal and PMG <input type="checkbox"/> Board	<input type="checkbox"/> 02/2022 <input type="checkbox"/> Spring 2022 <input type="checkbox"/>
Leadership Selection (identifying key personnel)	<input type="checkbox"/> Recruitment strategy implementation <input type="checkbox"/> Selection recommendation <input type="checkbox"/> Selection <input type="checkbox"/> Orientation and training	<input type="checkbox"/> PMG <input type="checkbox"/> School Leader and PMG <input type="checkbox"/> Board <input type="checkbox"/> PMG	<input type="checkbox"/> 09-12/2021 <input type="checkbox"/> 01/2022 <input type="checkbox"/> 01/2022 <input type="checkbox"/> 02/2022

Community Development	<input type="checkbox"/> District schools <input type="checkbox"/> Social services agencies <input type="checkbox"/> Law enforcement <input type="checkbox"/> Community-based organizations <input type="checkbox"/> Parent meetings	<input type="checkbox"/> School Leader <input type="checkbox"/> School Leader <input type="checkbox"/> School Leader <input type="checkbox"/> School Leader <input type="checkbox"/> School Leader	<input type="checkbox"/> Ongoing <input type="checkbox"/> Ongoing <input type="checkbox"/> Ongoing <input type="checkbox"/> Ongoing <input type="checkbox"/> 01-06/2022
Hiring instructional staff	<input type="checkbox"/> Recruitment strategy and implementation <input type="checkbox"/> Selection recommendation <input type="checkbox"/> Selection <input type="checkbox"/> Orientation, professional development, and training	<input type="checkbox"/> PMG <input type="checkbox"/> PMG <input type="checkbox"/> School Leader <input type="checkbox"/> PMG	<input type="checkbox"/> 01/2022-04/2022 <input type="checkbox"/> 04/2022 <input type="checkbox"/> 05/2022 <input type="checkbox"/> 06/2022
Student Enrollment	<input type="checkbox"/> Recruitment <input type="checkbox"/> Lottery <input type="checkbox"/> Waitlist assignment <input type="checkbox"/> Grade assignment <input type="checkbox"/> Individualized Learning Plan	<input type="checkbox"/> School Leader <input type="checkbox"/> PMG <input type="checkbox"/> PMG <input type="checkbox"/> PIE-NC <input type="checkbox"/> PIE-NC	<input type="checkbox"/> 01/2022-03/2022 <input type="checkbox"/> 04/2022 <input type="checkbox"/> 04/2022-06/2022 <input type="checkbox"/> Upon Enrollment <input type="checkbox"/> Upon Enrollment

Q144. Describe what the board anticipates will be the challenges of starting a new school and how it expects to address these challenges. Submit a Start-up (Year 0) Budget as Appendix O, if applicable.



PIE-NC anticipates challenges similar to those other PIE schools have faced when entering new communities. These challenges include acclimation to residents and culture, as well as building relationships with neighboring schools and community stakeholders. Signage (printed collateral with diverse representation, including brochures, fliers, letters, and postcards) will be strategically placed in neighborhoods with high concentrations of the target student population and will be used to introduce the community to PIE-NC. PMG will build an online presence through a website and social media platforms to provide current and future families with information regarding the school. PIE-NC's entire marketing effort will be built around engaging with and serving the local community and is likely to result in a student population that reflects PIE-NC's inclusivity.

PIE-NC will employ a methodical, deliberate approach to marketing in Charlotte. This approach has proven successful for other PIE schools in Tennessee, Louisiana, Illinois, and Idaho. Once approved, PIE-NC will work to establish community relationships and partnerships early in the planning process. PIE-NC will also host events for students, families, and community members to introduce the new school.

PIE-NC's marketing efforts will stress the high-quality of education and services, and will raise community awareness. Accordingly, PIE-NC, with support from PMG, will regularly engage in the following activities:

Community Engagement: PIE-NC leadership will make regular visits to local organizations that also service the target demographic to form a local referral network focused on making a difference in the lives of underserved kids. Leadership will also join the chamber of commerce, host open houses, and invite the public to discuss the school's community contribution and participate in local events throughout the year.

Data Analysis: PMG will frequently engage in performance analysis and staff coaching to ensure the needs of the target demographic are being met. It will regularly evaluate the return on marketing cost investments like mailers and outdoor signage, adjusting as needed to meet enrollment goals.

Online Engagement: In addition to engaging the local community, a focus will be placed on building an online presence through website, blog, and social media platforms to provide current and prospective families with important information concerning PIE-NC and education.



PIE-NC will employ several tools in its activities and goal pursuit, including:


- Signage at school locations and in neighborhoods with high concentrations of the target demographic
- Printed collateral (brochures, fliers, and business cards) for use during community visits and events, prospective parent walk-ins, etc.
- Letters and postcard mailers sent to target demographic homes to introduce PIE-NC and describe its services
- Analytics and reporting software for use in evaluating performance and return on marketing investment

The implementation of PIE-NC's marketing plan will begin upon the charter approval and will be continuous. The PIE-NC board, cluster director, assistant superintendent, and PMG will visit/contact community leaders to inform them about the PIE model and how they can play an integral part in its success. They will share fliers about the school with these community contacts. In June 2022, PMG's marketing department will create the school's website and social media accounts. In August 2022 and ongoing, the PIE-NC board, school principal (if hired), assistant superintendent, and PMG will connect with local service organizations and high schools to inform them (verbally and with fliers) about the model and form referral networks for underserved students. In 2023, from February through July, PMG's marketing team will oversee an online advertising campaign to promote the school using Google AdWords and social media. During this same time period, PMG will also secure visible advertising space in target neighborhoods, such as bus stops, billboards, and shopping centers and malls. From January through May 2023, the school principal and other hired school staff will host community meetings at local rec centers, libraries, and other neighborhood spaces using brochures, fliers, and other printed collateral to advertise PIE-NC to the public and answer questions about the program. They will also host an open house at the new school site and invite local residents. For the first school year, from September 2022 to June 2023, the Principal will collaborate with PMG's marketing department to secure online and physical advertising space as needed with the remaining budget.

Comments :

Please see Appendix O.3- School Start-Up Plan (July 2022 Open Date) attached.

Evidence :


PIE NC Start-Up Budget.xlsx



11.5. Facility

Q145. What is your plan to obtain a building? Identify specific steps the board will take to acquire a facility and obtain the Educational Certificate of Occupancy. Present a timeline with reasonable assumptions for facility selection, requisition, state fire marshal and health inspections, and occupation
Note that the SBE may approve a charter school prior to the school's obtaining a facility; however, students may not attend school and no funds will be allocated until the school has obtained a valid Certificate of Occupancy for Educational use to the Office of Charter Schools

PIE-NC understands that a secure, well-maintained, and welcoming facility is essential when serving the students of Charlotte-Mecklenburg. While PIE-NC plans to create a custom floor plan to accommodate the needs of the students, the school will initially work to find an ideal starting point. Structures in well-populated areas that are centrally located to the target population are ideal buildings that meet the needs of the PIE education model. PIE-NC will work to locate an existing building to rent with approximately 8,500 square feet of space, an ample number of windows, and neighboring businesses that would not hinder the experience of students getting to school.

In the process of establishing PIE schools in other states, the schools have taken care to find the best location that needs minimal HVAC and plumbing work in order to save on overall startup costs. When selecting a site, PIE-NC will make sure certain building specifications—such as floorplan, parking, plumbing, and electrical work—are already complete or near completion in order to open in the given timeframe and prepared to serve students by the identified 2022/2023 school year start date. Given PIE-NC's unique and smaller footprint, the school has an estimated buildout timeline of seven months. This will include the time it takes to identify an architect, contractor, acquire the necessary licenses and permits; including Educational Certificate of Occupancy and to arrange for state fire marshal and health inspections, complete furnishings, etc. This is an average based on previous build-outs in Idaho, Tennessee, Louisiana, and Arizona.

Sample Timeline

-June 2021: PIE-NC charter petition approved

-August-October 2021: Board appoints PMG representative to begin property search
-November-December 2021: Lease negotiated and signed by the board, architect hired, and general contractor hired

-January 2022: Board approves architectural plans and budget, construction permits pulled



-February- April 2022: Construction and inspections

-May- June 2022: Apply and obtain Educational Certificate of Occupancy and complete all required local and state inspections.

-July 2022: Building is ready for occupancy so that staff training and student recruitment events can commence

Q146. Describe the school's facility needs based on the educational program and projected enrollment, including: number of classrooms, square footage per classroom, classroom types, common areas, overall square footage, and amenities. Discuss both short-term and long-term facility plans. Demonstrate that the estimate included in your budget is reasonable.

To serve up to 300 students, PIE-NC will build out a customized floor plan that will include four individual classrooms labelled as Small Group Instruction (SGI) rooms and will have a large main open space approximately 4,500 sq. ft. in size. The SGI rooms will be approximately 395 sq. ft.—to remain in line with the plan of providing a more personal approach to education even within a group setting. One of the SGI rooms will be dedicated as a lab, completed to needed specifications. PIE-NC plans to have two offices as well as two 175-square-foot, multi-purpose rooms. Special care will be taken to ensure the building that is to be leased by PIE-NC will have ample power and strong and stable internet connection, which will provide a consistent and reliable blended learning environment to accommodate students' needs.

While PIE-NC plans to completely renovate and build out a space to reflect the unique needs of the school's model, PIE-NC will be occupying an already existing commercial space, which will allow the school to accomplish many things while remaining within the allotted budget.

Q147. Describe school facility needs, including: science labs, art room, computer labs, library/media center, performance/dance room, gymnasium and athletic facilities, auditorium, main office and satellite offices, work room/copy room, supplies/storage, teacher work rooms, and other spaces

Because of PIE-NC's distinct learning model, the school site uses its space in an efficient and compact manner. The majority of the space (approximately 4,500 sq. ft.) will be used as an open learning environment. This space includes a reception area, independent study (IS) teacher desks, grouped tables where students attend their regularly scheduled appointments, a designated tutoring area, a small library, and space where technology can be checked out. There will be SGI rooms with approximately 395 sq. ft. each off of the main area. One of these SGI rooms will be dedicated as a lab, completed to needed specifications, while the other three will serve ELA and math needs. PIE-NC will also ensure there are two administrative offices as well as two general purpose rooms for special education/general (175-sq. ft.) that



can be used when privacy is required. Additionally, there will be a small storage/curriculum room of approximately 100 sq. ft., a kitchen/break room of 250 sq. ft., and dedicated restrooms that comply with state mandates.

Q148. What is the breakdown of cost per square foot for the proposed facility? Outline how this cost is comparable to the commercial and educational spaces for the proposed school location

Since PIE-NC is planning to renovate an existing commercial space, the school can more effectively estimate the anticipated costs. Currently, the approximate cost per square foot for the proposed facility is \$125. This cost is based on PMG's experience in building similar campuses across the nation. Depending on the market and condition of the building, construction and tenant improvements are expected to be anywhere between \$80-125 per square foot. Because the space has not yet been secured, the higher range of \$125 has been used for the budget.

Q149. Facility Contingency Plan: Describe the method of finding a facility if the one the board has identified will not be ready by the time the public charter school will be opening. Include information regarding the immediate spatial needs of the school and identify any programs that will not be immediately offered because a permanent facility has yet to open

The board is confident that PIE-NC will be able to meet the scheduled opening date. The timeline in which the school intends to follow was developed with schedule padding (recovery time) to accommodate normal delays that are usually experienced during the construction and permitting process. Since PIE-NC is not building a brand-new facility, it can closely monitor, supervise, and ensure the renovations will be completed within the allotted time. The three-month construction timeline includes time for unexpected contingencies, while the two-month timeline for permits, inspections, and required approvals should allow for the appropriate amount of back and forth communication that is also a normal part of the process. Furthermore, functions that are needed to prepare for the school to begin will be accomplished simultaneously to construction, including hiring staff, ordering curriculum, furniture, technology, student recruitment, and more. If a slight delay is encountered and PIE-NC cannot take occupancy until later in July, staff training and student recruitment events will be held off site.

Q150. Describe the board's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

In regards to facilities acquisitions and management, the board members have immense experience. Alvin Walls has expertise in fiscal management and operations. James Wilkes was the lead project manager and building architectural designer for several enrichment community centers for faith-based organizations. Queen Thompson was not only awarded a grant that she implemented for the purchase of a charter school through General Motors, she also managed and gave oversight to its operations.



12. Financial Plan

Q151. I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
 No


Q152. [Explanation \(optional\):](#)

12.1. Charter School Budget

Q153. If applicable, attach Appendix M: Revenue Assurances. Assurances are needed to confirm the commitment of any additional sources of revenue.

Please see Appendix M.

Evidence :



Appendix M – Revenue Assuran...

Q154. Attach Appendix N: Proposed Budget for Year 1 through Year 5


[Click "Resources" \(to the right of this text\) to access and download the Budget Template.](#)

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 5

Resources :



Evidence :




PIE NC Start-Up Budget.xlsx




Appendix N – Proposed School B...



PIE NC Cash Forecast Y-1.xlsx



PIE NC Charter Application Budg...



PIE NC Budget Narrative.pdf



12.2. Budget Narrative

Q155. How was the student enrollment number projected?

The optimal number is to have 300 students at each site. This number allows the school to hire a full contingent of teachers and support staff while also allowing students to experience the additional social emotional programs that make the PIE program special. This number of pupils allows PIE-NC to run the program in full and maintain the personalized educational experience students deserve. PIE-NC believes the West Charlotte Corridor contains an ample number of students in the target population who are at risk for dropping out of school or are already disconnected from the traditional school model.

Q156. Provide an explanation as to why you believe there is a demand for the school that will meet this enrollment projection

As a result of community engagement efforts, community information sharing, and information gathering sessions (partnerships with supportive community organizations/agencies and feedback from community leaders and city officials), PIE-NC has concluded there has been a growing need for the underserved youth in this area. The increasing rates of disconnected students are viewed to coincide with other social community issues.

The target population will reflect the demographics of the Charlotte-Mecklenburg area schools with an anticipated target enrollment breakdown as follows:

African-American: 38%

American Indian/Multi-racial: 3%

Asian: 6%

Hispanic: 24%

White: 29%

In determining an exact school location, PIE-NC has determined that the West Charlotte corridor neighborhoods (zip codes 28216, 28026, 28208, etc.) are most suitable for consideration due to their identification as the neighborhood clusters in the Charlotte metropolitan area having the highest



percentage of disconnected youth in North Carolina, according to "Halve the Gap by 2030: Youth Disconnection in America's Cities," a comprehensive study done by Measure of America (Burd-Sharps & Lewis 2013, page 97).

According to the 2018 Data.Census.Gov, the dropout rate in the West Charlotte area is above 12 percent (2018, page 1). PIE-NC is designed to provide educational programming and opportunities to at-risk students to reduce dropouts and increase postsecondary goal attainment. PIE-NC will meet the needs of students served by providing a comprehensive education program and flexible learning environment. This educational model will provide students with the skills and knowledge necessary to graduate from high school and to successfully meet postsecondary education or career goals.

PIE-NC has selected the Charlotte-Mecklenburg area as a whole, based on the population of disconnected youth, which according to the 2013 Measure of America study, is one of the highest in the nation, with 17.3 percent of the area's youth ages 16-24 not in school or gainfully employed. When dividing the data into demographic groups, the study found that 21.4 percent of Black youth and 16.7 percent of white youth-in the Charlotte area were identified as disconnected, both of which contribute to the Charlotte Metro area being identified as having one of the highest rates of disconnection among the twenty-five largest metro areas in the nation (Burd-Sharps & Lewis 2013, page 3). In addition, 14 percent of the population are living below the poverty line, according to the U.S. Census. All citations are referenced in Appendix O in the section titled "References."

Q157. Provide the break-even point of student enrollment

The school would be at the break-even point with 205 students enrolled.

Q158. Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated

PIE-NC will ensure that student capacity is met and revenue matches expectations by implementing an action plan that will be developed and recommended to the governing board, for the 2022 school year if approved. The school will also engage stakeholder groups.

Q159. Does the budget rely on sources of funds other than state, county, and federal (e.g., loans, donations, etc.)? If so, please provide the source and amount. Also, describe any committed contributions and in-kind donations of goods or services to be received by the charter school that will assist in evaluating the financial viability of the school. Clearly indicate between those grants or in-kind donations which have already been firmly committed and those the board is planning to pursue. Be sure that the appropriate assurances documentation is provided in the appendices.



The budget relies on an initial loan of \$2,600,000 from PMG to underwrite expenses prior to opening the school, school payments before the receipt of state payments, and to cover start-up costs for the second site in year two. Total projected start-up costs include leasehold improvements of \$875,000, facilities of \$40,000 classroom furniture for \$80,000 and school staff salaries of \$218,178.

Q160. Provide the student to teacher ratio that the budget is built on

The budget assumes a 25:1 student to teacher ratio. The school model is designed such that actual instruction will be delivered in much smaller groups at a time.

Q161. Describe the board's individual and collective qualifications and capacity for implementing the financial plan successfully

The PIE-NC board has qualified members with diverse professional backgrounds (business, education, finance, politics, public relations, communications, and community engagement), such as Alvin Wallace, with over 30 years of banking and finance experience and currently working as a Business Support Associate at Wells Fargo in Charlotte; Kathleen Hoskin Tunson, with over 20 years of experience in marketing and communications, including for Wells Fargo, Bank of America, and First Union National Bank; Patrice McClean, Mecklenburg Career Development Coordinator; Queen Thompson, former chair of Charlotte Branch NAACP Legal Redress Committee; Tara Gibbs, Director of Christian Education; Linda Thomas, a Mecklenburg lead teacher and professional development master teacher, CMS (Professional Educator's License); and Reverend James Wilkes, ordained minister and senior pastor at Elon First Baptist Church in Guilford.

The governing board will adopt fiscal policies and procedures to ensure the most effective use of funds supports PIE-NC's mission. The board will also make sure those funds are budgeted, accounted for, expended, and maintained appropriately.

Q162. Describe how one or more high needs students with disabilities might affect the budget and your plan to meet student needs that might be more than anticipated

The higher general fund balance and reserves that the school plans to keep would offset any unexpected costs. PIE-NC will outsource related services, including but not limited to, speech therapy, counseling, and occupational therapy. If the needs of a student affect the budget, PIE-NC will pursue additional funding to strengthen its financial position. To illustrate the ability for PIE-NC and PMG to meet financial needs, if anticipated revenues are not received or are lower than estimated, a start-up budget and Year One cash flow contingency are provided in the budget workbook and budget narrative in Appendix M.

Q163. If there is a plan to outsource any or all financial management areas such as payroll, benefits, audits, fundraising, accounting, etc., provide a statement on how the vendors will be selected and how the board



will oversee their activities to ensure fidelity and compliance.

PIE-NC Board of Directors will oversee and ensure that PMG is responsible for serving certain operational needs of the charter school. As approved by the board of directors, PMG will help manage the charter school's day-to-day operations pursuant to a management agreement for such services (CMO).

Throughout the year, PMG will provide academic and financial reports to the board for review. Each year, PIE-NC's board shall hire a qualified CPA to audit the charter school's financials and shall use this audit to evaluate PMG's performance as the charter school's back office accounting service-provider. Additionally, PMG shall provide an academic performance report for an accountability review by PIE-NC's board. The board will provide oversight of PMG through their regular board meetings and review of budgetary and operational items.

Q164. Does the school intend to contract for services such as student accounting and financial services, exceptional children instructional support, custodial etc. Describe the criteria and procedures for the selection of contractors and large purchases

When making purchases, PIE-NC will follow its procurement policies and procedures which reflect applicable state and local laws and regulations. The board has a legal and ethical responsibility to assure the wise and appropriate use of public funds. The board, or its designee, reserves the right to determine what is in the best interest of the school. PIE-NC shall at all times adhere to the bidding requirements for the procurement of goods and services as set out in state law.

Q165. Explain how the budget aligns with the school's mission, curricular offerings, transportation plans, and facility needs

The budget aligns with the school mission by allocating funds to hire experienced teachers to deliver core courses and several CTE areas so students will have multiple career options. PIE-NC will provide extra teachers, as needed, so students with disabilities will receive additional support to ensure their success. The budget aligns with the curricular offerings by providing the correct number of teachers to cover the core curriculum and CTE courses that are required for students to meet all graduation requirements and complete CTE certifications (N.C. Gen. Stat. Ann. –§ 115C-156.2). The budget reflects the school's transportation plans for providing weekly and monthly CATS passes on an as needed basis. The budget will provide funding for facilities, and the budget process will involve a full discussion of the all operational elements of the school.

Q166. What percentage of expenditures will be the school's goal for a general fund balance? Describe how the school will develop the fund balance.



It is the desire of the board of directors that PIE-NC maintain a fund balance of between five and seven percent. This growing fund will be available in the case of enrollment shortages, gaps, or delays in funding sources. The fund will also allow the board to make decisions on issues that might arise regarding transportation, support for students with special needs, or other unforeseen expenses. The board of directors will use sound financial principles to ensure an annual balanced budget. PIE-NC plans to develop partnerships in the community to have services and course materials (CTE and dual certification) as needed.

Q167. Provide a description of proposed financing structure. Include financing of facilities, other asset financing and leases

The loan in the amount of \$2,600,000 will be at a per annum interest rate of 50 percent of the lowest corresponding applicable Long-Term Federal Rate posted by the Internal Revenue Service and will be paid back within five years.

Q168. Will the school have assets from other sources (e.g. building, furniture, chairs, computers, etc.)? If yes, please provide a list. Note which are secured and which are anticipated, and include evidence of commitment for any assets on which the school's core operation depends.

The school will not have assets from other sources.

12.3. Financial Compliance

Q169. How will the school ensure adequate internal controls, including segregation of duties, safeguarding of assets, accurate and adequate recording keeping?

Financial Reporting: The governing board of the school will adopt fiscal policies and procedures. Records will be maintained in compliance with all North Carolina statutes and not-for-profit Generally Accepted Accounting Principles ("GAAP"). The charter school's financial information will be maintained using Microsoft Dynamics-Navision-Æ as the financial reporting system. This includes accounts payable, accounts receivable, cash management, order entry, inventory control, and general ledger. PIE-NC will use Workday for payroll processing. All transactions will be accounted for using the guidelines of GAAP. At each of the state required reporting periods, PIE-NC will submit reports according to the prescribed methods required by CMS and/or by the NCDPI.

Administrative Services: PMG has developed a set of written policies and procedures for accounting, which address internal controls and have been reviewed by independent auditors. PIE-NC administrators will focus on the educational components of the program of the charter school and outsource the accounting and human resource functions to PMG. Reporting will be made on a quarterly basis to PIE-NC's leadership



team and its board. Accounting personnel will follow PIE-NC's policies and procedures, and compliance with these procedures is a part of the annual review process for all personnel. The PIE-NC board of directors determines the policies regarding persons who are authorized to sign contracts. All checks written by the accounting staff will use pre-numbered check stock. The bank accounts will be monitored on a daily basis to ensure no fraudulent checks have been presented to the bank and paid. Upon receipt of the monthly bank statements, a reconciliation of bank to books will be completed using the software in the general ledger system.

Legal Compliance: PIE-NC will maintain adequate records and policies to ensure compliance with all applicable local, state, and federal legal requirements, including the specific requirements of the Charter Agreement. PIE-NC will allow its independent auditors access to school and corporate records to ensure compliance during its yearly audit and evaluation.

Q170. Provide any known or possible related party transactions (relationship, description of transaction and estimated dollars involved)

None N/A

Q171. Provide the name of the firm approved by the NC Local Government Commission (LGC) that will conduct the audit. Include the complete mailing address, telephone number and fax number. If a firm has yet to be identified, please list the firms the board has investigated

TBD



13. Other Forms


Q172. Sign the attached Charter School Required Signature Certification document and upload it as a PDF or image file.

Upload Required File Type: pdf, image Max File Size: 30 Total Files Count: 1

Resources :



Evidence :


PIE- NC _Charter School Require...


Q173. Sign the attached Contracting Certification Form document and upload it as a PDF or image file.

Upload Required File Type: pdf, image Max File Size: 30 Total Files Count: 1

Resources :



Evidence :


PIE- NC _Contracting Certificatio...



14. Third-party Application Preparation

Q174. Was this application prepared with the assistance of a third-party person or group?

Yes

No

Q175. Give the name of the third-party person or group:

Q176. Fees provided to the third-party person or group:



15. Application Fee

Pursuant to G.S. 115C-218.1(c) the charter school applicant must submit a \$1000 application fee to the Office of Charter Schools. The applicant must submit their application fee by **July 24, 2020 at 5:00 pm EST** for Fast Track and Accelerated applications, and **July 24, 2020 at 5:00 pm EST** for traditional timeline applications. Payments will be accepted in the form of a certified check. Cash is not accepted.

Q177. *Application Note: The applicant must mail the certified check along with the Application Fee Payment Form before or on the due date of July 24, 2020 at 5:00 pm EST for Fast Track and Accelerated applicants, and July 24, 2020 at 5:00 pm EST for traditional timeline applicants. Failure to submit payment by the stipulated timeline to the Office of Charter Schools will deem the application incomplete. Payments should be made payable to North Carolina Department of Public Instruction:

North Carolina Department of Public Instruction

Office of Charter Schools

6307 Mail Service Center

Raleigh, NC 27699-6307

I understand

Comments :

See Appendix O for references and all other forms.

Evidence :


Appendix O.7- Application Fee


Appendix O-Other Forms and Ev...



16. Signature page

Q178. **Fill out the attached resource and get it signed and notarized. Then upload as a PDF or image file.**

Upload Required File Type: pdf, image Max File Size: 30 Total Files Count: 1

Resources :



Evidence :



Q179. **Complete**

I have finished the application

* Q180. **Outline the board's procedures for hiring and dismissing school personnel, including conducting criminal background checks.**

All open teaching positions will be posted on the PIE-NC website and also on education-oriented and general-interest job sites. The school will also use word-of-mouth advertising, referrals from other professionals, and direct contact to qualified prospects to fill available positions. Job postings will be posted to school staff members first, and all staff members that apply will be interviewed and considered for internal positions. The principal will vet candidates, participate in the interview process, and recommend the candidate of choice to the board of directors. Once the candidate has been approved by the board the offer of employment is made conditional upon a clear criminal background check, which includes fingerprinting, drug test, past employment verification, reference checks, and a TB risk assessment. Newly-hired teachers will participate in a training program, prior to the start of the school year, to learn the PIE-NC curriculum, instructional model, and data-tracking systems.

PIE-NC will not hire any person who has been convicted of a violent or serious crime. The principal will monitor compliance with this policy and report to the board of directors on a regular basis, and the board will monitor the background clearance of the principal.



PIE-NC provides annual employment contracts, but contract renewals are not guaranteed. Teachers will be evaluated in the fall and spring by their supervisor or principal with written evaluations completed prior to contracts being offered or renewed for the next school year. According to the North Carolina State Board of Education, teachers who have SP1 status will be evaluated through the Beginning Teacher Support Plan. Evaluations will be compiled for all teachers prior to the end of the school year with employment recommendations for the next school year. The board will evaluate changes and improvements to the employee compensation package, and employees will be notified of rehiring decisions no later than 30 days prior to the end of the school year.

4.3 Civil Liability and Insurance

The Nonprofit shall name the SBE as an Additional Named Insured to their liability coverage for operation of a charter school while obtaining and maintaining insurance at a minimum in the following amounts:

- a. Errors and Omissions: one million dollars (\$1,000,000) per occurrence;
- b. General Liability: one million dollars (\$1,000,000) per occurrence;
- c. Property Insurance: For owned building and contents, including boiler and machinery coverage, if owned;
- d. Crime Coverage: no less than two hundred fifty thousand dollars (\$250,000) to cover employee theft and dishonesty;
- e. Automobile Liability: one million dollars (\$1,000,000) per occurrence; and
- f. Workers' Compensation: as specified by Chapter 97 of NC General Statute, Workers' Compensation Law.

1. Complete the table below, indicating the amount of each type of coverage as outlined in a quote obtained from an insurance provider.

Area of Proposed Coverage	Proposed Amount of Coverage	Cost (Quote)
Comprehensive General Liability	\$1,000,000.00/occurrence	\$1,788
Officers and Directors/Errors and Omissions	\$1,000,000.00/occurrence	\$400 (approx.)
Property Insurance		\$1,600 (approx.)
Automobile Liability	\$1,000,000.00/occurrence	\$96 (Hired & Non-Owned Auto Only)
Crime Coverage Minimum/Maximum Amount	\$250,000.00 \$250,000.00	\$483
Worker's Compensation	\$500,000	\$3,150 (approx.)
Other Coverage		\$963
Total Cost		\$8,245

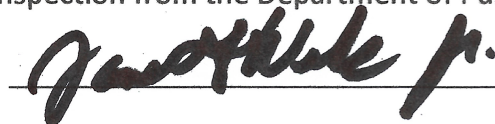
***Attach Appendix L: Insurance Quotes**

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

4.4 Health and Safety Requirements

All public charter schools are required to follow the regulations regarding health and safety as stated in G.S. 115C 218.75.

We, the Board members at Pathways In Education-North Carolina will develop a written safety plan and policies to be shared with staff, parents and students and be available upon inspection from the Department of Public Instruction and local Health Departments.



Board Chair Signature

7-22-20

Date

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

4.3 Civil Liability and Insurance

The Nonprofit shall name the SBE as an Additional Named Insured to their liability coverage for operation of a charter school while obtaining and maintaining insurance at a minimum in the following amounts:

- a. Errors and Omissions: one million dollars (\$1,000,000) per occurrence;
- b. General Liability: one million dollars (\$1,000,000) per occurrence;
- c. Property Insurance: For owned building and contents, including boiler and machinery coverage, if owned;
- d. Crime Coverage: no less than two hundred fifty thousand dollars (\$250,000) to cover employee theft and dishonesty;
- e. Automobile Liability: one million dollars (\$1,000,000) per occurrence; and
- f. Workers' Compensation: as specified by Chapter 97 of NC General Statute, Workers' Compensation Law.

1. Complete the table below, indicating the amount of each type of coverage as outlined in a quote obtained from an insurance provider.

Area of Proposed Coverage	Proposed Amount of Coverage	Cost (Quote)
Comprehensive General Liability	\$1,000,000.00/occurrence	\$2,130
Officers and Directors/Errors and Omissions	\$1,000,000.00/occurrence	\$425 (approx.)
Property Insurance		\$1,906 (approx.)
Automobile Liability	\$1,000,000.00/occurrence	\$105 (Hired & Non-Owned Auto Only)
Crime Coverage Minimum/Maximum Amount	\$250,000.00 \$250,000.00	\$500
Worker's Compensation	\$500,000	\$3,148 (approx.)
Other Coverage – Sexual/Physical Abuse	\$1,000,000	\$982
Total Cost		\$9,196

***Attach Appendix L: Insurance Quotes**

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

4.4 Health and Safety Requirements

All public charter schools are required to follow the regulations regarding health and safety as stated in G.S. 115C 218.75.

We, the Board members at **Pathways in Education-North Carolina** will develop a written safety plan and policies to be shared with staff, parents and students and be available upon inspection from the Department of Public Instruction and local Health Departments.



Board Chair Signature

5/13/20

Date



Public Schools of North Carolina
State Board of Education
Department of Public Instruction

4.4 Health and Safety Requirements

All public charter schools are required to follow the regulations regarding health and safety as stated in G.S. 115C 218.75.

We, the Board members at Pathways In Education-North Carolina will develop a written safety plan and policies to be shared with staff, parents and students and be available upon inspection from the Department of Public Instruction and local Health Departments.



Board Chair Signature

7-18-20

Date

Appendix A – Evidence of Parent and Community Support

Pathways In Education – North Carolina



Pathways In Education – North Carolina

Appendix A: Evidence of Community/Parent Support. Provide evidence that demonstrates parents and guardians have committed to enrolling their children in your school. You must provide evidence through a narrative or visual of this educational need through survey data, or times and locations of public meetings discussing this proposed charter school. (Please do not provide more than one sample survey form).

Community and parent support in the East and West Charlotte Corridor and the City of Charlotte for PIE-North Carolina has been tremendous. The overwhelming consensus from parents, residents, and community leaders is that West Charlotte, in particular, needs a high-performing dropout prevention and credit recovery alternative charter school to serve at-risk high school students. According to the Measure of America report “Zeroing in on Place and Race,” nearly 20% of youth and young adults in Charlotte between the ages of 16 and 24 are not in school and/or are unemployed. This is compared to the national average of 13%. The West Charlotte Corridor represents a great portion of this percentage. As a result, parents and community members have expressed a grave concern that student retention rates are low and credit-deficient students are slipping through the cracks. There is also the fear that these students are falling into a cycle that is highly detrimental to themselves and the community. Some of the concerns expressed in our sessions have been as follows:

- Elevated dropout rates
- Youth/Young adult unemployment
- Increased gang activity
- Increased violent crimes and misdemeanors
- Increased suicide rates amongst teens (Mecklenburg County ranks #1 in NC)
- Increased mental health issues
- Social justice and equity concerns for youth/young adults
- Community disenfranchisement
- Socio-economic crisis
- Lack of workforce development opportunities

The shared belief by the community is that a non-profit public charter school would make a great difference for students in this area. A Pathways In Education-North Carolina (PIE-NC) school, developed in partnership with parents and the community, would provide the support and opportunities needed to make a sustained impact.

Dates and Locations of Public Forums Regarding PIE-North Carolina:

<u>Date</u>	<u>Time</u>	<u>Location</u>
2/7/2019	6 pm	Greater St. Paul's Church
2/16/2019	2 pm	Beatties Ford Road Regional Library
3/12/2019	6 pm	The Park Church
3/31/2019	3 pm	New Life Gymnasium
4/11/2019	7 pm	New Life Gymnasium
4/27/2019	2 pm	Julia's Café and Books
5/18/2019	3 pm	The Freedom House
6/13/2019	6 pm	Anntony's Café
6/23/2019	4 pm	Blackwell Community Home
6/29/2019	11 am	Beatties Ford Road Regional Library
7/18/2019	6 pm	Friendship Enrichment Center
8/3/2019	2 pm	McCrorey Family YMCA
10/27/19	3 pm	Grier Heights Community Center
12/6/19	7 pm	Blackwell Community Home
1/25/20	1 pm	Friendship Enrichment Center
2/28/20	6 pm	Zoom Conference
3/29/20	2 pm	Zoom Conference
5/30/20	1 pm	Conference Call
7/20/20	2 pm	The Park Conference Center

List of Partnering Organizations/Agencies of Support

- Time Out Youth
- YADAH Youth Initiative Group
- Saving Our Seed (SOS) -Parent Organization
- Parks and Recreation
- Interdenominational Ministerial Alliance
- Johnson C. Smith University
- SECU Youth Center
- Teen Health Connection
- Department of Applied Leadership and Community Development
- Clinton College
- YMCA
- 100 Black Men of Charlotte
- 100 Black Men of America
- The Dell Curry Foundation
- The Mint Museum

- Community Link
- Crisis Assistance Ministry
- Hands On Charlotte
- Friendship Community Development Corp
- Loaves and Fishes
- Athletes United For Youth Foundation
- Mental Health America of the Central Carolinas
- NAMI Charlotte and Families Forward Charlotte

Parent and Community Involvement

PIE-NC's student recruitment and enrollment plan is well defined, strategic, and designed to reach students across various demographics within the targeted geographic areas of East and West Charlotte. The marketing strategy includes reaching prospective students across the zip codes of 28212, 28205, and 28216 through multiple modalities including community meetings, school events, web information, email communications, and mailed advertisements including pamphlets and fliers. Communication efforts and all promotional materials will be available in English and Spanish.

In order to actively communicate with and engage parents and the community, and ultimately to recruit students, PIE-NC will engage in following outreach activities: 1) establish a local presence and participate in community events, 2) create partnerships with community colleges and nonprofit organizations and 3) advertise and promote in public spaces as well as online and through social media. PIE-NC expects to meet enrollment targets through these efforts.

PIE-NC will encourage parent involvement in the school to promote a secure, academically focused school climate and culture and to support students' independent and classroom study. The school will seek parental input in making school decisions, including those that promote parent participation for all student subgroups. Workshops to help parents support their student academically, as well as to support their post-secondary dreams will be provided (study skills, college financial aid, language skills, basic computer skills, etc.). Back to School family nights, open houses, and community fairs will be formal events where all school stakeholders come together to share both progresses made and areas of concern. These parent outreach opportunities will create positive and meaningful experiences for our families. Parents will be given suggestions about ways they can support the learning process, and a written report of student progress can be provided to parents upon request. Regular communication with parents will occur through phone calls from teachers, quarterly newsletters, progress reports, school and home visits. The PIE-NC staff will notify parents immediately when problems with attendance, academic progress, or personal issues arise. Student Advisors will hold meetings with parents and guardians to help guide them through post-secondary and financial aid options, as well as host quarterly parent information meetings.

Parents will be able to provide feedback to PIE-NC via a number of parent information sessions scheduled throughout the year, including open house and back to school events and parent university meetings where parents can learn more about comprehensive learning opportunities.

PIE-NC parents will also be invited to participate on the Community Advisory Council (CAC) which will consist of parents/guardians, local community members, teachers, and student representatives. The committee meets quarterly to discuss and make recommendations that address challenges for youth in Mecklenburg County and increase school visibility. The CAC will give parents/guardians and community members the opportunity to provide advice and counsel to school personnel. The results of annual surveys will be shared with the CAC and their recommendations for improvement will be sought. The CAC will also plan and facilitate the following:

- Community service projects with students and teachers
- Extracurricular experiential learning opportunities
- Fundraisers
- Small group parent support teams
- Teacher and Staff Appreciation Day
- You ROCK Student Appreciation Day

Dorothy W. Able
Owner/Director
An Angel's Touch Youth Enrichment Program
101 Suite #2 W. Sugar Creek Rd., Charlotte NC 28213

July 17, 2020

To Whom It May Concern;

I am writing in support of Pathways in Education NC (PIE-NC). Our city has a large number of students, especially in the middle and high school age range that could greatly benefit from a school such as PIE-NC.

I believe a school such as PIE-NC introduces a new level of choice, innovation, and diversity in learning to those students who, for whatever reason, are not fully benefiting from the traditional way of learning. The structure of academics, and the design of the planned curriculum will be of great benefit to the student population served by the school. I appreciate that the parents will be encouraged to participate in the learning process as well, and the sense of "community" that will be developed from that relationship.

Working with preschool and elementary school aged youth in one of the underserved parts of the city, I understand the importance of identifying those organizations that will serve the community, city, the state and beyond that will have a large impact in the future of our young and maturing learners. That being the case, I see PIE-NC as a viable partner in helping our city's youth reach their full potential.

PIE-NC has the full support of An Angel's Touch Youth Enrichment Program, and we look forward to welcoming them to Charlotte, NC.

Sincerely,



Dorothy W. Able

Email: realliveangels@yahoo.com

Ph: 704-493-3143

"Empowering Youth Today for a Better Tomorrow"

July 19, 2020

To Whom It May Concern:

My name is Gary O. McCluney, the founder and former Executive Director of Youth Empowered to Bring Change, Inc. The purpose of this missive is to show my support for Pathways In Education, NC.

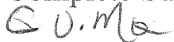
From the perspective of the former youth advocacy group leader, I believe that the mission and vision of Pathways in Education School is what is needed to give our youth the proper opportunity they need to accomplish their goals and to compete in this world. Students need the personalized attention and support that this school is projected to offer. Not taking away from other schools, however, we see day after day that our students need a little more encouragement and support that they may not be able to receive from other public schools.

From the perspective of the parent of a middle school student, I see the importance of having the personalized dedicated attention and support from teachers with smaller class sizes. I made the decision last school year to take my son out of CMS system and placed him in a charter school near my home. While in CMS, it was determined that my son needed to be placed on a daily ADHD medicine that would help him to focus. After making the decision to enroll him in the charter school, I explained to his teachers and counselors that he was prescribed this medicine. I was advised that they would do all that they can to assist him without the medicine; and they did just that. I share this testimonial because I see the need for more charter schools that will be able to assist our students who would otherwise fall through the cracks and just "get by" in larger schools.

In closing, I am in complete support of Pathways in Education schools. I believe that their blended learning plans and structure are just what's needed to help catapult our students to the next level. I believe they will enhance our community and state with their presence and expertise.

Thank you in advance for your consideration and partnership. If you have any questions or concerns, please feel free to contact me at Gary5875@yahoo.com.

In Complete Support,



Gary O. McCluney



Inspire & Empower

Today is the Best day of the Rest of
Your Life

July 23,2020

To whom it may concern

Inspire & Empower co-founder Charles Gooden would first like to extend our appreciation and gratitude. We are looking forward to the opportunity to partner with and support Pathways In Education - North Carolina.

We are committed to serving with Pathways In Education –North Carolina in the vision of empowering our undeserved and at –risk youth throughout Charlotte NC.

Our Mission in partnership is to be an inspirational model of living and working together to create social change within the community.

We desire to create an environment of personal and culture change that will mutually supports each other in context of community. We embrace the chaos and emotional challenges to create a platform of One (1) through transparency and honest reflection. Moreover, our goal is to promote a nurturing environment where all are accepted by the community. It will reinforce acceptance which leads to acceptance of diversity. We are committed to a global community founded in collaboration and co-empowered leadership. Our core is founded on the creation of environment which encourages exploration, curiosity, and creativity with support to educational gathering, meetings, workshops, classes and other similar events to carry out the mission.

Vision

We envision a world culture grounded in Love. It is to embody compassion, honesty, unselfish-responsibilities, delight in diversity, cooperation, and the honoring of all living things.

The vision recognizes the interconnectedness of all people being supported and connected from the framework of equality.

Sincerely,

Tasha M. Gooden

1045 Anduin falls Drive
Charlotte, NC 28269

Phone: 704-201-2204
tashacharles@carolina.rr.com



July 16, 2020

This letter serves as an affirmation of the Pathways-In-Education Charlotte Charter School in the East Charlotte (28212) community.

I lost my only son to senseless gun violence in Charlotte five years ago. That experience has changed my life forever. I am still haunted by the phone call from one of his friends screaming that Daniel had been shot. I will never forget frantically pacing the emergency room that night at Presbyterian Hospital only to be told that my son didn't make it. It still haunts me to this day.


There has been a recent rise in gun violence among the youth in the East and West Charlotte communities. I'm a part of a group of mothers who have tragically lost their children to gun violence. We are hopeful that a Pathways School may become a part of our community and impact the lives of these young people. We, the Save Our Youth organization of East Charlotte plan to volunteer and do whatever we can to support Pathways In Education Charlotte.



Thank you for your consideration.

Chandra Pretty, Chair 

(704) 277-4857

Dansangel19@gmail.com


Ruth Harris
Martina Rose
Ava Maroon
Jae Tiger
Jelly Ann


Leni Wright

Sherry Nolan
Kimberly Foster
Jessie Phillips
Babara Hill

June 29, 2020

To: The NC Office of Charter Schools

From: Reverend William H. Russell


My name is William Russell. I am a lifelong native of Charlotte, NC. I grew up in the East Charlotte Corridor. I am a former drug dealer and gang leader. As a product of low-income housing, economic inequities, and lack of opportunities, I felt that I had no other choice but to engage in inappropriate activities in order find acceptance and to help my grandmother make ends meet.

I was labeled early on by the school system. I felt like an outcast in my academic environment. I wonder how different my life would have been back then had I had the opportunity to attend a school like Pathways In Education-Charlotte. Not only would things have been better for me, but it also would have been much easier for my grandmother who raised me.

I turned my life around and made it my life's work to be an advocate for young people who are underserved and deserve a chance. I have been a community organizer and worked in Street Ministries in Charlotte for over 30 years. I have established a mentorship program for at-risk youth, training opportunities for parents, literacy programs that include financial literacy, and life-skills workshops.

Pathways In Education- Charlotte maintains the guiding principals that I espouse and targets the same demographic that I serve. I pledge to partner with Pathways and welcome them wholeheartedly into the Charlotte community.

Sincerely,


William H. Russell "Bill"

Founder of Back on the Block, Inc.

Wmrusell66@gmail.com

(803) 849-0055

Appendix A4.1 –CMO/EMO Contract (PMG & PIE North Carolina- Management Contract)

Pathways In Education – North Carolina

MANAGEMENT SERVICES AGREEMENT BETWEEN
PATHWAYS MANAGEMENT GROUP, INC.,
AND
PATHWAYS IN EDUCATION – NORTH CAROLINA, INC.

This MANAGEMENT SERVICES AGREEMENT (“Agreement”) is made and entered into on July 16, 2020 and effective, upon the Pathways in Education – North Carolina charter petition date of acceptance by the North Carolina Office of Charter Schools. This agreement is between Pathways Management Group, Inc., a California nonprofit corporation (“PMG”), and Pathways in Education – North Carolina, Inc., a North Carolina nonprofit corporation (“PIE-NORTH CAROLINA”) with reference to the following:

RECITALS

WHEREAS, PMG provides management and other services to charter schools and has expertise in providing educational services to at risk students using independent study instructional modalities;

WHEREAS, PIE-NORTH CAROLINA was created to develop new ways to educate children in North Carolina through the establishment of and/or operation of charter schools;

WHEREAS, PIE-NORTH CAROLINA is actively seeking to establish a charter to serve students under the purview of the North Carolina School District;

WHEREAS, the charter petition submitted by PIE-NORTH CAROLINA will set forth the governance structure for the charter school and provide, among other things, that the management and day-to-day operation of the charter school may be delegated to third parties;

WHEREAS, PIE-NORTH CAROLINA desires to contract for services, including school management, facilities management, financial management, accounting, student achievement reporting and human resources services;

WHEREAS, the parties intend that the terms of this Agreement shall be consistent with the terms of any charter petition approved by the North Carolina Office of Charter Schools.

NOW, THEREFORE, the parties hereto agree as follows:

ARTICLE 1

1.1 **Charter Petition.** The parties understand and acknowledge that PIE-NORTH CAROLINA may be bound by and subject to, all the terms and conditions of the Charter Petition or charter agreement between PIE-NORTH CAROLINA and the North Carolina Office of Charter Schools (hereinafter referred to as the “Charter Petition”) and that by entering into this Agreement, PMG’s services shall comply with the applicable terms and conditions of the Charter Petition.

1.2 **Independent Contractor.** The parties to this Agreement intend that:

1.2.1 The relationship between PMG and PIE-NORTH CAROLINA created by this Agreement is that of an independent contractor, and not a partnership or employer- employee or

other relationship. No agent, employee, or servant of PMG shall be deemed to be the employee, agent or servant of PIE-NORTH CAROLINA. The manner and means of conducting the work pursuant to this Agreement is under the sole control of PMG and PMG will be solely and entirely responsible for its acts and for the acts of its agents, employees, servants, and subcontractors during the entire Term of this Agreement; and,

1.2.2 No agent, employee, or servant of PIE-NORTH CAROLINA shall be deemed to be the employee, agent or servant of PMG. PIE-NORTH CAROLINA will be solely and entirely responsible for its acts and for the acts of its agents, employees, servants, and subcontractors during the entire Term of this Agreement.

ARTICLE 2 TERM

2.1 Unless earlier terminated pursuant to this Agreement, the term (“Term”) of this Agreement shall commence on the date PIE-NORTH CAROLINA is awarded a charter from the North Carolina Office of Charter Schools (the “Commencement Date”), and shall expire at midnight on the fifth anniversary of the Commencement Date (“Expiration Date”), provided however, that in the event PIE-NORTH CAROLINA shall at any time cease to be chartered by the North Carolina Office of Charter Schools, this Agreement shall terminate thirty (30) days following the effective termination date of PIE-NORTH CAROLINA’s charter. No later than eighteen (18) months prior to the Expiration Date, PIE-NORTH CAROLINA will schedule a meeting with PMG to discuss renewal of the Agreement. Following the meeting, if PIE-NORTH CAROLINA or PMG decide to forego renewal, the forgoing party will inform the other party in writing no less than twelve (12) months before the Expiration Date of this determination, or this Agreement will automatically renew for an additional five (5) year term.

ARTICLE 3 SERVICES TO BE PROVIDED BY PMG

3.1 During the Term of this Agreement, except as otherwise provided herein, PMG shall provide to PIE-NORTH CAROLINA as more specifically described herein below, school management, facilities management, financial management, accounting, student achievement reporting and human resources services (hereafter referred to as the “PMG Services”). Such services are more particularly identified on Exhibit “A,” which is attached hereto, and incorporated herein.

ARTICLE 4 PMG COMPENSATION

4.1 For the first year commencing _____, on the 5th day of each calendar month during the Term of this Agreement, PIE-NORTH CAROLINA shall cause to be paid to PMG a monthly fee of ten (10%) percent of the monthly gross revenue generated by PIE-NORTH CAROLINA for PMG Services. The monthly fee will be in addition to PIE-NORTH CAROLINA’s obligation to reimburse expenses as provided hereinafter. The monthly fee for the PMG Services may, at the discretion of PMG, automatically increase on June 1 of every year to adjust for federal cost of living adjustments, but shall not increase by more than five percent (5%) per year, and shall under no circumstances exceed fifteen (15%) of the school’s revenue for the fiscal year.

4.2 PIE-NORTH CAROLINA shall not be responsible for payment of the compensation referred to herein until PIE-NORTH CAROLINA obtains start-up, grant, or general funding.

ARTICLE 5 FACILITIES MANAGEMENT SERVICES

5.1 PMG shall be responsible for the identification, location and acquisition of space for PIE-NORTH CAROLINA learning centers.

5.2 PIE-NORTH CAROLINA shall reimburse PMG or pay directly any and all rentals (including common area charges and other charges assessed directly by the landlord as part of each respective lease) advanced by PMG for the use of commercial premises for PIE-NORTH CAROLINA learning centers and/or school site(s). PMG has or may enter into and shall maintain for the benefit of PIE-NORTH CAROLINA leases of commercial real property and office space to provide learning centers and/or school site(s) for the students of PIE-NORTH CAROLINA. PIE-NORTH CAROLINA shall reimburse PMG or pay directly any and all costs associated with general contracting and construction related services, including, but not limited to construction management services, construction consulting services, construction, demolition, renovation, and remodeling.

5.3 PIE-NORTH CAROLINA shall also reimburse PMG or pay directly all expenses for utilities, including telephone, power, water, trash and other utilities used in connection with the foregoing learning centers.

5.4 PIE-NORTH CAROLINA acknowledges that the terms of certain leases held by PIE-NORTH CAROLINA at the time of this Agreement may expire or terminate prior to the end of the Term of this Agreement. In such event, PMG agrees to locate and secure, on behalf of PIE-NORTH CAROLINA, suitable replacement premises. PMG will obtain the prior written approval of PIE-NORTH CAROLINA staff before adding or subtracting the number of learning centers used by PIE-NORTH CAROLINA.

5.5 All learning centers will meet North Carolina health and safety standards.

5.6 Facilities will be selected on the basis of identification of areas where the greatest numbers of potential students can be served.

5.7 PMG shall be responsible for the purchase and installation of technology (computers, modems, and phone units) integral to the operation of PIE-NORTH CAROLINA learning centers and PIE-NORTH CAROLINA will pay directly or reimburse PMG for these costs.

5.8 PMG shall be responsible for furnishing and maintaining PIE-NORTH CAROLINA learning centers as necessary to operate the learning centers. PIE-NORTH CAROLINA will pay directly or reimburse PMG for these costs.

5.9 PMG will secure insurance reasonably suitable to protect PIE-NORTH CAROLINA for personal and property damage caused by hazards at the learning centers. PIE-NORTH CAROLINA will pay directly or reimburse PMG for the cost of such insurance.

5.10 PMG will ensure that, at a minimum, each of the learning centers are open to teachers and students according to PIE-NORTH CAROLINA's operating schedules.

5.11 PMG and PIE-NORTH CAROLINA will enter into a separate lease agreement for PIE-NORTH CAROLINA learning centers, which leases (to the extent time remains on the lease term) will survive the terminating of this Agreement.

ARTICLE 6 STUDENT ACHIEVEMENT REPORTING

6.1 PMG shall provide information to PIE-NORTH CAROLINA's board of trustees sufficient to enable PIE-NORTH CAROLINA's board to monitor the sufficiency of services provided by PMG and whether it is in compliance with its obligations under this Agreement.

6.2 PMG shall make available to PIE-NORTH CAROLINA the following reports: monthly report of expenses incurred for reimbursement, monthly ADA or student attendance reports, reports required by the North Carolina Office of Charter Schools, budget reports, and year to date budget variance reports. Upon reasonable request, PMG shall provide additional financial data and other data to PIE-NORTH CAROLINA in a format and structure reasonably directed by PIE-NORTH CAROLINA.

6.3 PMG, at its own election or when requested by PIE-NORTH CAROLINA, will contract periodically with an independent evaluator of charter schools to conduct an independent evaluation of PIE-NORTH CAROLINA's educational programs and student achievement. The results of the evaluation will be provided to PIE-NORTH CAROLINA. This independent evaluation will examine the effectiveness and quality of the educational programs and services provided to PIE-NORTH CAROLINA students. The evaluation will use both qualitative and quantitative data. The evaluator will analyze standardized test data and incorporate the results into the evaluation. In addition, the data relating to baseline student Performance Plans; educational and community agency services rendered to PIE-NORTH CAROLINA's students; and enrollment, academic and attendance records will be analyzed. Qualitative data will be collected through structured and unstructured interviews and questionnaires with PIE-NORTH CAROLINA staff, students, parents and community agency personnel. PIE-NORTH CAROLINA shall pay directly or reimburse PMG for the cost of any evaluation(s) requested by PIE-NORTH CAROLINA. The purpose of this independent evaluator is to provide PIE-NC a method for independently evaluating PMG's work.

ARTICLE 7 EDUCATIONAL PROGRAM AND CURRICULUM

7.1 PMG has developed an educational program which consists of a unique blend of curriculum and educational materials that were carefully curated by PMG after expending significant time and effort in reviewing and analyzing various educational products available in the market. PMG has compiled a particular combination of recommended products to create an educational program menu unique for PIE-NORTH CAROLINA's use ("Program"). PMG consistently reviews the market to update and improve the Program based on the most current educational products available.

7.2 PMG agrees to make the Program available to PIE-NORTH CAROLINA throughout the term of this

Agreement.

7.3 The Program consists interesting and challenging curriculum for the purpose of allowing students to progress as quickly as their capabilities will allow. The Program will allow students to use the knowledge that they are accumulating in novel ways to facilitate problem-solving and skill development. The recommended curriculum shall be designed in a language and format that are readily accessible, and students will be allowed to complete course work at their own pace, as the Program will be formulated based on an initial evaluation of each student's skill levels in reading, math and other core courses. The key components of the Program are as follows:

7.3.1 Students will be encouraged to concentrate their learning efforts on a maximum of one or two core subjects, in order to achieve greater depth of learning in each subject and to focus the student's attention on specific areas as a way to promote maximum efficiency for faster results.

7.3.2 Students will participate in independent study programs that will allow each student to tailor his or her work pace to meet personal needs and goals.

7.3.3 Student skills are assessed at regular intervals in order to determine appropriate placement and intervention. Advancement within each course will be determined by actual mastery of skills. Learning will be focused on specific skills and tasks, which will result in maximum advancements in a minimum amount of time.

7.3.4 The Program will be nonreligious, nonsectarian and shall not illegally discriminate against any student on the basis of race, creed, color, sex, national origin, religion, ancestry, age, disability, special need, marital status, citizenship or any other legally prohibited basis.

7.4 The Program will be implemented in a manner that is consistent with the Charter Petition between PIE-NORTH CAROLINA and the authorizer and as otherwise required by law.

7.5 PIE-NORTH CAROLINA shall reimburse PMG or pay third party vendors directly for the cost of all Program related services, materials and purchasing incurred by PMG on behalf of PIE-NORTH CAROLINA. All reimbursable costs shall require prior approval from school leader. PIE-NORTH CAROLINA reserves the right to directly contract with and pay any providers of educational services or products identified by PMG as part of the recommended Program.

7.6 PMG shall contract with a service provider for the evaluation of student academic achievement and performance data for State and Federal accountability reporting purposes on behalf of PIE-NORTH CAROLINA (“Accountability Services”). PIE-NORTH CAROLINA shall reimburse PMG or pay third party vendors directly for the cost of all Accountability Services purchased by PMG on behalf of PIE-NORTH CAROLINA. Notwithstanding, PIE-NORTH CAROLINA reserves the right to directly contract with and pay any providers of Accountability Services. PMG shall manage and oversee the Accountability Services provided to PIE-NORTH CAROLINA and also act as a liaison with the service provider, whether contracted by PMG or directly by PIE-NORTH CAROLINA.

ARTICLE 8 MANAGEMENT OF THE CHARTER SCHOOL

8.1 PMG is not obligated to devote all of its time or business efforts to the affairs of PIE-NORTH CAROLINA.

8.2 PMG and its officers, directors, members, agents, employees and/or affiliates may engage or invest in any business activity of any type or description, including, without limitation, those that might be the same as or similar to the PIE-NORTH CAROLINA’s business. PIE-NORTH CAROLINA shall have no right in or to such other activities or to the income or proceeds derived there from. PMG shall not be obligated to present any investment opportunity or prospective economic advantage to PIE-NORTH CAROLINA, even if the opportunity is of the character that, if presented to PIE-NORTH CAROLINA, could be invested in by PIE-NORTH CAROLINA.

8.3 In addition to any other duties or obligation of PMG arising under this agreement, PMG shall ensure that, in the event that PIE-NORTH CAROLINA loses its charter or otherwise ceases to operate as charter school, all applicable legal requirements established by the North Carolina Office of Charter Schools or other government entity shall be met.

ARTICLE 9 PERSONNEL AND TRAINING

9.1 PMG shall recruit, screen and recommend certificated and non-certificated individuals to PIE-NORTH CAROLINA for employment by PIE-NORTH CAROLINA.

9.2 All personnel recommended by PMG for employment by PIE-NORTH CAROLINA shall have the experience and knowledge appropriate to the position for which they are to be considered for employment.

9.3 All personnel recommended by PMG for employment by PIE-NORTH CAROLINA shall meet standards set forth by North Carolina law, as applicable and such employee's particular job description. Certificated employees shall meet requirements of the North Carolina charter laws.

9.4 When necessary, PIE-NORTH CAROLINA shall work with PMG to obtain Office of Charter Schools waivers and shall work with PMG to expedite the certification process or alternative accreditation for all new or out-of-district personnel.

9.5 PMG shall provide training in its methods, curriculum, program, and technology to all teaching personnel of PIE-NORTH CAROLINA. Such training shall be at PIE-NORTH CAROLINA's expense, and may be held off-site, at locations selected by PMG. PMG will also provide team building events, at PIE-NORTH CAROLINA's expense, for the benefit of PIE-NORTH CAROLINA employees.

9.6 PMG will administer health and retirement benefits for PIE-NORTH CAROLINA's employees, including all certificated and non-certificated staff.

9.7 Personnel Policies

9.7.1 PMG and PIE-NORTH CAROLINA shall comply with all applicable federal and state laws, concerning employee welfare, safety and health, including, without limitation, the requirements of federal law for a drug free workplace.

9.7.2 Neither PMG nor PIE-NORTH CAROLINA will illegally discriminate against any employee or applicant for employment on the basis of race, creed, color, sex, national origin, religion, ancestry, age, disability, marital status, citizenship, or any other legally prohibited basis, in its recruitment, selection, training, utilization, termination or other employment-related activities.

ARTICLE 10 SUBCONTRACTING OF SERVICES

10.1 Subcontracting of Services. PMG reserves the right to subcontract any and all services specified in this Agreement to public or private subcontractors, as permitted by law.

10.2 Location of Performance. PMG reserves the right to perform non-instructional functions, such as purchasing materials or developing curriculum, off-site at PMG offices or remote locations, unless prohibited by federal, state laws, rules, or regulations.

ARTICLE 11 SCHOOL YEAR

11.1 School Year. The parties hereto agree that PIE-NORTH CAROLINA shall be in session between July 1st and June 30th of each school year in accordance with North Carolina law.

11.2 Calendar. Notwithstanding the above, the parties understand and agree that the PIE-NORTH CAROLINA will have a year-round, multi-track, staggered start calendar for the programs, or, as necessary, any other calendar that would improve the delivery of instruction to students.

ARTICLE 12 STUDENT PRIVACY

12.1 Family Educational Rights and Privacy: Act. PIE-NORTH CAROLINA shall advise the North Carolina Office of Charter Schools to designate PMG and its officers, employees, agents and representatives as having a legitimate educational interest such that they are entitled to access to education records under 20 U.S.C.A. 1232g, the Family Educational Rights and Privacy Act and

under applicable North Carolina information and privacy laws. PMG, its officers and employees shall comply with the Family Educational Rights and Privacy Act at all times. PMG and PIE-NORTH CAROLINA's obligations under applicable privacy standards are more fully defined and provided for in Exhibit B to this Agreement.

ARTICLE 13 WARRANTIES AND REPRESENTATIONS

13.1 Representations of PIE-NORTH CAROLINA. PIE-NORTH CAROLINA represents and warrants to PMG that: (i) it is an organization formed, existing and operating under the laws of North Carolina (ii) it has full lawful power and authority to execute, deliver and perform this Agreement, to incur the obligations provided for under this Agreement and to contract with PMG for PMG to provide the services set forth in this Agreement; (iii) the information, if any, PIE-NORTH CAROLINA has furnished to PMG concerning PIE-NORTH CAROLINA's finances, revenues, and student enrollment is accurate and the latest information available at the time of the execution of this Agreement; (iv) the execution, delivery and performance of this Agreement by PIE-NORTH CAROLINA is not a violation or breach of any other agreement between PIE-NORTH CAROLINA and any other person or entity.

13.2 Representations of PMG. PMG represents and warrants to PIE-NORTH CAROLINA that: (i) it is a California corporation organized and existing under the laws of the State of California; (ii) it has full lawful power and authority to execute, deliver and perform this Agreement, to incur the obligations provided for under this Agreement and to contract with PIE-NORTH CAROLINA to provide the services set forth in this Agreement on behalf of PIE-NORTH CAROLINA; (iii) the information, if any, PMG has furnished to PIE-NORTH CAROLINA concerning PMG's finances and revenues is accurate and complete and the latest information available at the time of the execution of this Agreement; (iv) the execution, delivery and performance of this Agreement by PMG is not a violation or breach of any other agreement between PMG and any other person or entity.

ARTICLE 14 INDEMNIFICATION

14.1 PMG shall indemnify and hold PIE-NORTH CAROLINA and its members, managers, employees, officers, subcontractors, agents, representatives and authorized volunteers (collectively "the PIE-NORTH CAROLINA Agents") harmless from and against any and all claims, demands, suits, costs, judgments, or other forms of liability to third parties, actual or claimed, of whatsoever kind or character, including attorneys' fees, brought against PIE-NORTH CAROLINA and/or the PIE-NORTH CAROLINA Agents for injury to property or persons, occurring or allegedly occurring in, on or about PIE-NORTH CAROLINA learning centers or through PIE-NORTH CAROLINA school programs as a result of actions by PMG and/or by its employees, officers, directors, subcontractors, representatives, and agents (collectively "PMG's Agents") during the Term of this Agreement or any renewal periods thereof. Upon timely written notice from PIE-NORTH CAROLINA, PMG shall defend PIE-NORTH CAROLINA and/or the PIE-NORTH CAROLINA Agents in any action or proceeding brought thereon with counsel reasonably acceptable to PIE-NORTH CAROLINA. For the purposes of enforcing this indemnification clause, PIE-NORTH CAROLINA shall not be considered one of "PMG's Agents" and PMG shall not claim that PIE-NORTH CAROLINA is or was PMG's Agent in order to avoid its duty to indemnify PIE-NORTH CAROLINA pursuant to this Agreement.

14.2 PIE-NORTH CAROLINA shall indemnify and hold PMG and PMG's Agents harmless from and against any and all claims, demands, suits, costs, judgments or other forms of liability to third parties, actual or claimed, of whatsoever kind or character, including attorneys' fees, brought

against PMG and/or PMG's Agents for injury to property or persons, occurring or allegedly occurring in, on or about PIE-NORTH CAROLINA learning centers as a result of actions by PIE-NORTH CAROLINA and/or by PIE-NORTH CAROLINA's Agents during the Term of this Agreement or any renewal periods thereof, unless such actions were properly taken by PIE-NORTH CAROLINA to carry out the terms of this Agreement. Upon timely written notice from PMG, PIE-NORTH CAROLINA shall defend PMG and/or PMG's Agents in any action or proceeding brought thereon with counsel reasonably acceptable to PMG.

ARTICLE 15 TERMINATION AND CLOSURE

15.1 PIE-NORTH CAROLINA Termination for Cause. PIE-NORTH CAROLINA may terminate this Agreement for Cause prior to the end of the Term, in accordance with the procedures set forth herein. For purposes of this Section, "Cause" means:

15.1.1 Material breach of this Agreement may include failure of PMG to provide services as required by this Agreement, or any other act or failure to act by PMG which undermines the joint purpose of this Agreement. PIE-NORTH CAROLINA may terminate for cause only if PIE-NORTH CAROLINA has provided PMG written notice of the material breach and has allowed PMG a reasonable period in which to remedy such breach. A reasonable period for cure under this section shall not be less than ninety (90) days. If PIE-NORTH CAROLINA can show good cause that PMG's remedial action is unsatisfactory, PIE-NORTH CAROLINA may terminate the Agreement under this paragraph pursuant to the procedure set forth in Section 15.4.

15.2 PMG Termination for Cause. PMG may terminate this Agreement for Cause prior to the end of the Term, in accordance with the procedures set forth herein. For the purposes of this Section, "Cause" means:

15.2.1 Material breach of this Agreement, which may include, but is not limited to, PIE-NORTH CAROLINA's failure to adhere to the PMG school model, , PIE-NORTH CAROLINA's failure to obtain waivers from third parties as provided for in this Agreement which PMG reasonably determines to be necessary for the implementation of PMG's Program, PIE-NORTH CAROLINA's failure to make payments as required by this Agreement; or any other failure which undermines the joint purposes of this Agreement. In determining whether PIE-NORTH CAROLINA has committed a material breach by failing to adhere to the school model or undermined the purposes of this Agreement, the parties may consider whether PIE-NORTH CAROLINA: has refused to implement recommendations PMG reasonably believes are necessary to the school model; has changed parts of the school program that are fundamental to the PMG model, and/or has brought harm to the PMG brand.

PMG may terminate for cause only if PMG has provided written notice of the breach to PIE-NORTH CAROLINA and has allowed PIE-NORTH CAROLINA a reasonable period in which to remedy such breach. A reasonable period for cure under this section shall not be less than sixty (60) days. If PMG makes a good faith reasonable determination that PIE-NORTH CAROLINA's remedial action is unsatisfactory, PMG may terminate the Agreement under this paragraph pursuant to the procedure set forth in Section 15.4.

15.3 Statutes or Legislative Changes. In the event that any enactment, repeal, promulgation or withdrawal of any federal, state, or local law, regulation, or court or administrative decision or order materially affects the operation of PIE-NORTH CAROLINA in conformity with this Agreement, or otherwise constitutes a violation of law, or otherwise has a material adverse effect on PMG's ability to operate, PMG or PIE-NORTH CAROLINA may elect to deliver written notice to the other of such changes and the resulting consequences. Upon delivery of such notice, the parties shall promptly commence negotiations in good faith regarding a mutually agreeable

approach (including without limitation, an amendment to the Agreement) to address the statutory and/or legislative changes. If despite such good faith negotiations the parties are unable to agree upon an acceptable approach to address the statutory and/or legislative changes, then either party may elect to terminate the Agreement without further obligation or liability to the other, by delivering written notice of termination to the other at least one hundred eighty (180) days in advance of the effective date of such termination, or in such lesser time as is reasonable under the circumstances. Among other events, the foregoing section applies to actions that may be made by the State Board of Education and/or Department of Education.

15.4 Termination Notice and Other Termination Procedure

15.4.1 Unless otherwise expressly provided herein, each party shall give the other party at least ninety (90) days advance written notice of a termination of this Agreement prior to the end of its Term.

15.4.2 Notwithstanding any other provision in this agreement, each party shall use its good faith best efforts to avoid a termination of the Agreement, which becomes effective during the middle of a school year because of the disruption to the educational program and the students. Therefore, in the event this agreement is terminated by either party prior to the end of the Term, absent unusual and compelling circumstances, the termination will not become effective until the end of the school year.

15.4.3 In the event of termination of this Agreement for any reason, PMG shall provide reasonable assistance to PIE-NORTH CAROLINA for up to ninety (90) days after the effective date of termination of the Agreement, to assist in the closure of the charter school and the transition of students, if necessary.

15.4.4 In the event PIE-NORTH CAROLINA terminates this Agreement prior to the end of the Term, regardless of the reason, then PIE-NORTH CAROLINA shall, for the duration of the Term, be obligated to reimburse PMG for all expenses incurred by PMG on account of the leases and all other reimbursable items listed in Article 5.

ARTICLE 16 INSURANCE

16.1 Liability Insurance

16.1.1 PMG, on behalf of PIE-NORTH CAROLINA, shall secure and maintain, insurance, including, but not limited to general liability insurance coverage for bodily injury and property damage for the protection of PIE-NORTH CAROLINA, PMG, and their respective officers, directors, board members, employees, students, teachers and volunteers. Such insurance policies shall be issued by an insurance company or companies selected by PMG and licensed to do business in North Carolina. Except as otherwise agreed in writing by PIE-NORTH CAROLINA and PMG, all such insurance coverage shall be primary insurance, with deductibles or SIR's which are outside the policy limits, and shall be occurrence based insurance (and not claims made insurance). PIE-NORTH CAROLINA shall pay directly or reimburse PMG for all costs of such insurance.

16.1.2 PIE-NORTH CAROLINA shall require that its contractors, if providing transportation or other services to PIE-NORTH CAROLINA shall name PMG and its, and their respective officers, directors, board members, employees, and agents as additional insureds under their respective commercial general liability and automobile liability insurance policies for personal injury and property damage; and if such services are provided directly by PIE-NORTH

CAROLINA rather than by contracted service, then PMG may ensure such persons shall be named as an additional insured under corresponding PIE-NORTH CAROLINA insurance policies.

16.1.3 The insurance policies maintained by each party pursuant to this Agreement shall be endorsed to state that coverage shall not be suspended, voided, canceled, or reduced, in coverage or limits, except after thirty (30) days prior written notice to PMG and PIE-NORTH CAROLINA. The parties shall furnish one another certified copies of the insurance or certificates of insurance which name one another as additional insured as additional insured and which demonstrate compliance with this Agreement.

16.2 Workers' Compensation Insurance. PMG, on behalf of PIE-NORTH CAROLINA, shall secure and maintain workers' compensation insurance covering PIE-NORTH CAROLINA employees. Such insurance policies shall be issued by an insurance company or companies licensed to do business in North Carolina. PIE-NORTH CAROLINA shall pay directly or reimburse PMG for its pro-rata share of such cost.

16.3 Coordination of Risk Management. The parties shall coordinate risk management activities with one another, which shall include the prompt reporting of any and all pending or threatened claims, filing of timely notices of claim, cooperating fully with one another in the defense of any claims and complying with any defense and reimbursement provisions of state governmental immunity laws and applicable insurance policies. The parties shall give each other prompt written notice of any claim arising out of the operation of PIE-NORTH CAROLINA learning centers. Neither PMG nor PIE-NORTH CAROLINA shall compromise, settle, negotiate or otherwise affect any disposition of any claim or potential claims asserted against it to the extent such claims are insured by or through the other party, without the approval of the other party.

ARTICLE 17 CONFIDENTIAL AND PROPRIETARY INFORMATION

17.1 Proprietary Marks and Intellectual Property. PIE-NORTH CAROLINA acknowledges and agrees as follows:

17.1.1 PMG owns, may develop, or may create certain proprietary marks during the course of this Agreement and that all proprietary rights in and to such intellectual property, including but not limited to, all trademarks, trade names, service marks, industrial designs, insignias, logos, and designations (as presently or hereafter comprised) in connection therewith (the "Proprietary Marks");

17.1.2 PMG also owns, may develop, or purchase curriculum materials, software and other intellectual property to be used in connection with PIE-NORTH CAROLINA educational programs, including but not limited to all copyrights, patents, source codes, technology and trade secrets (as presently or hereafter comprised) in connection therewith (the "Intellectual Property");

17.1.3 PMG has extensively invested in developing and improving the Proprietary Marks and Intellectual Property and in marketing, refining, advertising, promoting and publicizing the same, all of which have become well and favorably known to the public throughout the United States and elsewhere, and, as a result of such efforts, PMG has acquired valuable goodwill therein; and,

17.2 Validity and Use of Proprietary Marks and Intellectual Property. PIE-NORTH CAROLINA hereby acknowledges the validity of the Proprietary Marks and Intellectual Property identified above and acknowledges that same are the sole property of PMG. PIE-NORTH CAROLINA may use such Proprietary Marks and Intellectual Property only for so long as the right and license granted here remains in force, and only in connection with PIE-NORTH CAROLINA operations, in the manner and for the purposes specified in this Agreement. PIE-NORTH

CAROLINA, shall not, either during or after the term of this Agreement, do anything, or aid or assist any other party to do anything, which would infringe upon, harm, or contest the rights of PMG in any of its Proprietary Marks and/or Intellectual Property. PIE-NORTH CAROLINA further agrees that any additional rights that may develop in any of PMG's Proprietary Marks and/or Intellectual Property in the future, whether as trade names, trademarks, service marks, or copyrighted materials, shall inure and accrue to the benefit of PMG.

17.3 License. Subject to the terms and conditions contained herein, PMG hereby grants to PIE-NORTH CAROLINA, and PIE-NORTH CAROLINA hereby accepts from PMG, a non-exclusive license to use PMG Proprietary Marks and Intellectual Property during the Term.

17.4 Prohibitions on Use. PIE-NORTH CAROLINA agrees not to interfere in any manner with or attempt to prohibit the use of the Proprietary Marks and Intellectual Property by any other entity. PIE-NORTH CAROLINA further agrees to execute any and all other necessary papers, documents, and assurances to effectuate this purpose and agrees to cooperate fully with PMG or its agents in securing all necessary and required authority from any Secretary of State, licensing authority, or any other state or federal authority to the use of the Proprietary Marks and Intellectual Property wherever needed. The grant of the License pursuant to this Agreement, does not grant exclusivity of territory or use to PIE-NORTH CAROLINA.

17.5 Ownership of Proprietary Information. PIE-NORTH CAROLINA agrees that PMG shall own all copyright and other proprietary rights in and to the Proprietary Marks and Intellectual Property, including but not limited to all instructional materials, training materials, curriculum and lesson plans, and any other materials developed by PMG, its employees, agents or subcontractors, during the Term of this Agreement or any renewal Terms hereof PMG shall have the sole and exclusive right to license such materials for use by other North Carolina schools or customers, or to modify and/or sell such materials to other North Carolina schools and customers. PMG may disclose such proprietary information, including that which is currently in existence as well as that which may be created in the future. PIE-NORTH CAROLINA shall take all measures reasonably necessary to assure that none of its personnel or agents disclose, publish, copy, transmit, modify, alter or utilize the Proprietary Marks and Intellectual Property without PMG's prior written consent.

17.6 Unauthorized Use. PIE-NORTH CAROLINA shall promptly report to PMG any unauthorized use of PMG's Proprietary Marks and/or Intellectual Property that comes to its attention in any manner whatsoever. If requested by PMG, PIE-NORTH CAROLINA will cooperate with PMG in precluding unauthorized use of PMG's Proprietary Marks and Intellectual Property, or any confusingly similar mark or property.

17.7 Confidential Information.

17.7.1 PIE-NORTH CAROLINA acknowledges and agrees that during the Term, it will have access to certain confidential information of PMG, including but not limited to confidential or proprietary business information, curriculum materials, software, property rights and data, know-how, trade secrets, customer and vendor lists, supplier and distributor lists, billing practices and procedures, operating manuals and procedures, pricing policies, operational methods, marketing plans or strategies, financial information, budget information and procedures of PMG ("the Confidential formation").

17.7.2 From and after the commencement of the Term, PIE-NORTH CAROLINA shall keep secret and retain in strictest confidence and shall not use for the benefit of itself or others, all or any of the Confidential Information.

17.7.3 Promptly following the termination of this Agreement for any reason, PIE-NORTH CAROLINA shall immediately deliver to PMG all Confidential Information in its possession, together with all notes, records, memoranda, correspondence files and other papers, magnetic tapes,

software, discs, manuals and other information in any form relating to PMG (including all copies of these materials). PIE-NORTH CAROLINA acknowledges that it does not have and cannot acquire any rights to these materials.

ARTICLE 18 DISPUTE RESOLUTION PROCEDURE

18.1 Mediation. In the event that any controversy claim or dispute between the parties arises relating to the terms of this Agreement, or the breach thereof, the parties hereby agree to initially attempt to settle such disputes by a non-binding mediation, before a single neutral mediator (the “Mediator”), administered by J.A.M.S./ENDISPUTE. The Mediator shall be assigned at random by J.A.M.S./ENDISPUTE and shall take place within Charlotte – Mecklenburg County, North Carolina .

18.1.1 The mediation shall commence within forty-five (45) calendar days from the date of the receipt of the Mediation Demand sent by the aggrieved party (“Receipt Date”), and shall be concluded no later than sixty (60) calendar days from the Receipt Date. In determining the Receipt Date, the notice provisions of this Agreement shall apply.

18.1.2 The administrative costs of conducting the mediation shall be shared equally between the parties.

18.2 Binding Arbitration. In the event that the parties are unable to resolve any dispute regarding relating to the terms of this Agreement, or the breach thereof, through non binding mediation pursuant to Section 18.1, above, such dispute shall be determined by binding arbitration in accordance with the rules of J.A.M.S./ENDISPUTE. The parties may select any third party arbitrator, including a retired jurist, or other independent party. Any determination of the arbitrator shall be binding on the parties, and may be entered in any court with proper jurisdiction for enforcement thereof. The costs of the arbitrator shall be borne equally by the parties.

ARTICLE 19 MISCELLANEOUS

19.1 Standard of Interpretation. Except as otherwise provided herein, the parties shall perform all actions required herein in a reasonable and timely manner.

19.2 Notices. Any and all notices, demands or other communications required or desired to be given hereunder by any party shall be in writing and shall be validly given or made to another party if served either personally or, if deposited in the United States mail, certified or registered, postage prepaid, return receipt requested. If such notice, demand or other communication be served personally, service shall be conclusively deemed made at the time of such personal service. If such notice, demand or other communication be given by mail, such shall be conclusively deemed given forty-eight (48) hours after the deposit thereof in the United States mail, addressed to the party to whom such notice, demand or other communication is to be given as hereinafter set forth.

19.3 Governing Law and Construction. This Agreement shall, in all respects, be governed by the laws of the State of North Carolina applicable to agreements executed and to be wholly performed within the State of California. Nothing contained herein shall be construed so as to require the commission of any act contrary to law, and wherever there is any conflict between any provision contained herein and any present or future statute, law, ordinance or regulation contrary to which the parties have no legal right to contract, the latter shall prevail but the provision of this Agreement which is affected shall be construed and limited only to the extent necessary to bring it within the requirements of the law.

19.4 Severability. The provisions of this Agreement are severable, and if any one or more provisions shall be determined to be judicially unenforceable, in whole or in part, the remaining provisions shall nevertheless be binding and enforceable.

19.5 Arm's Length Agreement. This Agreement has been negotiated at arm's length and between persons (or their representatives) sophisticated and knowledgeable in the matters dealt with in this Agreement. Accordingly, any rule of law or legal decision that would require interpretation of any ambiguities against the party that has drafted it is not applicable and is waived. The provisions of this Agreement shall be interpreted in a reasonable manner to affect the purpose of the parties and this Agreement.

19.6 Entire Agreement. This Agreement, together with the Charter Agreement, constitutes the entire agreement of the parties with respect to the subject matter hereof and supersedes any and all other written or oral negotiations, understandings or agreements among the parties with respect to the rights and obligations assumed herein and contains all of the covenants and agreements among the parties with respect to such rights and obligations.

19.7 Binding Agreement. The party's rights and obligations under this Agreement are personal and shall not be assignable. Subject to the foregoing, each of the terms and provisions contained herein shall inure to the benefit of and be binding upon the parties hereto and their respective heirs, personal representatives, successors, and assigns.

19.8 Cumulative Remedies. No remedy conferred by any provisions of this Agreement is intended to be exclusive of any other remedy, and each and every remedy shall be cumulative and shall be in addition to every other remedy given hereunder or now or hereafter existing at law or in equity. Except as otherwise provided herein, the election of anyone or more remedies by any party, shall not constitute a waiver of the right to pursue other available remedies.

19.9 Modifications. No amendment, change or modification of this Agreement shall be valid unless in writing, stating that it amends or modifies this Agreement, and signed by all of the parties hereto.

19.10 Additional Acts. Each of the parties hereto shall execute and deliver any and all additional papers, documents and other assurances and shall do any and all acts reasonably necessary in connection with the performance of their obligations hereunder and to carry out the intent of the parties hereto.

19.11 Counterparts. This Agreement may be executed in one or more counter- parts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument.

19.12 Waiver. The waiver by any party to this Agreement of the breach of any provision of this Agreement shall not be deemed a continuing waiver or a waiver of any subsequent breach, whether of the same or another provision of this Agreement.

19.13 Captions. The captions appearing at the commencement of the paragraphs hereof are descriptive only and for convenience in reference. Should there be any conflict between any such caption and the section at the head of which it appears, the section and not such caption shall control and govern in the construction of this Agreement. The reference to paragraph numbers herein shall be deemed to refer to the numbers preceding each section.

19.14 Force Majeure. Neither party shall be liable if the performance of any part or all of this contract is prevented, delayed, hindered or otherwise made impracticable or impossible by reason of any strike, flood, riot, fire, explosion, war, act of God, sabotage, accident or any other casualty or cause beyond either party's control and which cannot be overcome by reasonable diligence and without unusual expense.

19.15 Jointly Drafted Agreement. The parties acknowledge that this Agreement is the product of the combined involvement and drafting of both parties hereto and that neither party maybe considered or deemed the primary drafter of the Agreement.

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

Pathways Management Group, Inc., a California nonprofit public benefit corporation

By: _____ Date
Title: President

Pathways in Education – North Carolina, Inc., a North Carolina Nonprofit Public Benefit Corporation

James H. Wilkes Jr. _____ 07-23-2020
By: James Wilkes Date
Title: Member of the Board of Directors

Exhibit A

PMG Services

- A. Provide access to the Program which consists of a particular combination of recommended products specifically compiled as an educational program menu unique for PIE-NORTH CAROLINA use and meets all requirements of the Charter Petition between PIE-NC and the authorizer (see Article 7).
- B. Implement, as deemed necessary, a leadership development program and youth impact program (“Extra Programs”),
- C. Periodically review the educational product market to identify appropriate curriculum and instructional materials for use in the Program and any Extra Programs (see cost allocation in section 7.5),
- D. Train PIE-NORTH CAROLINA teachers and instructional aides in delivery of the Program to students (see cost allocation in section 9.5),
- E. Provide administrative support staff to assist PIE-NORTH CAROLINA,
- F. Provide all human resources services needed by PIE-NORTH CAROLINA, including but not limited to advertising for and recruiting teachers and instructional employees, screening prospective new employees, making staffing and employment recommendations to PIE-NORTH CAROLINA, planning and conducting team building events for PIE-NORTH CAROLINA staff, and coordinating all employee benefits,
- G. Provide computers for the use of each teacher (see cost allocation in section 5.7),
- H. Provide administrative services needed for operation of the school, including program development, facilities management and management of day to day operations,
- I. Obtain waivers as may be necessary for operation of the Charter School’s multi-track calendar,
- J. Provide all accounting services, including all bookkeeping and accounting services,
- K. Arrange for an annual audit of the Charter School to be performed by an auditing firm approved by PIE-NORTH CAROLINA, and any other such audits as may be necessary according to the Agreement (see cost allocation in section 6.3),
- L. Provide to PIE-NORTH CAROLINA the following reports: monthly report of expenses incurred for reimbursement, monthly ADA or student attendance reports, reports required for the sponsoring North Carolina Office of Charter Schools, budget reports, year to date budget variance reports, quarterly reports on the account balance, quarterly reports on the contribution of excess revenues, and quarterly reports on the use of charter funds. Upon reasonable request, PMG shall provide additional financial data and other data concerning the charter school to PIE-NORTH CAROLINA in a format and structure reasonably directed by PIE-NORTH CAROLINA

- M. Locate and secure facilities adequate to meet the needs of the Charter School and the Program, lease or otherwise contract with third parties for the use of facilities for school purposes (see cost allocation in section 5.2),
- N. Provide all property management services needed to maintain the Charter School's learning centers and to keep the learning centers in clean and professional order and repair (see cost allocation in section 5.8),
- O. Furnish all learning centers with adequate desks, chairs, books, book cases and other furnishings appropriate to maintain the learning centers' clean and professional appearance and suitable for the conduct of the Charter School (see cost allocation in section 5.8),
- P. Provide computers for students in each learning center with Internet connections and printing capabilities (see cost allocation in section 5.7),
- Q. Arrange or provide IT and other technological support to the Charter School (see cost allocation in section 5.7),
- R. Procure all insurance needed for operation of the Charter School (see cost allocations in Article 16),
- S. Periodically, or as requested by PIE-NORTH CAROLINA, arrange for independent evaluations as described in the Agreement (see cost allocation in section 6.4).
- T. Provide or arrange for further instructional and operational support, program development, or administrative services as needed, consistent with the methodology established in the Agreement and subject to pricing as agreed to by the parties.
- U. In the event of a Public Records Request, PMG shall make Client records available to Client, upon Client's request.

Exhibit B

CONFIDENTIALITY APPENDIX

WHEREAS, the Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. 1232g and its implementing regulations codified at 34 C.F.R 99. 1 et seq. make personally identifiable student information in education records confidential and, subject to certain exceptions, prohibits the disclosure of such information to third parties,

WHEREAS, FERPA and its implementing regulations allow for an educational agency or institution to share personally identifiable student-level data with contractors performing work on their behalf,

WHEREFORE, Pathways Management Group, Inc. (hereinafter referred to as “PMG” and Pathways in Education-North Carolina, Inc. (hereinafter referred to as “School”) do execute this appendix (“Appendix”) subject to the terms and conditions specified herein.

1. Services Provided

This Appendix is being executed contemporaneously with a Management Services Agreement dated _____ by and between PMG and School to provide management and other services related to charter schools.

2. Privacy Compliance

This Appendix is entered into by PMG and School in accordance with the provisions of the Family Educational Rights and Privacy Act, 20 U.S.C. Section 1232(g), et seq., (FERPA) and RS 17:3914. PMG and School hereby acknowledges that all document or other material in which student information is contained or which is derived from a student’s education records are deemed confidential pursuant to FERPA and RS 17:3914 and will not be disclosed by PMG and School to any third party.

3. Access to Information and Computer Systems/Information Storage, Retention, and Disposition Policies

PMG and School shall each maintain the data, whether in hard copy or electronic form, in an area that has limited access and may only be accessed by authorized personnel. PMG and School shall not permit removal of the data from the limited access area. PMG and School will ensure that access to the data maintained on computer files or databases is controlled by password protection. PMG and School shall establish procedures to ensure that the target data cannot be extracted from a computer file or database by unauthorized individuals. PMG and School shall maintain all physical products containing student-level data in locked cabinets, file drawers, or other secure locations when not in use.

4. Audits

PMG shall permit School or its authorized representatives to carry out security or audit checks pertaining to security and usage of student data. PMG shall cooperate with School. School may request at any time an audit of student data that is in the possession of PMG. School or its authorized representative shall have access at all reasonable times on working days during working hours at business premises to employees, together with records, books and correspondence and other papers and documentation or media of every kind and employees pertaining to this Appendix that are necessary to carry out such security and audit checks. School or its authorized representatives shall have the right to reproduce and/or retain copies at its expense of any of the aforementioned information and documents.

5. Security Breach

As used in this Appendix, “Security Breach” means any act or omission that compromises either the security, confidentiality or integrity of student information or the physical, technical, administrative or organizational safeguards put in place by School and PMG that relate to the protection of the security, confidentiality or integrity of student data, or receipt of a verifiable complaint in relation to the privacy practices of School and PMG or a breach of this Appendix relating to such privacy practices.

School and PMG shall take reasonable steps and best efforts, in accordance with industry standards and applicable laws, to prevent security breaches. School and PMG shall also take reasonable steps, in accordance with industry standards and applicable laws, to immediately remedy any security breach and prevent any further security breach, each at its own expense in accordance with standard practices and applicable law.

School shall provide PMG with the name and contact information for an employee who shall serve as the primary security contact and shall be available to assist as a contact in resolving issues and fulfilling obligations associated with a security breach, as well as the name and contact information of an employee to serve this role when the primary contact cannot be available; PMG shall immediately notify School in writing of a security breach after PMG becomes aware of it; and

Immediately following the notification of a security breach, School and PMG shall coordinate with each other to investigate the security breach. School and PMG agree to cooperate in handling of the matter, including: (i) assisting with any investigation; (ii) providing physical access to the facilities and operations affected; (iii) facilitating interviews with employees and others involved in the matter; and (iv) making available all relevant records, logs, files, data reporting and other materials required to comply with applicable law or industry standards and as otherwise required and (v) providing any notices to persons or organizations affected by the security breach as required by law.

School and PMG shall ensure that all procedures implemented to address a Security Breach shall be in compliance with all applicable state and federal laws.

6. Disposal of Information

PMG agrees that at the termination of this Appendix and the Management Services Agreement, it must return all data to School in a usable electronic form, and erase, destroy, and render unreadable all School data in its entirety in a manner that prevents its physical reconstruction through the use of commonly available file restoration utilities, and certify in writing that these actions have been completed within 30 (thirty) days of the termination of this Appendix or the Management Services

Agreement or within 7 (seven) days at the request of School, whichever shall come first.

7. Survival

PMG's obligation under Clauses 2, 3, 4, 5, and 6 shall survive expiration and/or termination of this Appendix and the Management Services Agreement.

Appendix A4.2 – EMO/CMO Facility Buyout Agreement

Pathways In Education – North Carolina

Not applicable. Pathways In Education-North Carolina will not be utilizing a previously held property for its facilities.

Appendix A4.3 – EMO/CMO Financial
History
(3 months Bank Statements and Financial
Statement for 3 years)

Pathways In Education – North Carolina

624 S Grand Ave, Suite 100
 Los Angeles, CA 90017

 Direct inquiries to:
 213 688-8600

ACCOUNT STATEMENT

 Page 1 of 8
 STARTING DATE: April 01, 2020
 ENDING DATE: April 30, 2020
 Total days in statement period: 30
 80-31001624
 (56)

 PATHWAYS MANAGEMENT GROUP, INC.
 320 N HALSTEAD ST SUITE # 280
 PASADENA CA 91107

We're here to continue to provide you with uninterrupted banking services as we navigate the COVID-19 pandemic together. Learn more about the additional support available to our impacted customers and any updates on adjusted branch hours at eastwestbank.com.

Commercial Analysis Checking

Account number	80-31001624	Beginning balance		\$9,303,151.28
Enclosures	56	Total additions	(6)	5,333,126.76
Low balance	\$9,230,705.77	Total subtractions	(72)	1,110,825.66
Average balance	\$10,179,620.50	Ending balance		\$13,525,452.38

CREDITS

Number	Date	Transaction Description	Additions
	04-09	Deposit TLR 3703 BR 8037	1,546,615.13
	04-13	Pre-Auth Credit OneSource Virtua 0000150334 200413 MNY-0006714959	8,308.32
	04-15	Pre-Auth Credit OneSource Virtua 0000150523 200415 MNY-0006724659	2,779.93
	04-27	Pre-Auth Credit OSV REFUND TAX REFUND TAX 200427 CR1347398	45.32
	04-29	Deposit	185,401.35
	04-30	Deposit TLR 3701 BR 8037	3,589,976.71

CHECKS

Number	Date	Amount	Number	Date	Amount
733	04-07	208.29	22666	04-09	752.44
734	04-03	156.21	22667	04-13	800.00
735	04-03	78.11	22668	04-08	60.00
736	04-08	1,645.05	22669	04-08	720.00
737	04-07	1,612.64	22670	04-08	32.50
738	04-09	4,830.88	22672 *	04-14	80.14
739	04-09	4,802.74	22673	04-15	3,547.53
740	04-20	2,779.92	22674	04-13	89.05
2268 *	04-14	8,487.27	22675	04-13	1,752.62
2671 *	04-14	51.18	22677 *	04-14	6,594.20
22655 *	04-01	168.90	22678	04-20	2,995.00
22658 *	04-09	6,682.71	22679	04-10	298.93
22660 *	04-15	86.97	22680	04-13	113.33
22663 *	04-02	74.02	22681	04-10	4,369.31
22665 *	04-09	6,810.96	22682	04-15	23,700.49

PATHWAYS MANAGEMENT GROUP, INC.

Number	Date	Amount	Number	Date	Amount
22683	04-14	173.62	22699	04-29	2,512.52
22684	04-17	50.70	22701 *	04-28	100.00
22685	04-20	159.48	22705 *	04-27	26,801.25
22686	04-13	453.63	22706	04-27	91.07
22687	04-15	876.70	22707	04-28	10,593.58
22688	04-15	1,500.00	22709 *	04-29	837.32
22690 *	04-15	2,148.20	22710	04-30	8.61
22691	04-14	474.54	22711	04-30	458.51
22692	04-13	286.53	22712	04-30	1,742.31
22693	04-14	577.05	22714 *	04-27	5,859.12
22694	04-23	730,767.11	22715	04-27	131.27
22695	04-27	4,735.50	22716	04-27	254.62
22697 *	04-22	4,696.58			
22698	04-30	32.34			

* Skip in check sequence

DEBITS

Date	Transaction Description	Subtractions
04-01	Preauth Debit OSVPayroll 0000148651 200401 MNY-0006656653	41,641.47
04-02	Preauth Debit OSV TAX COL TAX COL 200402 CC 1330891	57.19
04-02	Preauth Debit OSV TAX COL TAX COL 200402 CC 1330890	25,991.13
04-09	Preauth Debit OSVPayroll 0000149860 200409 MNY-0006693116	16,742.57
04-10	Preauth Debit OSVPayroll 0000150047 200410 MNY-0006698086	8,141.01
04-10	Preauth Debit OSVPayroll 0000150007 200410 MNY-0006697943	10,676.52
04-10	Preauth Debit OSV TAX COL TAX COL 200410 CC 1336410	10,749.87
04-13	Preauth Debit OSV TAX COL TAX COL 200413 CC 1336673	13,369.42
04-14	Preauth Debit GREAT-WEST TRUST PAYMENTS 200414 706546291693	6,258.42
04-15	Preauth Debit OSVPayroll 0000150557 200415 MNY-0006729865	31,219.68
04-16	Preauth Debit OSV TAX COL TAX COL 200416 CC 1340570	13,922.33
04-21	Preauth Debit OSV TAX COL TAX COL 200421 CC 1344431	0.02
04-23	Preauth Debit OSVPayroll 0000151709 200423 MNY-0006775127	292.24
04-27	Preauth Debit GREAT-WEST TRUST PAYMENTS 200427 702579080625	5,177.36
04-29	Preauth Debit OSVPayroll 0000152372 200429 MNY-0006802290	31,812.80
04-30	Preauth Debit OSV TAX COL TAX COL 200430 CC 1547925	14,070.08

DAILY BALANCES

Date	Amount	Date	Amount	Date	Amount
03-31	9,303,151.28	04-10	10,702,462.96	04-21	10,591,003.19
04-01	9,261,340.91	04-13	10,693,906.70	04-22	10,586,306.61
04-02	9,235,218.57	04-14	10,671,210.28	04-23	9,855,247.26
04-03	9,234,984.25	04-15	10,610,910.64	04-27	9,812,242.39
04-07	9,233,163.32	04-16	10,596,988.31	04-28	9,801,548.81
04-08	9,230,705.77	04-17	10,596,937.61	04-29	9,951,787.52
04-09	10,736,698.60	04-20	10,591,003.21	04-30	13,525,452.38

624 S Grand Ave, Suite 100
Los Angeles, CA 90017

PATHWAYS MANAGEMENT GROUP, INC.

STARTING DATE: April 01, 2020

ENDING DATE: April 30, 2020

80-31001624

OVERDRAFT/RETURN ITEM FEES

	Total for this period	Total year-to-date
Total Overdraft Fees	\$0.00	\$0.00
Total Returned Item Fees	\$0.00	\$0.00

THE FACE OF THIS INSTRUMENT HAS A COLOURED BACKGROUND ON WHITE PAPER. THE BACK OF THIS INSTRUMENT CONTAINS AN ARTIFICIAL WATERMARK - HOLD AT AN ANGLE TO VIEW -

Pathways Management Group, Inc. DATE 09/25/2020 000733
 320 N Halstead St. Pasadena, CA 91107 16-70380220

\$ ***208.29 US Dollar

Two Hundred Eight and 29/100

PAY TO THE ORDER OF Noah Schulte
 2933 Crape Myrtle Cir
 Chino Hills, CA 91709

EAST WEST BANK
 624 SOUTH GRAND AVENUE, SUITE 100
 LOS ANGELES, CA 90017

Cynthia Hansen
 PATHWAYS MANAGEMENT GROUP

⑆000733⑆ ⑆32207038⑆ ⑆8031001624⑆

04/07/2020 733 \$208.29

THE FACE OF THIS INSTRUMENT HAS A COLOURED BACKGROUND ON WHITE PAPER. THE BACK OF THIS INSTRUMENT CONTAINS AN ARTIFICIAL WATERMARK - HOLD AT AN ANGLE TO VIEW -

Pathways Management Group, Inc. DATE 04/03/2020 000739
 320 N Halstead St. Pasadena, CA 91107 16-70380220

\$ ***4,802.74 US Dollar

Four Thousand Eight Hundred Two and 74/100

PAY TO THE ORDER OF Tony Almaraz
 1745 Fairridge Circle
 West Covina, CA 91792

EAST WEST BANK
 624 SOUTH GRAND AVENUE, SUITE 100
 LOS ANGELES, CA 90017

Cynthia Hansen
 PATHWAYS MANAGEMENT GROUP

⑆000739⑆ ⑆32207038⑆ ⑆8031001624⑆

04/09/2020 739 \$4,802.74

THE FACE OF THIS INSTRUMENT HAS A COLOURED BACKGROUND ON WHITE PAPER. THE BACK OF THIS INSTRUMENT CONTAINS AN ARTIFICIAL WATERMARK - HOLD AT AN ANGLE TO VIEW -

Pathways Management Group, Inc. DATE 03/10/2020 000734
 320 N Halstead St. Pasadena, CA 91107 16-70380220

\$ ***156.21 US Dollar

One Hundred Fifty Six and 21/100

PAY TO THE ORDER OF Adriel Medina Ramirez
 2030 South Bonview
 Apt. E
 Ontario, CA 91761

EAST WEST BANK
 624 SOUTH GRAND AVENUE, SUITE 100
 LOS ANGELES, CA 90017

Cynthia Hansen
 PATHWAYS MANAGEMENT GROUP

⑆000734⑆ ⑆32207038⑆ ⑆8031001624⑆

04/03/2020 734 \$156.21

THE FACE OF THIS INSTRUMENT HAS A COLOURED BACKGROUND ON WHITE PAPER. THE BACK OF THIS INSTRUMENT CONTAINS AN ARTIFICIAL WATERMARK - HOLD AT AN ANGLE TO VIEW -

Pathways Management Group, Inc. DATE 04/17/2020 000740
 320 N Halstead St. Pasadena, CA 91107 16-70380220

\$ ***2,779.92 US Dollar

Two Thousand Seven Hundred Seventy Nine and 92/100

PAY TO THE ORDER OF Socrates Gary
 837 Hyperion Avenue
 Los Angeles, CA 90029

EAST WEST BANK
 624 SOUTH GRAND AVENUE, SUITE 100
 LOS ANGELES, CA 90017

Cynthia Hansen
 PATHWAYS MANAGEMENT GROUP

⑆000740⑆ ⑆32207038⑆ ⑆8031001624⑆

04/20/2020 740 \$2,779.92

THE FACE OF THIS INSTRUMENT HAS A COLOURED BACKGROUND ON WHITE PAPER. THE BACK OF THIS INSTRUMENT CONTAINS AN ARTIFICIAL WATERMARK - HOLD AT AN ANGLE TO VIEW -

Pathways Management Group, Inc. DATE 03/10/2020 000735
 320 N Halstead St. Pasadena, CA 91107 16-70380220

\$ ***78.11 US Dollar

Seventy Eight and 11/100

PAY TO THE ORDER OF Mahogany Session
 2475 North Pennsylvania
 San Bernardino, CA 92407

EAST WEST BANK
 624 SOUTH GRAND AVENUE, SUITE 100
 LOS ANGELES, CA 90017

Cynthia Hansen
 PATHWAYS MANAGEMENT GROUP

⑆000735⑆ ⑆32207038⑆ ⑆8031001624⑆

04/03/2020 735 \$78.11

THIS CHECK HAS A COLOURED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc. East West Bank 22689
 320 N Halstead St. Pasadena, CA 91107 624 South Grand Avenue Suite 100 Los Angeles, CA 90017 16-70380220

04/06/2020 Valid after 180 days \$*****8,487.27

****Eight Thousand Four Hundred Eighty Seven and 27/100

PAY TO THE ORDER OF Verizon Wireless
 P.O. Box 660108
 Dallas, TX 75268-0108

James J. Danaher
 AUTHORIZED SIGNATURE
Cynthia Hansen
 AUTHORIZED SIGNATURE

⑆022689⑆ ⑆32207038⑆ ⑆8031001624⑆

04/14/2020 2268 \$8,487.27

THE FACE OF THIS INSTRUMENT HAS A COLOURED BACKGROUND ON WHITE PAPER. THE BACK OF THIS INSTRUMENT CONTAINS AN ARTIFICIAL WATERMARK - HOLD AT AN ANGLE TO VIEW -

Pathways Management Group, Inc. DATE 04/03/2020 000736
 320 N Halstead St. Pasadena, CA 91107 16-70380220

\$ ***1,645.05 US Dollar

One Thousand Six Hundred Forty Five and 5/100

PAY TO THE ORDER OF Elizabeth Villareal
 347 Camino de Teodoro
 Walnut, CA 91789

EAST WEST BANK
 624 SOUTH GRAND AVENUE, SUITE 100
 LOS ANGELES, CA 90017

Cynthia Hansen
 PATHWAYS MANAGEMENT GROUP

⑆000736⑆ ⑆32207038⑆ ⑆8031001624⑆

04/08/2020 736 \$1,645.05

THIS CHECK HAS A COLOURED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc. East West Bank 22671
 320 N Halstead St. Pasadena, CA 91107 624 South Grand Avenue Suite 100 Los Angeles, CA 90017 16-70380220

04/06/2020 Valid after 180 days \$*****51.18

****Fifty One and 18/100

PAY TO THE ORDER OF AT&T
 PO Box 5025
 Carol Stream, IL 60197-5025

James J. Danaher
 AUTHORIZED SIGNATURE
Cynthia Hansen
 AUTHORIZED SIGNATURE

⑆022671⑆ ⑆32207038⑆ ⑆8031001624⑆

04/14/2020 2671 \$51.18

THE FACE OF THIS INSTRUMENT HAS A COLOURED BACKGROUND ON WHITE PAPER. THE BACK OF THIS INSTRUMENT CONTAINS AN ARTIFICIAL WATERMARK - HOLD AT AN ANGLE TO VIEW -

Pathways Management Group, Inc. DATE 04/03/2020 000737
 320 N Halstead St. Pasadena, CA 91107 16-70380220

\$ ***1,612.64 US Dollar

One Thousand Six Hundred Twelve and 64/100

PAY TO THE ORDER OF Tony Almaraz
 1745 Fairridge Circle
 West Covina, CA 91792

EAST WEST BANK
 624 SOUTH GRAND AVENUE, SUITE 100
 LOS ANGELES, CA 90017

Cynthia Hansen
 PATHWAYS MANAGEMENT GROUP

⑆000737⑆ ⑆32207038⑆ ⑆8031001624⑆

04/07/2020 737 \$1,612.64

THIS CHECK HAS A COLOURED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc. East West Bank 22655
 320 N Halstead St. Pasadena, CA 91107 624 South Grand Avenue Suite 100 Los Angeles, CA 90017 16-70380220

03/16/2020 Valid after 180 days \$*****168.90

****One Hundred Sixty Eight and 90/100

PAY TO THE ORDER OF Verizon Wireless
 P.O. Box 660108
 Dallas, TX 75268-0108

James J. Danaher
 AUTHORIZED SIGNATURE
Cynthia Hansen
 AUTHORIZED SIGNATURE

⑆022655⑆ ⑆32207038⑆ ⑆8031001624⑆

04/01/2020 22655 \$168.90

THE FACE OF THIS INSTRUMENT HAS A COLOURED BACKGROUND ON WHITE PAPER. THE BACK OF THIS INSTRUMENT CONTAINS AN ARTIFICIAL WATERMARK - HOLD AT AN ANGLE TO VIEW -

Pathways Management Group, Inc. DATE 04/03/2020 000738
 320 N Halstead St. Pasadena, CA 91107 16-70380220

\$ ***4,830.88 US Dollar

Four Thousand Eight Hundred Thirty and 88/100

PAY TO THE ORDER OF Elizabeth Villareal
 347 Camino de Teodoro
 Walnut, CA 91789

EAST WEST BANK
 624 SOUTH GRAND AVENUE, SUITE 100
 LOS ANGELES, CA 90017

Cynthia Hansen
 PATHWAYS MANAGEMENT GROUP

⑆000738⑆ ⑆32207038⑆ ⑆8031001624⑆

04/09/2020 738 \$4,830.88

THIS CHECK HAS A COLOURED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc. East West Bank 22658
 320 N Halstead St. Pasadena, CA 91107 624 South Grand Avenue Suite 100 Los Angeles, CA 90017 16-70380220

03/23/2020 Valid after 180 days \$*****6,682.71

****Six Thousand Six Hundred Eighty Two and 71/100

PAY TO THE ORDER OF American Express (TX)
 PO BOX 650448
 Dallas, TX 75268-0448

James J. Danaher
 AUTHORIZED SIGNATURE
Cynthia Hansen
 AUTHORIZED SIGNATURE

⑆022658⑆ ⑆32207038⑆ ⑆8031001624⑆

04/09/2020 22658 \$6,682.71

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22660
16-70383220

03/23/2020 Void after 180 days
\$*****66.97

****Eighty Six and 97/100

PAY TO THE ORDER OF Franchise Tax Board
P.O. Box 942867
Sacramento, CA 94267-0008

Jamie L. Doster
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2660⑆ 3 2 20 7038 1680 3 100 16 24⑆

04/15/2020 22660 \$86.97

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22669
16-70383220

04/06/2020 Void after 180 days
\$*****720.00

****Seven Hundred Twenty and 00/100

PAY TO THE ORDER OF Education Dynamics Inc.
320 N Halstead St
Pasadena, CA 91107

Jamie L. Doster
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2669⑆ 3 2 20 7038 1680 3 100 16 24⑆

04/08/2020 22669 \$720.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22663
16-70383220

03/23/2020 Void after 180 days
\$*****74.02

****Seventy Four and 02/100

PAY TO THE ORDER OF W. Health Advocate Sol Inc.
PO BOX 581509
Denver, CO 80256-1509

Jamie L. Doster
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2663⑆ 3 2 20 7038 1680 3 100 16 24⑆

04/02/2020 22663 \$74.02

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22670
16-70383220

04/06/2020 Void after 180 days
\$*****32.50

****Thirty Two and 50/100

PAY TO THE ORDER OF Lupine Properties LLC
320 N Halstead St
Pasadena, CA 91107

Jamie L. Doster
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2670⑆ 3 2 20 7038 1680 3 100 16 24⑆

04/08/2020 22670 \$32.50

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22665
16-70383220

03/26/2020 Void after 180 days
\$*****6,810.96

****Six Thousand Eight Hundred Ten and 96/100

PAY TO THE ORDER OF Eagle Eye Holding Company
320 N Halstead
Suite 200
Pasadena, CA 91107

Jamie L. Doster
AUTHORIZED SIGNATURE

Cynthia Hansen
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2665⑆ 3 2 20 7038 1680 3 100 16 24⑆

04/09/2020 22665 \$6,810.96

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22672
16-70383220

04/06/2020 Void after 180 days
\$*****80.14

****Eighty and 14/100

PAY TO THE ORDER OF AT&T
PO Box 5025
Carol Stream, IL 60197-5025

Jamie L. Doster
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2672⑆ 3 2 20 7038 1680 3 100 16 24⑆

04/14/2020 22672 \$80.14

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22666
16-70383220

03/26/2020 Void after 180 days
\$*****752.44

****Seven Hundred Fifty Two and 44/100

PAY TO THE ORDER OF Hawkeye Properties Inc
320 N Halstead Street
Suite 200
Pasadena, CA 91107

Jamie L. Doster
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2666⑆ 3 2 20 7038 1680 3 100 16 24⑆

04/09/2020 22666 \$752.44

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22673
16-70383220

04/06/2020 Void after 180 days
\$*****3,547.53

****Three Thousand Five Hundred Forty Seven and 53/100

PAY TO THE ORDER OF Blank Rome LLP
Attn: Cash Receipts One Logal Square
130 North 18th Street
Philadelphia, PA 19103-6998

Jamie L. Doster
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2673⑆ 3 2 20 7038 1680 3 100 16 24⑆

04/15/2020 22673 \$3,547.53

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22667
16-70383220

03/26/2020 Void after 180 days
\$*****800.00

****Eight Hundred and 00/100

PAY TO THE ORDER OF Madeline Mueller
Pasadena - Healing Center
3383 Padaro Lane
Carpenteria, CA 93013

Jamie L. Doster
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2667⑆ 3 2 20 7038 1680 3 100 16 24⑆

04/13/2020 22667 \$800.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22674
16-70383220

04/06/2020 Void after 180 days
\$*****89.05

****Eighty Nine and 05/100

PAY TO THE ORDER OF FedEx
P.O. Box 7221
Pasadena, CA 91109-7321

Jamie L. Doster
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2674⑆ 3 2 20 7038 1680 3 100 16 24⑆

04/13/2020 22674 \$89.05

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22668
16-70383220

04/06/2020 Void after 180 days
\$*****60.00

****Sixty and 00/100

PAY TO THE ORDER OF Alltech Enterprises LLC
320 N Halstead St
Pasadena, CA 91107

Jamie L. Doster
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2668⑆ 3 2 20 7038 1680 3 100 16 24⑆

04/08/2020 22668 \$60.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22675
16-70383220

04/06/2020 Void after 180 days
\$*****1,752.62

****One Thousand Seven Hundred Fifty Two and 62/100

PAY TO THE ORDER OF FedEx
P.O. Box 7221
Pasadena, CA 91109-7321

Jamie L. Doster
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2675⑆ 3 2 20 7038 1680 3 100 16 24⑆

04/13/2020 22675 \$1,752.62

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22677
16-70383220

04/06/2020 Void after 180 days
\$*****6,594.20

****Six Thousand Five Hundred Ninety Four and 20/100

PAY TO THE ORDER OF Guardian - Appleton
P.O. Box 677458
Dallas, TX 75267-7458

James D. Dasher
AUTHORIZED SIGNATURE

22677
16-70383220

04/14/2020 22677 \$6,594.20

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22683
16-70383220

04/06/2020 Void after 180 days
\$*****173.62

****One Hundred Seventy Three and 62/100

PAY TO THE ORDER OF Pinney Bowes Purchase Power
P.O. Box 371874
Pittsburgh, PA 15250-7874

James D. Dasher
AUTHORIZED SIGNATURE

22683
16-70383220

04/14/2020 22683 \$173.62

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

IEC US Holdings, Inc.

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22678
16-70383220

04/06/2020 Void after 180 days
\$*****2,995.00

****Two Thousand Nine Hundred Ninety Five and 00/100

PAY TO THE ORDER OF IEC US Holdings, Inc.
18485 Laguna Canyon Rd., Suite 300
Irvine, CA 92618

James D. Dasher
AUTHORIZED SIGNATURE

22678
16-70383220

04/20/2020 22678 \$2,995.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22684
16-70383220

04/06/2020 Void after 180 days
\$*****50.70

****Fifty and 70/100

PAY TO THE ORDER OF ReadyRefresh By Nestle
A Division of Nestle Waters North America, Inc.
P.O. Box 855158
Louisville, KY 40285-6158

James D. Dasher
AUTHORIZED SIGNATURE

22684
16-70383220

04/17/2020 22684 \$50.70

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22679
16-70383220

04/06/2020 Void after 180 days
\$*****298.93

****Two Hundred Ninety Eight and 93/100

PAY TO THE ORDER OF Iron Mountain
P.O. Box 601002
Pasadena, CA 91189-1002

James D. Dasher
AUTHORIZED SIGNATURE

22679
16-70383220

04/10/2020 22679 \$298.93

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22685
16-70383220

04/06/2020 Void after 180 days
\$*****159.48

****One Hundred Fifty Nine and 48/100

PAY TO THE ORDER OF ReadyRefresh By Nestle
A Division of Nestle Waters North America, Inc.
P.O. Box 855158
Louisville, KY 40285-6158

James D. Dasher
AUTHORIZED SIGNATURE

22685
16-70383220

04/20/2020 22685 \$159.48

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22680
16-70383220

04/06/2020 Void after 180 days
\$*****113.33

****One Hundred Thirteen and 33/100

PAY TO THE ORDER OF MR. Copy, Inc.
dba MRC Smart Technology Solutions
PO BOX 843760
Los Angeles, CA 90084-3760

James D. Dasher
AUTHORIZED SIGNATURE

22680
16-70383220

04/13/2020 22680 \$113.33

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22686
16-70383220

04/06/2020 Void after 180 days
\$*****453.63

****Four Hundred Fifty Three and 63/100

PAY TO THE ORDER OF Ricoh USA, Inc.
P.O. Box 31001-0850
Pasadena, CA 91110-0850

James D. Dasher
AUTHORIZED SIGNATURE

22686
16-70383220

04/13/2020 22686 \$453.63

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22681
16-70383220

04/06/2020 Void after 180 days
\$*****4,369.31

****Four Thousand Three Hundred Sixty Nine and 31/100

PAY TO THE ORDER OF NFP Property & Casualty Services, Inc.
NFP P & C West
PO BOX 840603
Los Angeles, CA 90084-0603

James D. Dasher
AUTHORIZED SIGNATURE

22681
16-70383220

04/10/2020 22681 \$4,369.31

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22687
16-70383220

04/06/2020 Void after 180 days
\$*****876.70

****Eight Hundred Seventy Six and 70/100

PAY TO THE ORDER OF Staples Advantage
Staples Business Advantage
PO Box 660409
Dallas, TX 75266

James D. Dasher
AUTHORIZED SIGNATURE

22687
16-70383220

04/15/2020 22687 \$876.70

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22682
16-70383220

04/06/2020 Void after 180 days
\$*****23,700.49

****Twenty Three Thousand Seven Hundred and 49/100

PAY TO THE ORDER OF OneSource Virtual HR, Inc
Dept 3020
PO BOX 123020
Dallas, TX 75312-3020

James D. Dasher
AUTHORIZED SIGNATURE

22682
16-70383220

04/15/2020 22682 \$23,700.49

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22688
16-70383220

04/06/2020 Void after 180 days
\$*****1,500.00

****One Thousand Five Hundred and 00/100

PAY TO THE ORDER OF The Ryding Company
2659 Townsgate Road
Suite 101
Westlake Village, CA 91361

James D. Dasher
AUTHORIZED SIGNATURE

22688
16-70383220

04/15/2020 22688 \$1,500.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22690
16-70383220

04/06/2020

Void after 180 days
\$*****2,148.20

****Two Thousand One Hundred Forty Eight and 20/100

Jamie T. Dauster
AUTHORIZED SIGNATURE

PAY TO THE ORDER OF Xerox Financial Services
P.O. Box 202882
Dallas, TX 75320-2882

AUTHORIZED SIGNATURE

⑆0 2 2690⑆⑆⑆ 3 2 207038 1⑆80 3 100 16 24⑆⑆

04/15/2020 22690 \$2,148.20

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22697
16-70383220

04/20/2020

Void after 180 days
\$*****4,696.58

****Four Thousand Six Hundred Ninety Six and 58/100

Jamie T. Dauster
AUTHORIZED SIGNATURE

PAY TO THE ORDER OF Education Management Systems, Inc.
320 N. Halstead St.
Suite 220
Pasadena, CA 91107

AUTHORIZED SIGNATURE

⑆0 2 2697⑆⑆⑆ 3 2 207038 1⑆80 3 100 16 24⑆⑆

04/22/2020 22697 \$4,696.58

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22691
16-70383220

04/06/2020

Void after 180 days
\$*****474.54

****Four Hundred Seventy Four and 54/100

Jamie T. Dauster
AUTHORIZED SIGNATURE

PAY TO THE ORDER OF Elizabeth Villarreal
347 Camino de Teodoro
Walnut, CA 91799

AUTHORIZED SIGNATURE

⑆0 2 2691⑆⑆⑆ 3 2 207038 1⑆80 3 100 16 24⑆⑆

04/14/2020 22691 \$474.54

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22698
16-70383220

04/20/2020

Void after 180 days
\$*****32.34

****Thirty Two and 34/100

Jamie T. Dauster
AUTHORIZED SIGNATURE

PAY TO THE ORDER OF Franchise Tax Board
P.O. Box 942887
Sacramento, CA 94267-0088

AUTHORIZED SIGNATURE

⑆0 2 2698⑆⑆⑆ 3 2 207038 1⑆80 3 100 16 24⑆⑆

04/30/2020 22698 \$32.34

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22692
16-70383220

04/06/2020

Void after 180 days
\$*****286.53

****Two Hundred Eighty Six and 53/100

Jamie T. Dauster
AUTHORIZED SIGNATURE

PAY TO THE ORDER OF Marissa Underwood
711 Mound Ave
Apt A
South Pasadena, CA 91030

AUTHORIZED SIGNATURE

⑆0 2 2692⑆⑆⑆ 3 2 207038 1⑆80 3 100 16 24⑆⑆

04/13/2020 22692 \$286.53

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22699
16-70383220

04/20/2020

Void after 180 days
\$*****2,512.52

****Two Thousand Five Hundred Twelve and 52/100

Jamie T. Dauster
AUTHORIZED SIGNATURE

PAY TO THE ORDER OF Guardian - Appleton
P.O. Box 677458
Dallas, TX 75267-7458

AUTHORIZED SIGNATURE

⑆0 2 2699⑆⑆⑆ 3 2 207038 1⑆80 3 100 16 24⑆⑆

04/29/2020 22699 \$2,512.52

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22693
16-70383220

04/06/2020

Void after 180 days
\$*****577.05

****Five Hundred Seventy Seven and 05/100

Jamie T. Dauster
AUTHORIZED SIGNATURE

PAY TO THE ORDER OF Tony Alfanador
1745 Fairridge Circle
West Covina, CA 91792

AUTHORIZED SIGNATURE

⑆0 2 2693⑆⑆⑆ 3 2 207038 1⑆80 3 100 16 24⑆⑆

04/14/2020 22693 \$577.05

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22701
16-70383220

04/20/2020

Void after 180 days
\$*****100.00

****One Hundred and 00/100

Jamie T. Dauster
AUTHORIZED SIGNATURE

PAY TO THE ORDER OF IGOE
Administrative Services
P.O. Box 501480
San Diego, CA 92150-1480

AUTHORIZED SIGNATURE

⑆0 2 2701⑆⑆⑆ 3 2 207038 1⑆80 3 100 16 24⑆⑆

04/28/2020 22701 \$100.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22694
16-70383220

04/20/2020

Void after 180 days
\$*****730,767.11

****Seven Hundred Thirty Thousand Seven Hundred Sixty Seven and 11/100

Jamie T. Dauster
AUTHORIZED SIGNATURE

PAY TO THE ORDER OF 9 Det Education Solutions, LLC
320 N. Halstead St.
Pasadena, CA 91107-3141

AUTHORIZED SIGNATURE

⑆0 2 2694⑆⑆⑆ 3 2 207038 1⑆80 3 100 16 24⑆⑆

04/23/2020 22694 \$730,767.11

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22705
16-70383220

04/20/2020

Void after 180 days
\$*****26,801.25

****Twenty Six Thousand Eight Hundred One and 25/100

Jamie T. Dauster
AUTHORIZED SIGNATURE

PAY TO THE ORDER OF Maginnis Knechtel & McIntyre
300 West Colorado Blvd
Pasadena, CA 91105-1824

AUTHORIZED SIGNATURE

⑆0 2 2705⑆⑆⑆ 3 2 207038 1⑆80 3 100 16 24⑆⑆

04/27/2020 22705 \$26,801.25

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22695
16-70383220

04/20/2020

Void after 180 days
\$*****4,735.50

****Four Thousand Seven Hundred Thirty Five and 50/100

Jamie T. Dauster
AUTHORIZED SIGNATURE

PAY TO THE ORDER OF Adams and Reese LLP
Dept 5208
P.O. Box 2153
Birmingham AL 35287 5208

AUTHORIZED SIGNATURE

⑆0 2 2695⑆⑆⑆ 3 2 207038 1⑆80 3 100 16 24⑆⑆

04/27/2020 22695 \$4,735.50

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22706
16-70383220

04/20/2020

Void after 180 days
\$*****91.07

****Ninety One and 07/100

Jamie T. Dauster
AUTHORIZED SIGNATURE

PAY TO THE ORDER OF Michelle Won
c/ba Law offices of Michelle Won
P.O. Box 4254
Glendale, CA 91222

AUTHORIZED SIGNATURE

⑆0 2 2706⑆⑆⑆ 3 2 207038 1⑆80 3 100 16 24⑆⑆

04/27/2020 22706 \$91.07

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22707
16-70383220

04/20/2020 Void after 180 days
\$*****10,593.58

*****Ten Thousand Five Hundred Ninety Three and 58/100

PAY TO THE ORDER OF OneSource Virtual HR, Inc.
Dept 3020
PO BOX 123020
Dallas, TX 75312-3020

Jamie L. Dineen
AUTHORIZED SIGNATURE

Cynthia Hansen
AUTHORIZED SIGNATURE

⑆0 2 2 7 0 9 ⑆ 3 2 2 0 7 0 3 8 ⑆ 1 ⑆ 8 0 3 1 0 0 ⑆ 6 2 4 ⑆

04/28/2020 22707 \$10,593.58

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22715
16-70383220

04/20/2020 Void after 180 days
\$*****131.27

*****One Hundred Thirty One and 27/100

PAY TO THE ORDER OF LaVita Golden
44008 Ruffcorn Avenue
Lancaster, CA 93536

Jamie L. Dineen
AUTHORIZED SIGNATURE

Cynthia Hansen
AUTHORIZED SIGNATURE

⑆0 2 2 7 1 5 ⑆ 3 2 2 0 7 0 3 8 ⑆ 1 ⑆ 8 0 3 1 0 0 ⑆ 6 2 4 ⑆

04/27/2020 22715 \$131.27

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22709
16-70383220

04/20/2020 Void after 180 days
\$*****837.32

*****Eight Hundred Thirty Seven and 32/100

PAY TO THE ORDER OF Ptnicy Bowes Global Financial Services,
P.O. Box 371887
Pittsburgh, PA 15250-7887

Jamie L. Dineen
AUTHORIZED SIGNATURE

Cynthia Hansen
AUTHORIZED SIGNATURE

⑆0 2 2 7 0 9 ⑆ 3 2 2 0 7 0 3 8 ⑆ 1 ⑆ 8 0 3 1 0 0 ⑆ 6 2 4 ⑆

04/29/2020 22709 \$837.32

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22716
16-70383220

04/20/2020 Void after 180 days
\$*****254.62

*****Two Hundred Fifty Four and 62/100

PAY TO THE ORDER OF Marissa Underwood
711 Mound Ave
Apt A
South Pasadena, CA 91030

Jamie L. Dineen
AUTHORIZED SIGNATURE

Cynthia Hansen
AUTHORIZED SIGNATURE

⑆0 2 2 7 1 5 ⑆ 3 2 2 0 7 0 3 8 ⑆ 1 ⑆ 8 0 3 1 0 0 ⑆ 6 2 4 ⑆

04/27/2020 22716 \$254.62

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22710
16-70383220

04/20/2020 Void after 180 days
\$*****8.61

*****Eight and 61/100

PAY TO THE ORDER OF ReadyRefresh By Nestle
a Division of Nestle Waters North America Inc.
P.O. Box 855158
Louisville, KY 40285-6158

Jamie L. Dineen
AUTHORIZED SIGNATURE

Cynthia Hansen
AUTHORIZED SIGNATURE

⑆0 2 2 7 1 0 ⑆ 3 2 2 0 7 0 3 8 ⑆ 1 ⑆ 8 0 3 1 0 0 ⑆ 6 2 4 ⑆

04/30/2020 22710 \$8.61

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22711
16-70383220

04/20/2020 Void after 180 days
\$*****458.51

*****Four Hundred Fifty Eight and 51/100

PAY TO THE ORDER OF The Hertz Corporation
Commercial Billing Dept 1124
P.O. Box 121128
Dallas, TX 75312-1124

Jamie L. Dineen
AUTHORIZED SIGNATURE

Cynthia Hansen
AUTHORIZED SIGNATURE

⑆0 2 2 7 1 ⑆ 3 2 2 0 7 0 3 8 ⑆ 1 ⑆ 8 0 3 1 0 0 ⑆ 6 2 4 ⑆

04/30/2020 22711 \$458.51

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22712
16-70383220

04/20/2020 Void after 180 days
\$*****1,742.31

*****One Thousand Seven Hundred Forty Two and 31/100

PAY TO THE ORDER OF Xerox Financial Services
P.O. Box 202882
Dallas, TX 75320-2882

Jamie L. Dineen
AUTHORIZED SIGNATURE

Cynthia Hansen
AUTHORIZED SIGNATURE

⑆0 2 2 7 1 2 ⑆ 3 2 2 0 7 0 3 8 ⑆ 1 ⑆ 8 0 3 1 0 0 ⑆ 6 2 4 ⑆

04/30/2020 22712 \$1,742.31

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22714
16-70383220

04/20/2020 Void after 180 days
\$*****5,859.12

*****Five Thousand Eight Hundred Fifty Nine and 12/100

PAY TO THE ORDER OF Heather Clark
14547 Tanglewood Ct.
Hesperia, CA 92345

Jamie L. Dineen
AUTHORIZED SIGNATURE

Cynthia Hansen
AUTHORIZED SIGNATURE

⑆0 2 2 7 1 4 ⑆ 3 2 2 0 7 0 3 8 ⑆ 1 ⑆ 8 0 3 1 0 0 ⑆ 6 2 4 ⑆

04/27/2020 22714 \$5,859.12

STATEMENT BALANCING

Fill in the amounts below from the front of this statement and your checkbook.

ENTER

Ending Balance of this Statement..... \$ _____

ENTER

Present Balance in your checkbook..... \$ _____

Add Deposits not shown on this Statement \$ _____

Subtract any service charges, finance or any other charges..... \$ _____

Sub Total..... \$ _____

Sub Total \$ _____

Subtract Checks Issued but not on Statement

CHECK NUMBER OR DATE	AMOUNT	CHECK NUMBER OR DATE	AMOUNT
TOTAL		TOTAL	

Add Monthly Interest Earned \$ _____

Add any deposits not yet entered in checkbook (Reverse Advances)..... \$ _____

Subtract any checks not yet entered in checkbook (Reverse Payments)..... \$ _____

Total amount of outstanding checks..... \$ _____

Balance.....** \$ _____

Balance..... \$ _____

IN CASE OF ERRORS OR QUESTIONS REGARDING YOUR CHECKING ACCOUNT

You must examine your statement carefully and promptly. You are in the best position to discover errors and unauthorized transactions on your account. If you fail to notify us in writing of suspected problems or unauthorized transactions within the time periods as specified in the Deposit Agreement (which periods are no more than 60 days after we make the statement available to you and in some cases 30 days or less), we are not liable to you for, and you agree not to make a claim against us for problems or unauthorized transactions.

IN CASE OF ERRORS OR QUESTIONS ABOUT YOUR ELECTRONIC FUNDS TRANSFERS

Telephone or write your local branch of account, listed on the statement front, as soon as you can if you think your statement or receipt is wrong or if you need more information about a transfer on the statement or receipt. We must hear from you no later than 60 days after we send you the FIRST statement on which the error or problem appeared.

1. Tell us your name and account number.
2. Describe the error or the transfer you are unsure about and explain as clearly as you can why you believe there is an error or why you need more information.
3. Tell us the dollar amount of the suspected error.

We will investigate your complaint and will correct any error promptly. If our investigation takes longer than 10 business days from the date we received your notification, we will provisionally credit your account for the disputed amount until our investigation has been completed. If the disputed amount involves an electronic funds transfer to or from an account within 30 days after the first deposit to the account was made, we will provisionally credit your account within 20 business days from the date we receive your notification.

ACCOUNTS WITH CHECK STORAGE

Upon your request, we will provide you, without charge, legible copies of two checks from each account statement. Additional copies of canceled checks are subject to our service charges. You can make a request for these copies by contacting the branch listed on the front of this statement.

CHANGE OF ADDRESS

Please notify us immediately for change of address by phoning or writing your local branch of account, listed on the front of this statement.

MEMBER FDIC

624 S Grand Ave, Suite 100
Los Angeles, CA 90017

Direct inquiries to:
213 688-8600

ACCOUNT STATEMENT

Page 1 of 7
STARTING DATE: May 01, 2020
ENDING DATE: May 31, 2020
Total days in statement period: 31
80-31001624
(57)

PATHWAYS MANAGEMENT GROUP, INC.
320 N HALSTEAD ST SUITE # 280
PASADENA CA 91107

We're here to continue to provide you with uninterrupted banking services as we navigate the COVID-19 pandemic together. Learn more about the additional support available to our impacted customers and any updates on adjusted branch hours at eastwestbank.com.

Commercial Analysis Checking

Account number	80-31001624	Beginning balance		\$13,525,452.38
Enclosures	57	Total additions	(3)	968,440.88
Low balance	\$13,357,800.57	Total subtractions	(66)	392,323.47
Average balance	\$13,519,446.48	Ending balance		\$14,101,569.79

CREDITS

Number	Date	Transaction Description	Additions
	05-01	Pre-Auth Credit COUNTY OF SAN BE ACHPAYMENT 200501	6,816.31
	05-14	Credit Memo TLR 3109 BR 8031	69.16
	05-29	Deposit	961,555.41

CHECKS

Number	Date	Amount	Number	Date	Amount
606	05-11	118.96	22722	05-18	476.00
22189 *	05-08	6.00	22723	05-07	8,415.20
22191 *	05-13	6.00	22724	05-15	410.82
22192	05-13	6.00	22725	05-11	80.41
22194 *	05-13	6.00	22726	05-15	787.11
22195	05-13	6.00	22727	05-14	31.96
22196	05-13	6.00	22728	05-11	15.59
22197	05-13	6.00	22729	05-07	17.42
22199 *	05-13	6.00	22730	05-12	168.54
22200	05-13	6.00	22731	05-12	493.30
22661 *	05-08	299.00	22732	05-12	556.42
22696 *	05-29	6,810.96	22733	05-20	12,841.00
22700 *	05-29	752.44	22734	05-29	209,587.79
22703 *	05-06	35.34	22736 *	05-27	109.27
22708 *	05-13	400.00	22737	05-27	86.56
22713 *	05-04	108.85	22738	05-27	48.39
22717 *	05-07	29,324.40	22739	05-27	83.28
22718	05-08	5,561.18	22740	05-26	27.46
22719	05-13	107.34	22743 *	05-28	2,587.50
22720	05-13	29.93	22746 *	05-22	26.62
22721	05-12	652.12	22747	05-22	331.31

PATHWAYS MANAGEMENT GROUP, INC.

Number	Date	Amount	Number	Date	Amount
22748	05-26	107.49	22759	05-22	332.55
22749	05-22	100.00	22760	05-22	1,310.00
22750	05-21	118.83	22761	05-26	559.76
22751	05-27	1,044.80	22762	05-26	217.83
22753 *	05-22	3,325.00	22763	05-29	60.00
22755 *	05-29	425.00	22764	05-26	129.99
22756	05-26	141.12	22765	05-29	150.00
22758 *	05-26	190.00			

* Skip in check sequence

DEBITS

Date	Transaction Description	Subtractions
05-08	Preauth Debit OSVPayroll 0000153436 200508 MNY-0006842818	403.54
05-11	Preauth Debit OSV TAX COL TAX COL 200511 CC 1553091	98.52
05-11	Preauth Debit GREAT-WEST TRUST PAYMENTS 200511 703045257595	4,185.98
05-13	Preauth Debit OSVPayroll 0000153850 200513 MNY-0006864866	32,785.48
05-14	Withdrawal Trns TLR 3109 BR 8031	69.16
05-14	Preauth Debit OSV TAX COL TAX COL 200514 CC 1554194	14,311.76
05-26	Preauth Debit GREAT-WEST TRUST PAYMENTS 200526 700712922525	4,221.47
05-27	Preauth Debit OSVPayroll 0000155692 200527 MNY-0006932625	32,443.56
05-28	Preauth Debit OSV TAX COL TAX COL 200528 CC 1561022	14,155.16

DAILY BALANCES

Date	Amount	Date	Amount	Date	Amount
04-30	13,525,452.38	05-12	13,481,727.92	05-22	13,413,954.21
05-01	13,532,268.69	05-13	13,448,357.17	05-26	13,408,359.09
05-04	13,532,159.84	05-14	13,434,013.45	05-27	13,374,543.23
05-06	13,532,124.50	05-15	13,432,815.52	05-28	13,357,800.57
05-07	13,494,367.48	05-18	13,432,339.52	05-29	14,101,569.79
05-08	13,488,097.76	05-20	13,419,498.52		
05-11	13,483,598.30	05-21	13,419,379.69		

OVERDRAFT/RETURN ITEM FEES

	Total for this period	Total year-to-date
Total Overdraft Fees	\$0.00	\$0.00
Total Returned Item Fees	\$0.00	\$0.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

DATE 11/20/2018

000606

16-7038/3220

S *****118.96 US Dollar

One Hundred Eighteen and 96/100

PAY TO THE ORDER OF Rachelle Calderon
1626 Anneland Ave
Rowland Heights, CA 91748

EAST WEST BANK
624 SOUTH GRAND AVENUE, SUITE 100
LOS ANGELES, CA 90017

05/11/2020 606 \$118.96

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22196
16-7038/3220

D 1568776

09/23/2019

Void after 180 days
\$*****6.00

*****Six and 00/100

PAY TO THE ORDER OF CA Secretary of State
1500 11th St. 3rd Floor
Sacramento, CA 95814

05/13/2020 22196 \$6.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22189
16-7038/3220

D 1568461

09/23/2019

Void after 180 days
\$*****6.00

*****Six and 00/100

PAY TO THE ORDER OF CA Secretary of State
1500 11th St. 3rd Floor
Sacramento, CA 95814

05/08/2020 22189 \$6.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22197
16-7038/3220

D 1568777

09/23/2019

Void after 180 days
\$*****6.00

*****Six and 00/100

PAY TO THE ORDER OF CA Secretary of State
1500 11th St. 3rd Floor
Sacramento, CA 95814

05/13/2020 22197 \$6.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22191
16-7038/3220

D 1568783

09/23/2019

Void after 180 days
\$*****6.00

*****Six and 00/100

PAY TO THE ORDER OF CA Secretary of State
1500 11th St. 3rd Floor
Sacramento, CA 95814

05/13/2020 22191 \$6.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22199
16-7038/3220

D 1568784

09/23/2019

Void after 180 days
\$*****6.00

*****Six and 00/100

PAY TO THE ORDER OF CA Secretary of State
1500 11th St. 3rd Floor
Sacramento, CA 95814

05/13/2020 22199 \$6.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22192
16-7038/3220

D 1568782

09/23/2019

Void after 180 days
\$*****6.00

*****Six and 00/100

PAY TO THE ORDER OF CA Secretary of State
1500 11th St. 3rd Floor
Sacramento, CA 95814

05/13/2020 22192 \$6.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22200
16-7038/3220

D 1568778

09/23/2019

Void after 180 days
\$*****6.00

*****Six and 00/100

PAY TO THE ORDER OF CA Secretary of State
1500 11th St. 3rd Floor
Sacramento, CA 95814

05/13/2020 22200 \$6.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22194
16-7038/3220

D 1568781

09/23/2019

Void after 180 days
\$*****6.00

*****Six and 00/100

PAY TO THE ORDER OF CA Secretary of State
1500 11th St. 3rd Floor
Sacramento, CA 95814

05/13/2020 22194 \$6.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22661
16-7038/3220

*****Two Hundred Ninety Nine and 00/100

PAY TO THE ORDER OF JEVS Human Services
Vocational Reseach Institute
1845 Walnut Street, Suite 660
Philadelphia, PA 19103

05/08/2020 22661 \$299.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22195
16-7038/3220

D 1568849

09/23/2019

Void after 180 days
\$*****6.00

*****Six and 00/100

PAY TO THE ORDER OF CA Secretary of State
1500 11th St. 3rd Floor
Sacramento, CA 95814

05/13/2020 22195 \$6.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22696
16-7038/3220

*****Six Thousand Eight Hundred Ten and 96/100

PAY TO THE ORDER OF Eagle Eye Holding Company
320 N. Halstead
Suite 280
Pasadena, CA 91107

05/29/2020 22696 \$6,810.96

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22700
16-70383220

04/20/2020 Void after 180 days
\$*****752.44

****Seven Hundred Fifty Two and 44/100

PAY TO THE ORDER OF Hawkeye Properties Inc *
320 N. Halstead Street
Suite#280
Pasadena, CA 91107

Jamie D. Dunbar
AUTHORIZED SIGNATURE

16-70383220

⑆0 2 2700⑆⑆⑆ 3 2 20 70 36 1⑆80 3 100 16 24⑆

05/29/2020 22700 \$752.44

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22719
16-70383220

05/04/2020 Void after 180 days
\$*****107.34

****One Hundred Seven and 34/100

PAY TO THE ORDER OF AT&T
PO Box 5025
Carol Stream, IL 60197-5025

Jamie D. Dunbar
AUTHORIZED SIGNATURE

16-70383220

⑆0 2 2719⑆⑆⑆ 3 2 20 70 36 1⑆80 3 100 16 24⑆

05/13/2020 22719 \$107.34

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22703
16-70383220

04/20/2020 Void after 180 days
\$*****35.34

****Thirty Five and 34/100

PAY TO THE ORDER OF Landmark Healthplan of Ca.
P.O. BOX 981809
El Paso, TX 79998

Jamie D. Dunbar
AUTHORIZED SIGNATURE

16-70383220

⑆0 2 2703⑆⑆⑆ 3 2 20 70 36 1⑆80 3 100 16 24⑆

05/06/2020 22703 \$35.34

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22720
16-70383220

05/04/2020 Void after 180 days
\$*****29.93

****Twenty Nine and 93/100

PAY TO THE ORDER OF AT&T Long Distance
P.O. Box 5017
Carol Stream, IL 60197-5017

Jamie D. Dunbar
AUTHORIZED SIGNATURE

16-70383220

⑆0 2 2720⑆⑆⑆ 3 2 20 70 36 1⑆80 3 100 16 24⑆

05/13/2020 22720 \$29.93

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22708
16-70383220

04/20/2020 Void after 180 days
\$*****400.00

****Four Hundred and 00/100

PAY TO THE ORDER OF Personal Strengths Publishing, Inc.
2701 Laker Ave West
Suite 250
Carlsbad, CA 92010

Jamie D. Dunbar
AUTHORIZED SIGNATURE

16-70383220

⑆0 2 2708⑆⑆⑆ 3 2 20 70 36 1⑆80 3 100 16 24⑆

05/13/2020 22708 \$400.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22721
16-70383220

05/04/2020 Void after 180 days
\$*****652.12

****Six Hundred Fifty Two and 12/100

PAY TO THE ORDER OF CDW Government, Inc.
75 Remittance Drive
Suite 1515
Chicago, IL 60675-1515

Jamie D. Dunbar
AUTHORIZED SIGNATURE

16-70383220

⑆0 2 2721⑆⑆⑆ 3 2 20 70 36 1⑆80 3 100 16 24⑆

05/12/2020 22721 \$652.12

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22713
16-70383220

04/20/2020 Void after 180 days
\$*****108.85

****One Hundred Eight and 85/100

PAY TO THE ORDER OF Elizabeth Villarreal
347 Camino de Teodoro
Walnut, CA 91789

Jamie D. Dunbar
AUTHORIZED SIGNATURE

16-70383220

⑆0 2 2713⑆⑆⑆ 3 2 20 70 36 1⑆80 3 100 16 24⑆

05/04/2020 22713 \$108.85

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22722
16-70383220

05/04/2020 Void after 180 days
\$*****476.00

****Four Hundred Seventy Six and 00/100

PAY TO THE ORDER OF CT Corporation System
P.O. Box 4349
Carol Stream, IL 60197-4349

Jamie D. Dunbar
AUTHORIZED SIGNATURE

16-70383220

⑆0 2 2722⑆⑆⑆ 3 2 20 70 36 1⑆80 3 100 16 24⑆

05/18/2020 22722 \$476.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22717
16-70383220

05/04/2020 Void after 180 days
\$*****29,324.40

****Twenty Nine Thousand Three Hundred Twenty Four and 40/100

PAY TO THE ORDER OF Alltech Enterprises, LLC
320 N Halstead St.
Pasadena, CA 91107

Jamie D. Dunbar
Cynthia Hansen
AUTHORIZED SIGNATURE

16-70383220

⑆0 2 2717⑆⑆⑆ 3 2 20 70 36 1⑆80 3 100 16 24⑆

05/07/2020 22717 \$29,324.40

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22723
16-70383220

05/04/2020 Void after 180 days
\$*****8,415.20

****Eight Thousand Four Hundred Fifteen and 20/100

PAY TO THE ORDER OF Education Management Systems, Inc *
320 N. Halstead St
Suite 220
Pasadena, CA 91107

Jamie D. Dunbar
Cynthia Hansen
AUTHORIZED SIGNATURE

16-70383220

⑆0 2 2723⑆⑆⑆ 3 2 20 70 36 1⑆80 3 100 16 24⑆

05/07/2020 22723 \$8,415.20

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22718
16-70383220

05/04/2020 Void after 180 days
\$*****5,561.18

****Five Thousand Five Hundred Sixty One and 18/100

PAY TO THE ORDER OF American Express (TX)
PO BOX 650448
Dallas, TX 75285-0448

Jamie D. Dunbar
Cynthia Hansen
AUTHORIZED SIGNATURE

16-70383220

⑆0 2 2718⑆⑆⑆ 3 2 20 70 36 1⑆80 3 100 16 24⑆

05/08/2020 22718 \$5,561.18

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22724
16-70383220

05/04/2020 Void after 180 days
\$*****410.82

****Four Hundred Ten and 82/100

PAY TO THE ORDER OF Frontier Communications
P.O. Box 740407
Cincinnati, OH 45274

Jamie D. Dunbar
AUTHORIZED SIGNATURE

16-70383220

⑆0 2 2724⑆⑆⑆ 3 2 20 70 36 1⑆80 3 100 16 24⑆

05/15/2020 22724 \$410.82

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22725
16-7038/3220

05/04/2020 Void after 180 days
\$*****80.41

****Eighty and 41/100

PAY TO THE ORDER OF MR. Copy, Inc.
c/o MRC Smart Technology Solutions
P.O. BOX 343780
Los Angeles, CA 90084-3780

Jamie L. Dasher
AUTHORIZED SIGNATURE

#0 2 2 7 2 5 *** 3 2 2 0 7 0 3 8 1 4 8 0 3 1 0 0 1 6 2 4 *

05/11/2020 22725 \$80.41

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22731
16-7038/3220

05/04/2020 Void after 180 days
\$*****493.30

****Four Hundred Ninety Three and 30/100

PAY TO THE ORDER OF Verizon Wireless
P.O. Box 660108
Dallas, TX 75268-0108

Jamie L. Dasher
AUTHORIZED SIGNATURE

#0 2 2 7 3 1 *** 3 2 2 0 7 0 3 8 1 4 8 0 3 1 0 0 1 6 2 4 *

05/12/2020 22731 \$493.30

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22726
16-7038/3220

05/04/2020 Void after 180 days
\$*****787.11

****Seven Hundred Eighty Seven and 11/100

PAY TO THE ORDER OF Poney Boxes Purchase Power
P.O. Box 371874
Pittsburgh, PA 15250-7874

Jamie L. Dasher
AUTHORIZED SIGNATURE

#0 2 2 7 2 6 *** 3 2 2 0 7 0 3 8 1 4 8 0 3 1 0 0 1 6 2 4 *

05/15/2020 22726 \$787.11

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22732
16-7038/3220

05/04/2020 Void after 180 days
\$*****556.42

****Five Hundred Fifty Six and 42/100

PAY TO THE ORDER OF Verizon Wireless
P.O. Box 660108
Dallas, TX 75268-0108

Jamie L. Dasher
AUTHORIZED SIGNATURE

#0 2 2 7 3 2 *** 3 2 2 0 7 0 3 8 1 4 8 0 3 1 0 0 1 6 2 4 *

05/12/2020 22732 \$556.42

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22727
16-7038/3220

05/04/2020 Void after 180 days
\$*****31.96

****Thirty One and 96/100

PAY TO THE ORDER OF ReadyRefresh By Nestle
a Division of Nestle Waters North America Inc.
P.O. Box 856158
Louisville, KY 40285-6158

Jamie L. Dasher
AUTHORIZED SIGNATURE

#0 2 2 7 2 7 *** 3 2 2 0 7 0 3 8 1 4 8 0 3 1 0 0 1 6 2 4 *

05/14/2020 22727 \$31.96

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22733
16-7038/3220

05/04/2020 Void after 180 days
\$*****12,841.00

****Twelve Thousand Eight Hundred Forty One and 00/100

PAY TO THE ORDER OF Vipul Chitania
dba The Advertising Specialist, T.A.S.
841 E. Route 66
Glendora, CA 91740

Jamie L. Dasher
Cynthia Hansen
AUTHORIZED SIGNATURE

#0 2 2 7 3 3 *** 3 2 2 0 7 0 3 8 1 4 8 0 3 1 0 0 1 6 2 4 *

05/20/2020 22733 \$12,841.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22728
16-7038/3220

05/04/2020 Void after 180 days
\$*****15.59

****Fifteen and 59/100

PAY TO THE ORDER OF Ricoh USA, Inc.
P.O. Box 31001-0850
Pasadena, CA 91110-0850

Jamie L. Dasher
AUTHORIZED SIGNATURE

#0 2 2 7 2 8 *** 3 2 2 0 7 0 3 8 1 4 8 0 3 1 0 0 1 6 2 4 *

05/11/2020 22728 \$15.59

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22734
16-7038/3220

05/18/2020 Void after 180 days
\$*****209,587.79

****Two Hundred Nine Thousand Five Hundred Eighty Seven and 79/100

PAY TO THE ORDER OF 9 Dot Education Solutions, LLC
320 N. Halstead St.
Pasadena, CA 91107-3141

Jamie L. Dasher
Cynthia Hansen
AUTHORIZED SIGNATURE

#0 2 2 7 3 4 *** 3 2 2 0 7 0 3 8 1 4 8 0 3 1 0 0 1 6 2 4 *

05/29/2020 22734 \$209,587.79

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22729
16-7038/3220

05/04/2020 Void after 180 days
\$*****17.42

****Seventeen and 42/100

PAY TO THE ORDER OF Skyrocket, Inc.
320 N. Halstead St
Suite 260
Pasadena, CA 91107

Jamie L. Dasher
AUTHORIZED SIGNATURE

#0 2 2 7 2 9 *** 3 2 2 0 7 0 3 8 1 4 8 0 3 1 0 0 1 6 2 4 *

05/07/2020 22729 \$17.42

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22736
16-7038/3220

05/18/2020 Void after 180 days
\$*****109.27

****One Hundred Nine and 27/100

PAY TO THE ORDER OF AT&T
PO Box 5025
Carol Stream, IL 60197-5025

Jamie L. Dasher
AUTHORIZED SIGNATURE

#0 2 2 7 3 6 *** 3 2 2 0 7 0 3 8 1 4 8 0 3 1 0 0 1 6 2 4 *

05/27/2020 22736 \$109.27

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22730
16-7038/3220

05/04/2020 Void after 180 days
\$*****168.54

****One Hundred Sixty Eight and 54/100

PAY TO THE ORDER OF Verizon Wireless
P.O. Box 660108
Dallas, TX 75268-0108

Jamie L. Dasher
AUTHORIZED SIGNATURE

#0 2 2 7 3 0 *** 3 2 2 0 7 0 3 8 1 4 8 0 3 1 0 0 1 6 2 4 *

05/12/2020 22730 \$168.54

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22737
16-7038/3220

05/18/2020 Void after 180 days
\$*****86.56

****Eighty Six and 56/100

PAY TO THE ORDER OF AT&T
PO Box 5025
Carol Stream, IL 60197-5025

Jamie L. Dasher
AUTHORIZED SIGNATURE

#0 2 2 7 3 7 *** 3 2 2 0 7 0 3 8 1 4 8 0 3 1 0 0 1 6 2 4 *

05/27/2020 22737 \$86.56

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22738
16-70383220

05/18/2020 Void after 180 days
\$*****48.39

****Forty Eight and 39/100

PAY TO THE ORDER OF AT&T
PO Box 5025
Carol Stream, IL 60197-5025

Jamie L. Dasher
AUTHORIZED SIGNATURE

#02273800132207038168031001624

05/27/2020 22738 \$48.39

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22748
16-70383220

05/18/2020 Void after 180 days
\$*****107.49

****One Hundred Seven and 49/100

PAY TO THE ORDER OF FP Mailing Solutions
P.O. Box 157
Bedford Park, IL 60499-0157

Jamie L. Dasher
AUTHORIZED SIGNATURE

#02274800132207038168031001624

05/26/2020 22748 \$107.49

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22739
16-70383220

05/18/2020 Void after 180 days
\$*****83.28

****Eighty Three and 28/100

PAY TO THE ORDER OF AT&T
PO Box 5025
Carol Stream, IL 60197-5025

Jamie L. Dasher
AUTHORIZED SIGNATURE

#02273900132207038168031001624

05/27/2020 22739 \$83.28

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22749
16-70383220

05/18/2020 Void after 180 days
\$*****100.00

****One Hundred and 00/100

PAY TO THE ORDER OF IGOE
Administrative Services
P.O. Box 501480
San Diego, CA 92150-1480

Jamie L. Dasher
AUTHORIZED SIGNATURE

#02274900132207038168031001624

05/22/2020 22749 \$100.00

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22740
16-70383220

05/18/2020 Void after 180 days
\$*****27.46

****Twenty Seven and 46/100

PAY TO THE ORDER OF AT&T Long Distance
P.O. Box 5017
Carol Stream, IL 60197-5017

Jamie L. Dasher
AUTHORIZED SIGNATURE

#02274000132207038168031001624

05/26/2020 22740 \$27.46

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22750
16-70383220

05/18/2020 Void after 180 days
\$*****118.83

****One Hundred Eighteen and 83/100

PAY TO THE ORDER OF Iron Mountain
P.O. Box 801002
Pasadena, CA 91189-1002

Jamie L. Dasher
AUTHORIZED SIGNATURE

#02275000132207038168031001624

05/21/2020 22750 \$118.83

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22743
16-70383220

05/18/2020 Void after 180 days
\$*****2,587.50

****Two Thousand Five Hundred Eighty Seven and 50/100

PAY TO THE ORDER OF Blank Rome LLP
Attn: Cash Receipts One Logal Square
130 North 18th Street
Philadelphia, PA 19103-6998

Jamie L. Dasher
AUTHORIZED SIGNATURE

#02274300132207038168031001624

05/28/2020 22743 \$2,587.50

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22751
16-70383220

05/18/2020 Void after 180 days
\$*****1,044.80

****One Thousand Forty Four and 80/100

PAY TO THE ORDER OF KC Digital Solutions INC.
540 S. State College Blvd.
Building 88
Fullerton, CA 92831

Jamie L. Dasher
AUTHORIZED SIGNATURE

#02275100132207038168031001624

05/27/2020 22751 \$1,044.80

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22746
16-70383220

05/18/2020 Void after 180 days
\$*****26.62

****Twenty Six and 62/100

PAY TO THE ORDER OF FedEx
P.O. Box 7221
Pasadena, CA 91109-7321

Jamie L. Dasher
AUTHORIZED SIGNATURE

#02274600132207038168031001624

05/22/2020 22746 \$26.62

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22753
16-70383220

05/18/2020 Void after 180 days
\$*****3,325.00

****Three Thousand Three Hundred Twenty Five and 00/100

PAY TO THE ORDER OF Michelle Won
dba Law offices of Michelle Won
P.O. Box 4254
Glendale, CA 91222

Jamie L. Dasher
AUTHORIZED SIGNATURE

#02275300132207038168031001624

05/22/2020 22753 \$3,325.00

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22747
16-70383220

05/18/2020 Void after 180 days
\$*****331.31

****Three Hundred Thirty One and 31/100

PAY TO THE ORDER OF FedEx
P.O. Box 7221
Pasadena, CA 91109-7321

Jamie L. Dasher
AUTHORIZED SIGNATURE

#02274700132207038168031001624

05/22/2020 22747 \$331.31

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand
Avenue
Suite 100
Los Angeles, CA
90017

22755
16-70383220

05/18/2020 Void after 180 days
\$*****425.00

****Four Hundred Twenty Five and 00/100

PAY TO THE ORDER OF Pathways In Education, Inc.
320 N. Halstead St
Suite 260
Pasadena, CA 91107

Jamie L. Dasher
AUTHORIZED SIGNATURE

#02275500132207038168031001624

05/29/2020 22755 \$425.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22756
 16-7038/3220

05/18/2020 Void after 180 days
 \$*****141.12

*****One Hundred Forty One and 12/100

PAY TO THE ORDER OF Philadelphia Indemnity Insurance Company
 Three Bala Plaza East
 Suite 400
 Bala Cynwyd, PA 19004

Jamie L. Decker
 AUTHORIZED SIGNATURE

#0 2 2756 3 2 20 70 38 1 580 3 100 16 24

05/26/2020 22756 \$141.12

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22763
 16-7038/3220

05/18/2020 Void after 180 days
 \$*****60.00

*****Sixty and 00/100

PAY TO THE ORDER OF Yorgason Law Offices, PLLC
 6200 N Meeker Place
 Boise, ID 83713

Jamie L. Decker
 AUTHORIZED SIGNATURE

#0 2 2763 3 2 20 70 38 1 580 3 100 16 24

05/29/2020 22763 \$60.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22758
 16-7038/3220

05/18/2020 Void after 180 days
 \$*****190.00

*****One Hundred Ninety and 00/100

PAY TO THE ORDER OF RELX Inc
 dba LexisNexis
 P.O. Box 23103
 Dallas, TX 75373-3106

Jamie L. Decker
 AUTHORIZED SIGNATURE

#0 2 2758 3 2 20 70 38 1 580 3 100 16 24

05/26/2020 22758 \$190.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22764
 16-7038/3220

05/18/2020 Void after 180 days
 \$*****129.99

*****One Hundred Twenty Nine and 99/100

PAY TO THE ORDER OF Gregory Marrero
 6600 Warner Ave, #5
 Huntington Beach, CA 92647

Jamie L. Decker
 AUTHORIZED SIGNATURE

#0 2 2764 3 2 20 70 38 1 580 3 100 16 24

05/26/2020 22764 \$129.99

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22759
 16-7038/3220

05/18/2020 Void after 180 days
 \$*****332.55

*****Three Hundred Thirty Two and 55/100

PAY TO THE ORDER OF Ricoh USA, Inc.
 P.O. Box 31001-0850
 Pasadena, CA 91110-0850

Jamie L. Decker
 AUTHORIZED SIGNATURE

#0 2 2759 3 2 20 70 38 1 580 3 100 16 24

05/22/2020 22759 \$332.55

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22765
 16-7038/3220

05/18/2020 Void after 180 days
 \$*****150.00

*****One Hundred Fifty and 00/100

PAY TO THE ORDER OF Education Dynamics, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

Jamie L. Decker
 AUTHORIZED SIGNATURE

#0 2 2765 3 2 20 70 38 1 580 3 100 16 24

05/29/2020 22765 \$150.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22760
 16-7038/3220

05/18/2020 Void after 180 days
 \$*****1,310.00

75896.00
 *****One Thousand Three Hundred Ten and 00/100

PAY TO THE ORDER OF Snell & Wilmer LLP
 One Arizona Center
 400 E Van Buren, Suite 1900
 Phoenix, AZ 85004-2202

Jamie L. Decker
 AUTHORIZED SIGNATURE

#0 2 2760 3 2 20 70 38 1 580 3 100 16 24

05/22/2020 22760 \$1,310.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22761
 16-7038/3220

05/18/2020 Void after 180 days
 \$*****559.76

21
 *****Five Hundred Fifty Nine and 76/100

PAY TO THE ORDER OF Staples Advantage
 Staples Business Advantage
 P.O. Box 550409
 Dallas, TX 75266

Jamie L. Decker
 AUTHORIZED SIGNATURE

#0 2 2761 3 2 20 70 38 1 580 3 100 16 24

05/26/2020 22761 \$559.76

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES. SEE BACK FOR DETAILS.

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22762
 16-7038/3220

05/18/2020 Void after 180 days
 \$*****217.83

*****Two Hundred Seventeen and 83/100

PAY TO THE ORDER OF Tractor Supply Co.
 Dept 30 - 110377130
 P.O. Box 78004
 Phoenix, AZ 85062-8004

Jamie L. Decker
 AUTHORIZED SIGNATURE

#0 2 2762 3 2 20 70 38 1 580 3 100 16 24

05/26/2020 22762 \$217.83

STATEMENT BALANCING

Fill in the amounts below from the front of this statement and your checkbook.

ENTER

Ending Balance of this Statement..... \$ _____

Add Deposits not shown on this Statement \$ _____

Sub Total..... \$ _____

Subtract Checks Issued but not on Statement

CHECK NUMBER OR DATE	AMOUNT	CHECK NUMBER OR DATE	AMOUNT
TOTAL		TOTAL	

Total amount of outstanding checks..... \$ _____

Balance.....** \$ _____

ENTER

Present Balance in your checkbook..... \$ _____

Subtract any service charges, finance or any other charges..... \$ _____

Sub Total \$ _____

Add Monthly Interest Earned \$ _____

Add any deposits not yet entered in checkbook (Reverse Advances)..... \$ _____

Subtract any checks not yet entered in checkbook (Reverse Payments)..... \$ _____

Balance..... \$ _____

IN CASE OF ERRORS OR QUESTIONS REGARDING YOUR CHECKING ACCOUNT

You must examine your statement carefully and promptly. You are in the best position to discover errors and unauthorized transactions on your account. If you fail to notify us in writing of suspected problems or unauthorized transactions within the time periods as specified in the Deposit Agreement (which periods are no more than 60 days after we make the statement available to you and in some cases 30 days or less), we are not liable to you for, and you agree not to make a claim against us for problems or unauthorized transactions.

IN CASE OF ERRORS OR QUESTIONS ABOUT YOUR ELECTRONIC FUNDS TRANSFERS

Telephone or write your local branch of account, listed on the statement front, as soon as you can if you think your statement or receipt is wrong or if you need more information about a transfer on the statement or receipt. We must hear from you no later than 60 days after we send you the FIRST statement on which the error or problem appeared.

1. Tell us your name and account number.
2. Describe the error or the transfer you are unsure about and explain as clearly as you can why you believe there is an error or why you need more information.
3. Tell us the dollar amount of the suspected error.

We will investigate your complaint and will correct any error promptly. If our investigation takes longer than 10 business days from the date we received your notification, we will provisionally credit your account for the disputed amount until our investigation has been completed. If the disputed amount involves an electronic funds transfer to or from an account within 30 days after the first deposit to the account was made, we will provisionally credit your account within 20 business days from the date we receive your notification.

ACCOUNTS WITH CHECK STORAGE

Upon your request, we will provide you, without charge, legible copies of two checks from each account statement. Additional copies of canceled checks are subject to our service charges. You can make a request for these copies by contacting the branch listed on the front of this statement.

CHANGE OF ADDRESS

Please notify us immediately for change of address by phoning or writing your local branch of account, listed on the front of this statement.

MEMBER FDIC

624 S Grand Ave, Suite 100
 Los Angeles, CA 90017

 Direct inquiries to:
 213 688-8600

ACCOUNT STATEMENT

 Page 1 of 5
 STARTING DATE: June 01, 2020
 ENDING DATE: June 30, 2020
 Total days in statement period: 30
 80-31001624
 (36)

 PATHWAYS MANAGEMENT GROUP, INC.
 320 N HALSTEAD ST SUITE # 280
 PASADENA CA 91107

We'll restart strong. And we'll restart together. When you're ready to restart, count on us to help you reach further. We are here for you - then, now, and tomorrow. Visit eastwestbank.com to learn more.

Commercial Analysis Checking

Account number	80-31001624	Beginning balance		\$14,101,569.79
Enclosures	36	Total additions	(3)	120,897.77
Low balance	\$13,811,982.18	Total subtractions	(51)	401,502.41
Average balance	\$13,885,751.13	Ending balance		\$13,820,965.15

CREDITS

Number	Date	Transaction Description	Additions
	06-12	Deposit	95,341.05
	06-18	Pre-Auth Credit COUNTY OF SAN BE ACHPAYMENT 200618	25,511.85
	06-26	Pre-Auth Credit OSV REFUND TAX REFUND TAX 200626 CR1557039	44.87

CHECKS

Number	Date	Amount	Number	Date	Amount
741	06-08	1,079.30	22777	06-05	250.51
22735 *	06-03	6,987.04	22778	06-12	2,051.00
22741 *	06-03	1,163.00	22779	06-11	73.97
22742	06-03	6,195.36	22780	06-12	34.96
22744 *	06-16	8,102.53	22781	06-12	50.70
22745	06-01	13,200.00	22782	06-10	168.54
22754 *	06-10	15,000.00	22783	06-12	2,360.79
22757 *	06-02	50.70	22784	06-24	27.61
22766 *	06-16	2,775.96	22788 *	06-22	119.99
22767	06-12	752.44	22791 *	06-24	100.00
22768	06-04	330.32	22793 *	06-23	349.60
22769	06-04	189,096.38	22794	06-22	775.00
22770	06-09	58.13	22796 *	06-24	17,709.13
22771	06-09	490.86	22798 *	06-22	311.75
22772	06-09	503.85	22799	06-23	210.02
22773	06-16	11,805.81	22800	06-23	554.94
22774	06-12	4.00	22801	06-17	1,240.00
22775	06-16	4,030.26			
22776	06-12	6,810.96			

* Skip in check sequence

PATHWAYS MANAGEMENT GROUP, INC.

DEBITS

Date	Transaction Description	Subtractions
06-02	Preauth Debit OSVPayroll 0000156253 200602 MNY-0006963244	1,351.93
06-03	Preauth Debit OSV TAX COL TAX COL 200603 CC 1563961	640.40
06-05	Preauth Debit OSVPayroll 0000156933 200605 MNY-0006976064	2,296.86
06-08	Preauth Debit OSV TAX COL TAX COL 200608 CC 1566074	1,003.50
06-08	Preauth Debit GREAT-WEST TRUST PAYMENTS 200608 706079789749	4,185.98
06-09	Preauth Debit OSV TAX COL TAX COL 200609 CC 1566436	772.28
06-10	Preauth Debit OSV TAX COL TAX COL 200610 CC 1566719	1,514.72
06-10	Preauth Debit OSVPayroll 0000157359 200610 MNY-0006998936	1,559.17
06-10	Preauth Debit OSVPayroll 0000157359 200610 MNY-0006998944	28,671.31
06-11	Preauth Debit OSV TAX COL TAX COL 200611 CC 1567473	12,943.50
06-22	Preauth Debit GREAT-WEST TRUST PAYMENTS 200622 707946794642	5,271.93
06-24	Preauth Debit OSV TAX COL TAX COL 200624 CC 1576170	1,034.46
06-24	Preauth Debit OSVPayroll 0000158765 200624 MNY-0007078453	1,410.79
06-24	Preauth Debit OSVPayroll 0000158765 200624 MNY-0007078438	30,384.39
06-25	Preauth Debit OSV TAX COL TAX COL 200625 CC 1576873	13,635.78

DAILY BALANCES

Date	Amount	Date	Amount	Date	Amount
05-31	14,101,569.79	06-09	13,871,913.39	06-22	13,886,337.00
06-01	14,088,369.79	06-10	13,824,999.65	06-23	13,885,222.44
06-02	14,086,967.16	06-11	13,811,982.18	06-24	13,834,556.06
06-03	14,071,981.36	06-12	13,895,258.38	06-25	13,820,920.28
06-04	13,882,554.66	06-16	13,868,543.82	06-26	13,820,965.15
06-05	13,880,007.29	06-17	13,867,303.82		
06-08	13,873,738.51	06-18	13,892,815.67		

OVERDRAFT/RETURN ITEM FEES

	Total for this period	Total year-to-date
Total Overdraft Fees	\$0.00	\$0.00
Total Returned Item Fees	\$0.00	\$0.00

THE PAYEE HAS PROMISED TO AVOID ANY BACKGROUND CHECKS AND TO PROVIDE AN AFFIRMATIVE INTERVIEW TO BE CONDUCTED BY THE BANK.

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

DATE 06/05/2020 000

\$ ****1,079.30 US Dollar

One Thousand Seventy Nine and 30/100

PAY TO THE ORDER OF Nancy Valdez
 905 W. Walnut Ave. #A
 Monrovia, CA 91016

EAST WEST BANK
 624 SOUTH GRAND AVENUE, SUITE 100
 LOS ANGELES, CA 90017

Cynthia Hansen
 AUTHORIZED SIGNATURE

150007410001:32207038118031001624

06/08/2020 741 \$1,079.30

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22754
 16-70383220

05/18/2020 Void after 180 days
 \$*****15,000.00

****Fifteen Thousand and 00/100

PAY TO THE ORDER OF Momentum Strategy & Research
 P.O. Box 100815
 Denver, CO 80250

Jamie D. Dasher
 AUTHORIZED SIGNATURE

Cynthia Hansen
 AUTHORIZED SIGNATURE

1502275410001:32207038118031001624

06/10/2020 22754 \$15,000.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22735
 16-70383220

05/18/2020 Void after 180 days
 \$*****6,987.04

154302

****Six Thousand Nine Hundred Eighty Seven and 04/100

PAY TO THE ORDER OF American Express (TX)
 PO BOX 650448
 Dallas, TX 75265-0448

Jamie D. Dasher
 AUTHORIZED SIGNATURE

Cynthia Hansen
 AUTHORIZED SIGNATURE

10150DAL

1502273510001:32207038118031001624

06/03/2020 22735 \$6,987.04

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22757
 16-70383220

05/18/2020 Void after 180 days
 \$*****50.70

****Fifty and 70/100

PAY TO THE ORDER OF Ready/Refresh By Nestle
 A Division of Nestle Waters North America Inc.
 Louisville, KY 40285-6158

Jamie D. Dasher
 AUTHORIZED SIGNATURE

Cynthia Hansen
 AUTHORIZED SIGNATURE

1502275710001:32207038118031001624

06/02/2020 22757 \$50.70

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22741
 16-70383220

05/18/2020 Void after 180 days
 \$*****1,163.00

****One Thousand One Hundred Sixty Three and 00/100

PAY TO THE ORDER OF Berkshire Hathaway Homestate Companies
 P.O. Box 844501
 Los Angeles, CA 90084-4501

Jamie D. Dasher
 AUTHORIZED SIGNATURE

Cynthia Hansen
 AUTHORIZED SIGNATURE

1502274110001:32207038118031001624

06/03/2020 22741 \$1,163.00

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22766
 16-70383220

05/26/2020 Void after 180 days
 \$*****2,775.96

****Two Thousand Seven Hundred Seventy Five and 96/100

PAY TO THE ORDER OF Blue Cross of California
 dba Anthem Blue Cross
 P.O. Box 511303
 Los Angeles, CA 90051

Jamie D. Dasher
 AUTHORIZED SIGNATURE

Cynthia Hansen
 AUTHORIZED SIGNATURE

1502276610001:32207038118031001624

06/16/2020 22766 \$2,775.96

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22742
 16-70383220

05/18/2020 Void after 180 days
 \$*****6,195.36

****Six Thousand One Hundred Ninety Five and 36/100

PAY TO THE ORDER OF Berkshire Hathaway Homestate Companies
 P.O. Box 844501
 Los Angeles, CA 90084-4501

Jamie D. Dasher
 AUTHORIZED SIGNATURE

Cynthia Hansen
 AUTHORIZED SIGNATURE

1502274210001:32207038118031001624

06/03/2020 22742 \$6,195.36

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22767
 16-70383220

05/26/2020 Void after 180 days
 \$*****752.44

****Seven Hundred Fifty Two and 44/100

PAY TO THE ORDER OF Hawkeye Properties Inc
 320 N. Halstead Street
 Suite#280
 Pasadena, CA 91107

Jamie D. Dasher
 AUTHORIZED SIGNATURE

Cynthia Hansen
 AUTHORIZED SIGNATURE

1502276710001:32207038118031001624

06/12/2020 22767 \$752.44

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22744
 16-70383220

05/18/2020 Void after 180 days
 \$*****8,102.53

****Eight Thousand One Hundred Two and 53/100

PAY TO THE ORDER OF Blue Cross of California
 dba Anthem Blue Cross
 P.O. Box 511303
 Los Angeles, CA 90051

Jamie D. Dasher
 AUTHORIZED SIGNATURE

Cynthia Hansen
 AUTHORIZED SIGNATURE

1502274410001:32207038118031001624

06/16/2020 22744 \$8,102.53

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22768
 16-70383220

06/01/2020 Void after 180 days
 \$*****330.32

****Three Hundred Thirty and 32/100

PAY TO THE ORDER OF Skyrocket, Inc
 320 N Halstead St.
 Pasadena, CA 91107

Jamie D. Dasher
 AUTHORIZED SIGNATURE

Cynthia Hansen
 AUTHORIZED SIGNATURE

1502276810001:32207038118031001624

06/04/2020 22768 \$330.32

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22745
 16-70383220

05/18/2020 Void after 180 days
 \$*****13,200.00

****Thirteen Thousand Two Hundred and 00/100

PAY TO THE ORDER OF Cogna, Inc.
 Advanced Education, Inc
 P.O. Box 933823
 Atlanta, GA 31193-3823

Jamie D. Dasher
 AUTHORIZED SIGNATURE

Cynthia Hansen
 AUTHORIZED SIGNATURE

1502274510001:32207038118031001624

06/01/2020 22745 \$13,200.00

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22769
 16-70383220

06/01/2020 Void after 180 days
 \$*****189,096.38

****One Hundred Eighty Nine Thousand Ninety Six and 38/100

PAY TO THE ORDER OF 9 Dot Education Solutions, LLC
 650 Sierra Madre Villa Ave
 Pasadena, CA 91107

Jamie D. Dasher
 AUTHORIZED SIGNATURE

Cynthia Hansen
 AUTHORIZED SIGNATURE

1502276910001:32207038118031001624

06/04/2020 22769 \$189,096.38

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22770
16-70383220

06/01/2020 Void after 180 days
\$*****58.13

*****Fifty Eight and 13/100

PAY TO THE ORDER OF AT&T
PO Box 5025
Carol Stream, IL 60197-5025

Jamie L. Dasher
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2 7 7 0 1 ⑆: 3 2 2 0 7 0 3 8 1 ⑆: 8 0 3 1 0 0 1 6 2 4 ⑆

06/09/2020 22770 \$58.13

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22776
16-70383220

06/01/2020 Void after 180 days
\$*****6,810.96

*****Six Thousand Eight Hundred Ten and 96/100

PAY TO THE ORDER OF Hawkeye Properties Inc.
Suite#280
Pasadena, CA 91107

Jamie L. Dasher
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2 7 7 6 ⑆: 3 2 2 0 7 0 3 8 1 ⑆: 8 0 3 1 0 0 1 6 2 4 ⑆

06/12/2020 22776 \$6,810.96

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22771
16-70383220

06/01/2020 Void after 180 days
\$*****490.86

*****Four Hundred Ninety and 86/100

PAY TO THE ORDER OF AT&T Mobility
P.O. Box 6463
Carol Stream, IL 60197-6463

Jamie L. Dasher
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2 7 7 1 ⑆: 3 2 2 0 7 0 3 8 1 ⑆: 8 0 3 1 0 0 1 6 2 4 ⑆

06/09/2020 22771 \$490.86

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22777
16-70383220

06/01/2020 Void after 180 days
\$*****250.51

*****Two Hundred Fifty and 51/100

PAY TO THE ORDER OF Iron Mountain
P.O. Box 601002
Pasadena, CA 91189-1002

Jamie L. Dasher
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2 7 7 7 ⑆: 3 2 2 0 7 0 3 8 1 ⑆: 8 0 3 1 0 0 1 6 2 4 ⑆

06/05/2020 22777 \$250.51

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22772
16-70383220

06/01/2020 Void after 180 days
\$*****503.85

*****Five Hundred Three and 85/100

PAY TO THE ORDER OF AT&T Mobility
P.O. Box 6463
Carol Stream, IL 60197-6463

Jamie L. Dasher
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2 7 7 2 ⑆: 3 2 2 0 7 0 3 8 1 ⑆: 8 0 3 1 0 0 1 6 2 4 ⑆

06/09/2020 22772 \$503.85

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22778
16-70383220

06/01/2020 Void after 180 days
\$*****2,051.00

*****Two Thousand Fifty One and 00/100

PAY TO THE ORDER OF Pathways in Education, Inc.
320 N Halstead St.
Suite 260
Pasadena, CA 91107

Jamie L. Dasher
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2 7 7 8 ⑆: 3 2 2 0 7 0 3 8 1 ⑆: 8 0 3 1 0 0 1 6 2 4 ⑆

06/12/2020 22778 \$2,051.00

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22773
16-70383220

06/01/2020 Void after 180 days
\$*****11,805.81

*****Eleven Thousand Eight Hundred Five and 81/100

PAY TO THE ORDER OF Blue Cross of California
dba Anthem Blue Cross
P.O. Box 511300
Los Angeles, CA 90051

Jamie L. Dasher
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2 7 7 3 ⑆: 3 2 2 0 7 0 3 8 1 ⑆: 8 0 3 1 0 0 1 6 2 4 ⑆

06/16/2020 22773 \$11,805.81

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22779
16-70383220

06/01/2020 Void after 180 days
\$*****73.97

*****Seventy Three and 97/100

PAY TO THE ORDER OF Pitney Bowes Purchase Power
P.O. Box 371874
Pittsburgh, PA 15250-7874

Jamie L. Dasher
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2 7 7 9 ⑆: 3 2 2 0 7 0 3 8 1 ⑆: 8 0 3 1 0 0 1 6 2 4 ⑆

06/11/2020 22779 \$73.97

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22774
16-70383220

06/01/2020 Void after 180 days
\$*****4.00

*****Four and 00/100

PAY TO THE ORDER OF City of Pasadena Finance
Business License Section
100 N. Garfield Ave, Room 106
Pasadena, CA 91109

Jamie L. Dasher
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2 7 7 4 ⑆: 3 2 2 0 7 0 3 8 1 ⑆: 8 0 3 1 0 0 1 6 2 4 ⑆

06/12/2020 22774 \$4.00

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22780
16-70383220

06/01/2020 Void after 180 days
\$*****34.96

*****Thirty Four and 96/100

PAY TO THE ORDER OF Ready/Refresh By Nestle
a Division of Nestle Waters North America Inc.
P.O. Box 856158
Louisville, KY 40285-6158

Jamie L. Dasher
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2 7 8 0 ⑆: 3 2 2 0 7 0 3 8 1 ⑆: 8 0 3 1 0 0 1 6 2 4 ⑆

06/12/2020 22780 \$34.96

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22775
16-70383220

06/01/2020 Void after 180 days
\$*****4,030.26

*****Four Thousand Thirty and 26/100

PAY TO THE ORDER OF Guardian - Appleton
P.O. Box 67458
Dallas, TX 75267-7458

Jamie L. Dasher
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2 7 7 5 ⑆: 3 2 2 0 7 0 3 8 1 ⑆: 8 0 3 1 0 0 1 6 2 4 ⑆

06/16/2020 22775 \$4,030.26

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22781
16-70383220

06/01/2020 Void after 180 days
\$*****50.70

*****Fifty and 70/100

PAY TO THE ORDER OF Ready/Refresh By Nestle
a Division of Nestle Waters North America Inc.
P.O. Box 856158
Louisville, KY 40285-6158

Jamie L. Dasher
AUTHORIZED SIGNATURE

1670383220

⑆0 2 2 7 8 1 ⑆: 3 2 2 0 7 0 3 8 1 ⑆: 8 0 3 1 0 0 1 6 2 4 ⑆

06/12/2020 22781 \$50.70

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22782
16-70383220

06/01/2020

Void after 180 days
\$*****168.54

****One Hundred Sixty Eight and 54/100

PAY TO THE ORDER OF Verizon Wireless
P.O. Box 660108
Dallas, TX 75268-0108

Jamie D. Daucher
AUTHORIZED SIGNATURE

1870

⑆0 2 2 7 8 2 1 1 3 2 2 0 7 0 3 8 1 1 8 0 3 1 0 0 1 6 2 4 1 8 ⑆

06/10/2020 22782 \$168.54

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22794
16-70383220

06/15/2020

Void after 180 days
\$*****775.00

****Seven Hundred Seventy Five and 00/100

PAY TO THE ORDER OF Michelle Won
dba Law Offices of Michelle Won
P.O. Box 4254
Glendale, CA 91222

Jamie D. Daucher
AUTHORIZED SIGNATURE

1870

⑆0 2 2 7 9 4 1 1 3 2 2 0 7 0 3 8 1 1 8 0 3 1 0 0 1 6 2 4 1 8 ⑆

06/22/2020 22794 \$775.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22783
16-70383220

06/01/2020

Void after 180 days
\$*****2,360.79

****Two Thousand Three Hundred Sixty and 79/100

PAY TO THE ORDER OF Xerox Financial Services
P.O. Box 202882
Dallas, TX 75320-2882

Jamie D. Daucher
AUTHORIZED SIGNATURE

1870

⑆0 2 2 7 8 3 1 1 3 2 2 0 7 0 3 8 1 1 8 0 3 1 0 0 1 6 2 4 1 8 ⑆

06/12/2020 22783 \$2,360.79

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22796
16-70383220

06/15/2020

Void after 180 days
\$*****17,709.13

****Seventeen Thousand Seven Hundred Nine and 13/100

PAY TO THE ORDER OF OneSource Virtual HR, Inc
Dept 3020
P.O. Box 123020
Dallas, TX 75312-3020

Jamie D. Daucher
AUTHORIZED SIGNATURE

1870

⑆0 2 2 7 9 6 1 1 3 2 2 0 7 0 3 8 1 1 8 0 3 1 0 0 1 6 2 4 1 8 ⑆

06/24/2020 22796 \$17,709.13

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22784
16-70383220

06/15/2020

Void after 180 days
\$*****27.61

****Twenty Seven and 61/100

PAY TO THE ORDER OF AT&T Long Distance
P.O. Box 5017
Carol Stream, IL 60197-5017

Jamie D. Daucher
AUTHORIZED SIGNATURE

1870

⑆0 2 2 7 8 4 1 1 3 2 2 0 7 0 3 8 1 1 8 0 3 1 0 0 1 6 2 4 1 8 ⑆

06/24/2020 22784 \$27.61

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22798
16-70383220

06/15/2020

Void after 180 days
\$*****311.75

****Three Hundred Eleven and 75/100

PAY TO THE ORDER OF Ricoh USA, Inc
P.O. Box 31001-0850
Pasadena, CA 91110-0850

Jamie D. Daucher
AUTHORIZED SIGNATURE

1870

⑆0 2 2 7 9 8 1 1 3 2 2 0 7 0 3 8 1 1 8 0 3 1 0 0 1 6 2 4 1 8 ⑆

06/22/2020 22798 \$311.75

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22788
16-70383220

06/15/2020

Void after 180 days
\$*****119.99

****One Hundred Nineteen and 99/100

PAY TO THE ORDER OF FedEx
P.O. Box 7221
Pasadena, CA 91109-7321

Jamie D. Daucher
AUTHORIZED SIGNATURE

1870

⑆0 2 2 7 8 8 1 1 3 2 2 0 7 0 3 8 1 1 8 0 3 1 0 0 1 6 2 4 1 8 ⑆

06/22/2020 22788 \$119.99

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22799
16-70383220

06/15/2020

Void after 180 days
\$*****210.02

****Two Hundred Ten and 02/100

PAY TO THE ORDER OF W. Health Advocate Sol Inc.
PO BOX 561509
Denver, CO 80256-1509

Jamie D. Daucher
AUTHORIZED SIGNATURE

1870

⑆0 2 2 7 9 9 1 1 3 2 2 0 7 0 3 8 1 1 8 0 3 1 0 0 1 6 2 4 1 8 ⑆

06/23/2020 22799 \$210.02

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22791
16-70383220

06/15/2020

Void after 180 days
\$*****100.00

****One Hundred and 00/100

PAY TO THE ORDER OF IGOE
Administrative Services
P.O. Box 501480
San Diego, CA 92150-1480

Jamie D. Daucher
AUTHORIZED SIGNATURE

1870

⑆0 2 2 7 9 1 1 1 3 2 2 0 7 0 3 8 1 1 8 0 3 1 0 0 1 6 2 4 1 8 ⑆

06/24/2020 22791 \$100.00

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22800
16-70383220

06/15/2020

Void after 180 days
\$*****554.94

****Five Hundred Fifty Four and 94/100

PAY TO THE ORDER OF Wolters Kluwer Law & Business
PO BOX 71882
Chicago, IL 60694-1882

Jamie D. Daucher
AUTHORIZED SIGNATURE

1870

⑆0 2 2 8 0 0 1 1 3 2 2 0 7 0 3 8 1 1 8 0 3 1 0 0 1 6 2 4 1 8 ⑆

06/23/2020 22800 \$554.94

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22793
16-70383220

06/15/2020

Void after 180 days
\$*****349.60

****Three Hundred Forty Nine and 60/100

PAY TO THE ORDER OF Katie Rhodenbaugh
756 West Steeple View Dr
Eagle, ID 83616

Jamie D. Daucher
AUTHORIZED SIGNATURE

1870

⑆0 2 2 7 9 3 1 1 3 2 2 0 7 0 3 8 1 1 8 0 3 1 0 0 1 6 2 4 1 8 ⑆

06/23/2020 22793 \$349.60

THIS CHECK HAS A COLORED BACKGROUND AND CONTAINS MULTIPLE SECURITY FEATURES - SEE BACK FOR DETAILS

Pathways Management Group, Inc.
320 N Halstead St.
Pasadena, CA 91107

East West Bank
624 South Grand Avenue
Suite 100
Los Angeles, CA 90017

22801
16-70383220

06/15/2020

Void after 180 days
\$*****1,240.00

****One Thousand Two Hundred Forty and 00/100

PAY TO THE ORDER OF Alltech Enterprises, LLC
320 N Halstead St.
Pasadena, CA 91107

Jamie D. Daucher
AUTHORIZED SIGNATURE

1870

⑆0 2 2 8 0 1 1 1 3 2 2 0 7 0 3 8 1 1 8 0 3 1 0 0 1 6 2 4 1 8 ⑆

06/17/2020 22801 \$1,240.00

STATEMENT BALANCING

Fill in the amounts below from the front of this statement and your checkbook.

ENTER

Ending Balance of this Statement..... \$ _____

Add Deposits not shown on this Statement \$ _____

Sub Total..... \$ _____

Subtract Checks Issued but not on Statement

CHECK NUMBER OR DATE	AMOUNT	CHECK NUMBER OR DATE	AMOUNT
TOTAL		TOTAL	

Total amount of outstanding checks..... \$ _____

Balance.....** \$ _____

ENTER

Present Balance in your checkbook..... \$ _____

Subtract any service charges, finance or any other charges..... \$ _____

Sub Total \$ _____

Add Monthly Interest Earned \$ _____

Add any deposits not yet entered in checkbook (Reverse Advances)..... \$ _____

Subtract any checks not yet entered in checkbook (Reverse Payments)..... \$ _____

Balance..... \$ _____

IN CASE OF ERRORS OR QUESTIONS REGARDING YOUR CHECKING ACCOUNT

You must examine your statement carefully and promptly. You are in the best position to discover errors and unauthorized transactions on your account. If you fail to notify us in writing of suspected problems or unauthorized transactions within the time periods as specified in the Deposit Agreement (which periods are no more than 60 days after we make the statement available to you and in some cases 30 days or less), we are not liable to you for, and you agree not to make a claim against us for problems or unauthorized transactions.

IN CASE OF ERRORS OR QUESTIONS ABOUT YOUR ELECTRONIC FUNDS TRANSFERS

Telephone or write your local branch of account, listed on the statement front, as soon as you can if you think your statement or receipt is wrong or if you need more information about a transfer on the statement or receipt. We must hear from you no later than 60 days after we send you the FIRST statement on which the error or problem appeared.

1. Tell us your name and account number.
2. Describe the error or the transfer you are unsure about and explain as clearly as you can why you believe there is an error or why you need more information.
3. Tell us the dollar amount of the suspected error.

We will investigate your complaint and will correct any error promptly. If our investigation takes longer than 10 business days from the date we received your notification, we will provisionally credit your account for the disputed amount until our investigation has been completed. If the disputed amount involves an electronic funds transfer to or from an account within 30 days after the first deposit to the account was made, we will provisionally credit your account within 20 business days from the date we receive your notification.

ACCOUNTS WITH CHECK STORAGE

Upon your request, we will provide you, without charge, legible copies of two checks from each account statement. Additional copies of canceled checks are subject to our service charges. You can make a request for these copies by contacting the branch listed on the front of this statement.

CHANGE OF ADDRESS

Please notify us immediately for change of address by phoning or writing your local branch of account, listed on the front of this statement.

MEMBER FDIC

**PATHWAYS MANAGEMENT
GROUP, INC.**

FINANCIAL STATEMENTS

**For the year ended
June 30, 2017**



INDEPENDENT AUDITOR'S REPORT

The Board of Directors
Pathways Management Group, Inc.
Pasadena, California

We have audited the accompanying financial statements of Pathways Management Group, Inc., (a California nonprofit benefit corporation), which comprise the statement of financial position as of June 30, 2017, and the related statements of activities and cash flows for the year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Pathways Management Group, Inc., as of June 30, 2017, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Contingency

As discussed in Note 9 to the financial statements, in July 2011, Pathways Management Group, Inc. (PMG) received \$5,000,000 of monetary contributions from OFY Upland Charter School. In July 2015, PMG was named as one of the defendants in the lawsuit *California Department of Education et al. v Hawkeye Properties, Inc., et al.* The lawsuit challenges the transfer of assets to the Company in 2011 by OFY Upland Charter School and OFY Mt. Shasta Charter School. According to the complaint, the plaintiffs are seeking to avoid the transfers of approximately \$7,500,000 made by the aforementioned schools to PMG and the other defendants, unspecified punitive damages, and other relief. A trial is scheduled for October 9, 2018. The ultimate outcome of the lawsuit cannot presently be determined. As such, management is not able to make a reasonable estimate of the potential effects, if any, on the financial statements. Accordingly, no provision for a liability that may result has been made in the financial statements. As more information becomes available it is at least reasonably possible that management's view of the outcome will change in the near term. Our opinion is not modified with respect to this matter.

Transactions with affiliates

As discussed in Note 7 to the financial statements, the Company is engaged in transactions with various affiliates to provide management and administrative services and obtain other services for the Company's operations. Our opinion is not modified with respect to this matter.

Concentration

As discussed in Note 2 to the financial statements, transactions with affiliates amounted to 100% of management service revenue for the year ended June 30, 2017. The loss of revenue from affiliates could have a material adverse effect on the Organization. Our opinion is not modified with respect to this matter.

A handwritten signature in blue ink that reads "Maginnis Krechtel & McIntyre, LLP". The signature is written in a cursive, flowing style.

Pasadena, California
March 5, 2018

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

STATEMENT OF FINANCIAL POSITION

June 30, 2017

ASSETS

Current assets	
Cash and cash equivalents	\$ 6,668,416
Accounts receivable from affiliates	9,004,317
Prepaid expenses and other assets	<u>579,083</u>
Total current assets	16,251,816
Lines of credit receivable from affiliates	8,850,000
Fixed assets, net	<u>372,492</u>
Total assets	<u><u>\$ 25,474,308</u></u>

LIABILITIES AND NET ASSETS

Current liabilities	
Accounts payable and accrued expenses	\$ 651,875
Payable to affiliates	<u>1,149,055</u>
Total current liabilities	1,800,930
Deferred revenue	<u>13,186</u>
Total liabilities	1,814,116
Commitments and contingency (Notes 8 and 9)	
Net assets	
Unrestricted	<u>23,660,192</u>
Total liabilities and net assets	<u><u>\$ 25,474,308</u></u>

The accompanying notes are an integral part of these financial statements.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

STATEMENT OF ACTIVITIES

For the year ended June 30, 2017

Revenues	
Management service revenue	\$ 15,981,645
Interest income	292,534
Other revenue	<u>11,582</u>
Total revenues	16,285,761
Expenses	
Program services	9,963,826
Management and general	1,163,123
Bad debt expense	1,821,392
Donation to affiliate	<u>617,111</u>
Total expenses	<u>13,565,452</u>
Change in net assets	2,720,309
Net assets, beginning of year	<u>20,939,883</u>
Net assets, end of year	<u><u>\$ 23,660,192</u></u>

The accompanying notes are an integral part of these financial statements.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

STATEMENT OF CASH FLOWS

For the year ended June 30, 2017

Cash flows from operating activities:	
Change in net assets	\$ 2,720,309
Adjustments to reconcile change in net assets to	
Net cash (used) by operating activities	
Depreciation expense	127,490
Changes in operating assets and liabilities	
(Increase) in accounts receivable from affiliates	(3,024,803)
(Increase) in prepaid expenses and other assets	(520,974)
(Decrease) in accounts payable and accrued expenses	(148,955)
Increase in payable to affiliates	649,055
	<hr/>
Net cash (used) by operating activities	(197,878)
Cash flows from investing activities:	
Capital expenditures	(27,683)
Collections on loans to affiliates	2,000,000
Loans made to affiliates	(1,600,000)
	<hr/>
Net cash provided by investing activities	372,317
Net increase in cash	174,439
Cash and cash equivalents, beginning of year	<hr/> 6,493,977
Cash and cash equivalents, end of year	<hr/> <u>\$ 6,668,416</u>

The accompanying notes are an integral part of these financial statements.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

1 Description of the organization

Pathways Management Group, Inc. (PMG) is a private, nonprofit organization incorporated in the State of California in 2010. PMG's sole member is Persistence and Positivity, Inc., a California nonprofit public benefit corporation. PMG manages secondary charter schools under contracts with Options For Youth charters and other educationally oriented nonprofit organizations (the Managed Organizations). PMG, for a fee under an administrative management agreement with the Managed Organizations, provides, among other services, the education program for independent study based instruction, recruits and manages personnel, provides accounting services, and manages facilities. In addition, PMG provides financing to the Managed Organizations.

2 Summary of significant accounting policies

Basis of accounting

The financial statements of PMG have been prepared on the accrual basis. The significant accounting policies are described below to enhance the usefulness of the financial statements to the reader.

Financial statement presentation

The financial statements are presented in accordance with generally accepted accounting principles for Not-For-Profit Organizations. PMG is required to report information regarding its financial position and activities according to three classifications of net assets: unrestricted net assets, temporarily restricted net assets, and permanently restricted net assets.

Receivables

Accounts receivable and notes receivable are carried at their estimated collectible amounts.

Use of estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the period. Actual results could differ from those estimates.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

2 Summary of significant accounting policies, continued

Revenue recognition

PMG records earned revenues on an accrual basis; investment income is recognized in accordance with policies described below. In addition, PMG records revenue of the following types of contributions when they are received unconditionally, at their fair value: cash, promises to give, certain contributed services and gifts of long-lived assets. Conditional contributions are recognized as revenue when the conditions on which they depend have been substantially met. Contributions are recorded net of uncollectible amounts.

Concentration of credit risk

PMG provides services to Options for Youth charters and Education in Motion (EIM) non-for-profit affiliates that amounted to 100% of management service revenue for the year ended June 30, 2017. PMG performs periodic credit evaluations and generally does not require collateral.

Cash and cash equivalents

PMG considers highly liquid investments purchased with a maturity of three months or less to be cash equivalents. PMG had cash and cash equivalent balances of \$5,144,173 that are not federally insured at June 30, 2017.

Fixed assets

Fixed assets are stated at cost and depreciated or amortized over the useful life of each asset. PMG has adopted a policy to capitalize purchases over \$25,000. Depreciation and amortization are computed using the straight-line method. Repairs and maintenance are charged to expense when incurred.

Income taxes

PMG is exempt from income taxes under Section 501(c)3 of the Internal Revenue Code and similar provisions of the California Revenue and Taxation Code. The United States Federal and State of California have statutes of limitations that generally range from three to four years. No open tax years are currently under examination.

Date of management's review

Management has evaluated subsequent events through March 5, 2018, the date the financial statements were available to be issued.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

3 Functional expenses allocation

The costs of providing the various programs and activities have been summarized in the statement of activities on a functional basis. Accordingly, certain costs have been allocated among program services and support services.

4 Lines of credit receivable from affiliates

PMG granted lines of credit and loans to various non-profit affiliates. Interest is at the lowest published AFR in the month disbursements are made. At June 30, 2017, the following amounts were outstanding:

	Line of credit	Note balance at 6/30/16	Maturity date	Interest rate*
OFY-Burbank	\$2,900,000	\$2,900,000	June 12, 2024	2.58%-3.27%
OFY-San Bernardino	1,000,000	500,000	June 12, 2024	2.24%
OFY-San Gabriel	1,300,000	1,300,000	June 12, 2024	2.82%-3.27%
PIE-IL	1,500,000	400,000	January 15, 2024	2.24%-3.50%
PIE-TN	2,500,000	700,000	September 30, 2023	3.09%-3.56%
PIE-LA	2,500,000	1,350,000	March 27, 2024	2.30%-3.36%
PIE-AZ	1,500,000	1,500,000	February 29, 2026	2.33%
PIE-Nampa	200,000	200,000	February 28, 2027	2.64%
		<u>\$8,850,000</u>		

* The lowest published AFR for long-term debt instruments is used for all balances.

5 Fixed assets

A summary of fixed assets at June 30, 2017 is as follows:

Furniture & fixtures	\$ 354,666
Autos & Trucks	27,684
Leasehold improvements	<u>642,268</u>
	1,024,618
Less accumulated depreciation	<u>652,126</u>
	<u>\$ 372,492</u>

Depreciation expense was \$127,490 for the year ended June 30, 2017.

6 Employee benefit plan

PMG offers a 403(b) matching fund retirement account to all eligible employees. PMG contributes the lesser of 50% of an eligible employee's deferral or 2.5% of salary. Employer contribution expense for the year ended June 30, 2017 was \$95,766.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

7 Transactions with affiliates

PMG provides management and administrative services to Options for Youth charters (OFY), nonprofit affiliates founded by the same founders. These services include school administration, facilities, accounting services, human resources, recruiting, training and curriculum acquisition and development, etc. Total revenue from these affiliates for the year ended June 30, 2017 was \$12,960,881 of which \$4,974,930 was recorded in accounts receivable at June 30, 2017.

PMG also provides management and administrative services to Pathways in Education – Illinois, Inc., Pathways in Education – Tennessee, Inc., Pathways in Education – Louisiana, Inc., Pathways in Education – Arizona, Inc., Pathways in Education, Inc., and Rocky Mountain Pathways, Inc., nonprofit affiliates, founded by the same founders. These services include property management, accounting services, human resources, recruiting, other management and administrative services. Total revenue from these affiliates for the year ended June 30, 2017 was \$3,020,764 of which \$612,135 was recorded in accounts receivable at June 30, 2017.

PMG receives lodging and event services from Pathways in Education – Mendocino (PIE-M) and Rocky Mountain Pathways, Inc. (RMP) nonprofit affiliates founded by the same founders. These services include providing facilities, lodging, and catering for PMG's corporate events and meetings at Blackbird Farm and Rocky Mountain Pathway ranch, which is owned and operated by PIE-M and RMP. For the year ended June 30, 2017, \$8,220 and \$3,795 was paid to PIE-M and RMP, respectively. An additional \$21,013 was owed to RMP at June 30, 2017.

PMG receives computer consulting and network maintenance services from Education Dynamics, Inc. (EDI) and its subsidiary, an affiliate owned by PMG's officers. For the year ended June 30, 2017, \$152,140 was paid to EDI and \$77,240 was owed as of June 30, 2017.

PMG purchases certain events materials, supplies and services from Education Management Systems III (EMS III), an affiliate owned by PMG's officers. For the year ended June 30, 2017, \$303,048 was paid to EMS III and net of \$534,788 was payable to EMS III at June 30, 2017.

PMG receives maintenance/property management services from Lupine Properties, LLC (Lupine), a subsidiary of EMS III. For the year ended June 30, 2017, \$201,646 was recorded in receivable from Lupine for refund.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

7 Transactions with affiliates, continued

PMG receives human resource/staffing services from 9 Dot Education Solutions, LLC (9 Dot), a subsidiary of EMS III. For the year ended June 30, 2017, \$96,649 was paid to 9 Dot and \$133,879 was owed as of June 30, 2017.

8 Lease commitment

PMG entered into an agreement with HP to lease office and parking spaces. The lease agreement expires on February 28, 2022. The minimum annual rental payments under the lease are as follows:

For the year ended June 30:

2018	\$ 193,936
2019	199,754
2020	205,746
2021	211,919
2022	<u>144,077</u>
	<u>\$ 955,432</u>

Total rent expense for the year ended June 30, 2017 was \$267,342.

9 Contingency

In July 2011, PMG received \$5,000,000 of monetary contributions from OFY Upland Charter School. In July 2015, PMG was named as one of the defendants in the lawsuit *California Department of Education et al. v Hawkeye Properties, Inc., et al.* The lawsuit challenges the transfer of assets to the Company in 2011 by OFY Upland Charter School and OFY Mt. Shasta Charter School. According to the complaint, the plaintiffs are seeking to avoid the transfers of approximately \$7,500,000 made by the aforementioned schools to PMG and the other defendants, unspecified punitive damages, and other relief. A trial is scheduled for October 9, 2018. The ultimate outcome of the lawsuit cannot presently be determined. As such, management is not able to make a reasonable estimate of the potential effects, if any, on the financial statements. Accordingly, no provision for a liability that may result has been made in the financial statements. As more information becomes available it is at least reasonably possible that management's view of the outcome will change in the near term.

**PATHWAYS MANAGEMENT
GROUP, INC.**

FINANCIAL STATEMENTS

**For the year ended
June 30, 2018**



**Maginnis
Knechtel & McIntyre LLP**
Certified Public Accountants and Consultants

300 West Colorado Boulevard
Pasadena, CA 91105-1824
(626) 449-3466
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INDEPENDENT AUDITOR'S REPORT

The Board of Directors
Pathways Management Group, Inc.
Pasadena, California

We have audited the accompanying financial statements of Pathways Management Group, Inc., (a California nonprofit benefit corporation), which comprise the statement of financial position as of June 30, 2018, and the related statements of activities and cash flows for the year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Pathways Management Group, Inc., as of June 30, 2018, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Contingency

As discussed in Note 9 to the financial statements, in July 2011, Pathways Management Group, Inc. (PMG) received \$5,000,000 of monetary contributions from OFY Upland Charter School. In July 2015, PMG was named as one of the defendants in the lawsuit *California Department of Education et al. v Hawkeye Properties, Inc., et al.* The lawsuit challenges the transfer of assets to the Company in 2011 by OFY Upland Charter School and OFY Mt. Shasta Charter School. According to the complaint, the plaintiffs are seeking to avoid the transfers of approximately \$7,500,000 made by the aforementioned schools to PMG and the other defendants, unspecified punitive damages, and other relief. A trial is currently pending. The ultimate outcome of the lawsuit cannot presently be determined. As such, management is not able to make a reasonable estimate of the potential effects, if any, on the financial statements. Accordingly, no provision for a liability that may result has been made in the financial statements. As more information becomes available it is at least reasonably possible that management's view of the outcome will change in the near term. Our opinion is not modified with respect to this matter.

Transactions with affiliates

As discussed in Note 7 to the financial statements, the Company is engaged in transactions with various affiliates to provide management and administrative services and obtain other services for the Company's operations. Our opinion is not modified with respect to this matter.

Concentration

As discussed in Note 2 to the financial statements, transactions with affiliates amounted to 100% of management service revenue for the year ended June 30, 2018. The loss of revenue from affiliates could have a material adverse effect on the Organization. Our opinion is not modified with respect to this matter.

A handwritten signature in blue ink that reads "Maginnis Knechtel & McIntyre, LLP". The signature is written in a cursive, flowing style.

Pasadena, California
March 18, 2019

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

STATEMENT OF FINANCIAL POSITION

June 30, 2018

ASSETS

Current assets	
Cash and cash equivalents	\$ 5,050,663
Accounts receivable from affiliates	13,551,765
Prepaid expenses and other assets	<u>488,724</u>
Total current assets	19,091,152
Lines of credit receivable from affiliates	8,850,000
Fixed assets, net	<u>261,470</u>
Total assets	<u><u>\$ 28,202,622</u></u>

LIABILITIES AND NET ASSETS

Current liabilities	
Accounts payable and accrued expenses	\$ 882,047
Payable to affiliates	<u>1,199,491</u>
Total current liabilities	2,081,538
Commitments and contingency (Notes 8 and 9)	
Net assets	
Unrestricted	<u>26,121,084</u>
Total liabilities and net assets	<u><u>\$ 28,202,622</u></u>

The accompanying notes are an integral part of these financial statements.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

STATEMENT OF ACTIVITIES

For the year ended June 30, 2018

Revenues	
Management service revenue	\$ 14,518,895
Contributed services from affiliates	9,010
Interest income	<u>257,555</u>
Total revenues	14,785,460
Expenses	
Program services	9,152,780
Management and general	1,341,018
Bad debt expense	1,157,913
Donation to affiliate	<u>672,857</u>
Total expenses	<u>12,324,568</u>
Change in net assets	2,460,892
Net assets, beginning of year	<u>23,660,192</u>
Net assets, end of year	<u>\$ 26,121,084</u>

The accompanying notes are an integral part of these financial statements.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

STATEMENT OF CASH FLOWS

For the year ended June 30, 2018

Cash flows from operating activities:	
Change in net assets	\$ 2,460,892
Adjustments to reconcile change in net assets to	
Net cash (used) by operating activities	
Depreciation expense	111,022
Bad debt expense	1,157,913
Changes in operating assets and liabilities	
(Increase) in accounts receivable from affiliates	(4,905,361)
Decrease in prepaid expenses and other assets	90,359
Increase in accounts payable and accrued expenses	230,172
Increase in payable to affiliates	50,436
(Decrease) in deferred revenue	<u>(13,186)</u>
Net cash (used) by operating activities	(817,753)
Cash flows from investing activities:	
Collections on loans to affiliates	3,300,000
Loans made to affiliates	<u>(4,100,000)</u>
Net cash (used) by investing activities	<u>(800,000)</u>
Net (decrease) in cash	(1,617,753)
Cash and cash equivalents, beginning of year	<u>6,668,416</u>
Cash and cash equivalents, end of year	<u>\$ 5,050,663</u>

The accompanying notes are an integral part of these financial statements.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

1 Description of the organization

Pathways Management Group, Inc. (PMG) is a private, nonprofit organization incorporated in the State of California in 2010. PMG's sole member is Persistence and Positivity, Inc., a California nonprofit public benefit corporation. PMG manages secondary charter schools under contracts with Options For Youth charters and other educationally oriented nonprofit organizations (the Managed Organizations). PMG, for a fee under an administrative management agreement with the Managed Organizations, provides, among other services, the education program for independent study based instruction, recruits and manages personnel, provides accounting services, and manages facilities. In addition, PMG provides financing to the Managed Organizations.

2 Summary of significant accounting policies

Basis of accounting

The financial statements of PMG have been prepared on the accrual basis. The significant accounting policies are described below to enhance the usefulness of the financial statements to the reader.

Financial statement presentation

The financial statements are presented in accordance with generally accepted accounting principles for Not-For-Profit Organizations. PMG is required to report information regarding its financial position and activities according to three classifications of net assets: unrestricted net assets, temporarily restricted net assets, and permanently restricted net assets.

Receivables

Accounts receivable and notes receivable are carried at their estimated collectible amounts.

Use of estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the period. Actual results could differ from those estimates.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

2 Summary of significant accounting policies, continued

Revenue recognition

PMG records earned revenues on an accrual basis; investment income is recognized in accordance with policies described below. In addition, PMG records revenue of the following types of contributions when they are received unconditionally, at their fair value: cash, promises to give, certain contributed services and gifts of long-lived assets. Conditional contributions are recognized as revenue when the conditions on which they depend have been substantially met. Contributions are recorded net of uncollectible amounts.

Concentration of credit risk

PMG provides services to Options for Youth charter schools and Education in Motion (EIM) non-for-profit affiliates that amounted to 100% of management service revenue for the year ended June 30, 2018. PMG performs periodic credit evaluations and generally does not require collateral.

Cash and cash equivalents

PMG considers highly liquid investments purchased with a maturity of three months or less to be cash equivalents. PMG had cash and cash equivalent balances of \$3,490,320 that are not federally insured at June 30, 2018.

Fixed assets

Fixed assets are stated at cost and depreciated or amortized over the useful life of each asset. PMG has adopted a policy to capitalize purchases over \$25,000. Depreciation and amortization are computed using the straight-line method. Repairs and maintenance are charged to expense when incurred.

Income taxes

PMG is exempt from income taxes under Section 501(c)3 of the Internal Revenue Code and similar provisions of the California Revenue and Taxation Code. The United States Federal and State of California have statutes of limitations that generally range from three to four years. No open tax years are currently under examination.

Date of management's review

Management has evaluated subsequent events through March 18, 2019, the date the financial statements were available to be issued.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

3 Functional expenses allocation

The costs of providing the various programs and activities have been summarized in the statement of activities on a functional basis. Accordingly, certain costs have been allocated among program services and support services.

4 Lines of credit receivable from affiliates

PMG granted lines of credit to various non-profit affiliates. At June 30, 2018, the following amounts were outstanding:

	Line of credit	Note balance at 6/30/18	Maturity date	Interest rate
OFY-Acton	\$4,500,000	\$2,800,000	June 12, 2024	1.25%-1.44%
OFY-San Bernardino	1,000,000	500,000	June 12, 2024	2.24%
OFY-San Gabriel	1,300,000	1,300,000	June 12, 2024	2.82%-3.27%
PIE-IL	1,500,000	200,000	January 15, 2024	2.24%-3.50%
PIE-TN	2,500,000	600,000	September 30, 2023	3.09%-3.56%
PIE-LA	2,500,000	450,000	March 27, 2024	2.30%-3.36%
PIE-AZ	2,500,000	2,300,000	February 29, 2026	0.95%-1.41%
PIE-Nampa	700,000	700,000	February 28, 2027	2.64%
		<u>\$8,850,000</u>		

Interest is at the lowest published AFR for long-term debt instruments or at 50% of the lowest published AFR for long-term debt instruments in the month disbursement is made. At June 30, 2018, interest receivable of \$573,718 was included in accounts receivable from affiliates.

5 Fixed assets

A summary of fixed assets at June 30, 2018 is as follows:

Furniture & fixtures	\$ 354,666
Autos & Trucks	27,684
Leasehold improvements	<u>642,268</u>
	1,024,618
Less accumulated depreciation	<u>763,148</u>
	<u>\$ 261,470</u>

Depreciation expense was \$111,022 for the year ended June 30, 2018.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

6 Employee benefit plan

PMG offers a 403(b) matching fund retirement account to all eligible employees. PMG contributes the lesser of 50% of an eligible employee's deferral or 2.5% of salary. Employer contribution expense for the year ended June 30, 2018 was \$100,839.

7 Transactions with affiliates

PMG provides management and administrative services to Options for Youth charter schools (OFY), nonprofit affiliates founded by the same founders. These services include school administration, facilities, accounting services, human resources, recruiting, training and curriculum acquisition and development, etc. Total revenue from these affiliates for the year ended June 30, 2018 was \$11,165,500 of which \$10,763,385 was recorded in accounts receivable at June 30, 2018.

PMG also provides management and administrative services to Pathways in Education – Illinois, Inc. (PIE-IL), Pathways in Education – Tennessee, Inc. (PIE-TN), Pathways in Education – Louisiana, Inc. (PIE-LA), Pathways in Education – Arizona, Inc. (PIE-AZ), Pathways in Education - Nampa (PIE-Nampa), Pathways in Education, Inc. (PIE, Inc.), and Rocky Mountain Pathways, Inc., nonprofit affiliates, founded by the same founders. These services include property management, accounting services, human resources, recruiting, other management and administrative services. Total revenue from these affiliates for the year ended June 30, 2018 was \$3,353,395 of which \$840,990 was recorded in accounts receivable at June 30, 2018.

PMG receives lodging and event services from Pathways in Education – Mendocino (PIE-M) and Rocky Mountain Pathways, Inc. (RMP) nonprofit affiliates founded by the same founders. These services include providing facilities, lodging, and catering for PMG's corporate events and meetings at Blackbird Farm and Rocky Mountain Pathway ranch, which is owned and operated by PIE-M and RMP. For the year ended June 30, 2018, \$10,101 and \$21,194 was paid to PIE-M and RMP, respectively. An additional \$3,879 and \$6,922 was owed to PIE-M and RMP, respectively, at June 30, 2018 for events.

PMG receives computer consulting and network maintenance services from Education Dynamics, Inc. (EDI) and its subsidiary, an affiliate owned by PMG's officers. For the year ended June 30, 2018, \$262,869 was paid to EDI and \$79,800 was owed as of June 30, 2018.

PMG purchases certain events materials, supplies and services from Education Management Systems III (EMS III), an affiliate owned by PMG's officers. For the year ended June 30, 2018, \$683,229 was paid to EMS III and net of \$52,924 was payable to EMS III at June 30, 2018.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

7 Transactions with affiliates, continued

PMG receives maintenance/property management services from Lupine Properties, LLC (Lupine), a subsidiary of EMS III. For the year ended June 30, 2018, \$55,446 was paid to Lupine. PMG also receives human resource/staffing services from 9 Dot Education Solutions, LLC (9 Dot), a subsidiary of EMS III. For the year ended June 30, 2018, \$176,107 was paid to 9 Dot.

For year ended June 30, 2018, PMG made a cash scholarship donation of \$420,000 to PIE, Inc. for its scholarship program serving charter school students. Additionally, included in payable to affiliates at June 30, 2018 were board approved charter school students' field trips donations of \$104,709, \$117,399, and \$30,749 to PIE-AZ, PIE-Nampa, and PIE-TN, respectively.

8 Lease commitment

PMG entered into an agreement with Hawkeye Properties (HP), a non-profit affiliate founded by the same founder, to lease office and parking spaces. The lease agreement expires on February 28, 2022. The minimum annual rental payments under the lease are as follows:

For the year ended June 30:

2019	\$ 199,754
2020	205,746
2021	211,919
2022	<u>144,077</u>
	<u>\$ 761,496</u>

Total base rent expense for the year ended June 30, 2018 was \$192,372. At June 30, 2018, \$45,049 was owed to HP.

9 Contingency

In July 2011, PMG received \$5,000,000 of monetary contributions from OFY Upland Charter School. In July 2015, PMG was named as one of the defendants in the lawsuit California Department of Education et al. v Hawkeye Properties, Inc., et al. The lawsuit challenges the transfer of assets to the Company in 2011 by OFY Upland Charter School and OFY Mt. Shasta Charter School. According to the complaint, the plaintiffs are seeking to avoid the transfers of approximately \$7,500,000 made by the aforementioned schools to PMG and the other defendants, unspecified punitive damages, and other relief. A trial is currently pending. The ultimate outcome of the lawsuit cannot presently be determined. As such, management is not able to make a reasonable estimate of the potential effects, if any, on the financial statements. Accordingly, no provision for a liability that may result has been made in the financial statements. As more information becomes available it is at least reasonably possible that management's view of the outcome will change in the near term.

**PATHWAYS MANAGEMENT
GROUP, INC.**

FINANCIAL STATEMENTS

**For the year ended
June 30, 2019**

PATHWAYS MANAGEMENT GROUP, INC.
(A California Nonprofit Benefit Corporation)

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INDEPENDENT AUDITOR'S REPORT

The Board of Directors
Pathways Management Group, Inc.
Pasadena, California

We have audited the accompanying financial statements of Pathways Management Group, Inc., (a California nonprofit benefit corporation), which comprise the statement of financial position as of June 30, 2019, and the related statements of activities and cash flows for the year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Pathways Management Group, Inc., as of June 30, 2019, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Legal settlement

As discussed in Note 9 to the financial statements, in July 2011, Pathways Management Group, Inc. (PMG) received \$5,000,000 of monetary contributions from OFY Upland Charter School. In July 2015, PMG was named as one of the defendants in the lawsuit *California Department of Education et al. v Hawkeye Properties, Inc., et al.* The lawsuit challenges the transfer of assets to PMG in 2011 by OFY Upland Charter School and OFY Mt. Shasta Charter School. According to the complaint, the plaintiffs are seeking to avoid the transfers of approximately \$7,500,000 made by the aforementioned schools to PMG and the other defendants, unspecified punitive damages, and other relief. A settlement agreement was finalized in October 2019, which awarded the California Department of Education approximately \$6,500,000. PMG is liable for \$2,943,538, and has funds set aside in an escrow account as restricted cash. Management recorded this loss from legal settlement and accrued expense in the financial statements for the year ended June 30, 2019. Our opinion is not modified with respect to this matter.

Transactions with affiliates

As discussed in Note 7 to the financial statements, the Organization is engaged in transactions with various affiliates to provide management and administrative services and obtain other services for the Organization's operations. Our opinion is not modified with respect to this matter.

Concentration

As discussed in Note 2 to the financial statements, transactions with affiliates amounted to 100% of management service revenue for the year ended June 30, 2019. The loss of revenue from affiliates could have a material adverse effect on the Organization. Our opinion is not modified with respect to this matter.

Subsequent events

As discussed in Note 11 to the financial statements, PMG entered into agreements with related parties to sell PMG's Back Office Services and In-State Education Services and certain related assets as of July 1, 2019. The discontinued operations represent a significant portion of PMG's operations. Our opinion is not modified with respect to this matter.

A handwritten signature in blue ink that reads "Maginnis Knechtel & McIntyre, LLP". The signature is written in a cursive, flowing style.

Pasadena, California
March 9, 2020

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

STATEMENT OF FINANCIAL POSITION

June 30, 2019

ASSETS

Current assets	
Cash and cash equivalents	\$ 4,605,353
Restricted cash	2,943,538
Accounts and interest receivable from affiliates	9,706,590
Prepaid expenses and other assets	<u>278,064</u>
Total current assets	17,533,545
Lines of credit receivable from affiliates	13,549,055
Fixed assets, net	<u>169,546</u>
Total assets	<u><u>\$ 31,252,146</u></u>

LIABILITIES AND NET ASSETS

Current liabilities	
Accounts payable and accrued expenses	\$ 3,853,209
Payable to affiliates	<u>1,723,440</u>
Total current liabilities	5,576,649
Commitments (Notes 8)	
Net assets	
Without donor restriction	<u>25,675,497</u>
Total liabilities and net assets	<u><u>\$ 31,252,146</u></u>

The accompanying notes are an integral part of these financial statements.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

STATEMENT OF ACTIVITIES

For the year ended June 30, 2019

	Without donor restrictions
Revenues	
Management service revenue	\$ 3,839,867
Government program	178,375
Interest income	238,087
Total revenues	4,256,329
Expenses	
Program services	
Education services	4,475,793
Supporting services	
Management and general	44,292
Total expenses	4,520,085
Change in net assets from continuing operations	(263,756)
Discontinued operations (Note 11)	
(Loss) from discontinued operations (including loss from legal settlement of \$2,943,538)	(181,831)
Change in net assets	(445,587)
Net assets, beginning of year	26,121,084
Net assets, end of year	\$ 25,675,497

The accompanying notes are an integral part of these financial statements.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

STATEMENT OF FUNCTIONAL EXPENSES

For the year ended June 30, 2019

	Continuing Operations			Discontinued Operations		
	Program Services	Supporting Services	Total	Program Services	Supporting Services	Total
	Education Services	Management and General		In-State Education and Back Office Services	Management and General	
Personnel costs	\$ 3,097,380	\$ 4,180	\$ 3,101,560	\$ 4,963,528	\$ 204,123	\$ 5,167,651
Student services	6,686	-	6,686	(1,534)	-	(1,534)
Travel	184,670	796	185,466	24,399	115,959	140,358
Materials and equipment	24,861	-	24,861	3,549	77,042	80,591
Rent, utilities and maintenance	48,142	52	48,194	407,016	57,662	464,678
Professional fees	260,223	1,286	261,509	1,874,312	338,472	2,212,784
Depreciation	79,814	3,980	83,794	-	8,130	8,130
Bad debt expense	-	-	-	188,208	-	188,208
Program donation expense	586,085	-	586,085	-	-	-
Office supplies	76,308	-	76,308	240	70,210	70,450
Telephone	12,116	-	12,116	1,108	42,963	44,071
Company events & staff development	41,834	-	41,834	5,852	66,488	72,340
Postage and delivery	6,490	689	7,179	1,899	66,879	68,778
Insurance and taxes	972	-	972	-	83,400	83,400
Services charges	230	-	230	-	91,098	91,098
Dues and subscriptions	1,787	1,700	3,487	200	87,219	87,419
Marketing	12,608	31,569	44,177	2,836	22,140	24,976
Loss from legal settlement	-	-	-	-	2,943,538	2,943,538
Other miscellaneous	35,587	40	35,627	785	29,053	29,838
	<u>\$ 4,475,793</u>	<u>\$ 44,292</u>	<u>\$ 4,520,085</u>	<u>\$ 7,472,398</u>	<u>\$ 4,304,376</u>	<u>\$ 11,776,774</u>

The accompanying notes are an integral part of these financial statements.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

STATEMENT OF CASH FLOWS

For the year ended June 30, 2019

Cash flows from operating activities:	
Change in net assets	\$ (445,587)
Adjustments to reconcile change in net assets to net cash provided by operating activities	
Depreciation expense	91,924
Bad debt expense	188,208
Changes in operating assets and liabilities	
Decrease in accounts and interest receivable from affiliates	3,656,967
Decrease in prepaid expenses and other assets	210,660
Increase in accounts payable and accrued expenses	2,971,162
Increase in payable to affiliates	<u>523,949</u>
Net cash provided by operating activities	7,197,283
Cash flows from investing activities:	
Collections on lines of credit	2,096,331
Loans made to affiliates	<u>(6,795,386)</u>
Net cash (used) by investing activities	<u>(4,699,055)</u>
Net increase in cash and cash equivalents and restricted cash	2,498,228
Cash and cash equivalents and restricted cash, beginning of year	<u>5,050,663</u>
Cash and cash equivalents and restricted cash, end of year	<u><u>\$ 7,548,891</u></u>

The accompanying notes are an integral part of these financial statements.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

1 Description of the organization

Pathways Management Group, Inc. (PMG) is a private, nonprofit organization incorporated in the State of California in 2010. PMG's sole member is Persistence and Positivity, Inc., a California nonprofit public benefit corporation. PMG manages secondary charter schools under contracts with Options For Youth charters and other educationally oriented nonprofit organizations (the Managed Organizations). PMG, for a fee under an administrative management agreement with the Managed Organizations, provides, among other services, the education program for independent study based instruction, recruits and manages personnel, provides accounting services, and manages facilities. In addition, PMG provides financing to the Managed Organizations. During the year ended June 30, 2019, PMG decided to discontinue its Back Office and In-State Education Services as of July 1, 2019. See Note 11 for subsequent event and discontinued operations.

2 Summary of significant accounting policies

Basis of accounting

The financial statements of PMG have been prepared on the accrual basis. The significant accounting policies are described below to enhance the usefulness of the financial statements to the reader.

Financial statement presentation

The financial statements are presented in accordance with generally accepted accounting principles for Not-For-Profit Organizations. PMG is required to report information regarding its financial position and activities according to two classifications of net assets: net assets without donor restrictions and net assets with donor restrictions.

Net assets without donor restrictions include contributions received without any donor-imposed restrictions. All expenses are reported as decreases in net assets without donor restrictions. Revenues, gains and losses on assets are reported as increases or decreases in net assets without donor restrictions unless their use is restricted by donor-imposed stipulations.

Net assets with donor restrictions are classified as such based on donor stipulations that they be used for a specified purpose or timing of use. Net assets with donor restrictions become available once the restriction has been satisfied. Once satisfied, these amounts are reclassified to net assets without donor restrictions and reported in the accompanying financial statements as net assets released from restrictions.

Use of estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the period. Actual results could differ from those estimates.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

2 Summary of significant accounting policies, continued

Revenue recognition

PMG records earned revenues on an accrual basis; investment income is recognized in accordance with policies described below. In addition, PMG records revenue of the following types of contributions when they are received unconditionally, at their fair value: cash, promises to give, certain contributed services and gifts of long-lived assets. Conditional contributions are recognized as revenue when the conditions on which they depend have been substantially met. Contributions are recorded net of uncollectible amounts.

Concentration of credit risk

PMG provided services to Options for Youth charter schools and Education in Motion (EIM) non-for-profit affiliates that amounted to 100% of management service revenue for the year ended June 30, 2019. PMG performs periodic credit evaluations and generally does not require collateral.

Cash and cash equivalents

PMG considers highly liquid investments purchased with a maturity of three months or less to be cash equivalents. PMG maintains funds in financial institutions that, from time-to-time, exceed the Federal Deposit Insurance Corporation insured limits. Management believe that PMG is not exposed to any significant credit risk related to cash and cash equivalents.

Receivables

Accounts receivable and notes receivable are carried at their estimated collectible amounts.

Fixed assets

Fixed assets are stated at cost and depreciated or amortized over the useful life of each asset. PMG has adopted a policy to capitalize purchases over \$25,000. Depreciation and amortization are computed using the straight-line method. Repairs and maintenance are charged to expense when incurred.

Income taxes

PMG is exempt from income taxes under Section 501(c)3 of the Internal Revenue Code and similar provisions of the California Revenue and Taxation Code. As a private foundation under section 509(a) of the Code, PMG is subject to Federal excise taxes on taxable investment income. The United States Federal and State of California have statutes of limitations that generally range from three to four years. No open tax years are currently under examination.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

2 Summary of significant accounting policies, continued

Recent accounting pronouncements and updates

In August 2016, the FASB issued ASU 2016-14, Not-for-Profit Entities (Topic 958): Presentation of Financial Statements of Not-for-Profit Entities, which revises the not-for-profit financial reporting model. ASU 2016-14 provides for additional disclosure requirements and modifies net asset and expense reporting. The Organization adopted the new guidance effective for the year ended June 30, 2019. Implementation of this guidance resulted in a change in presentation of net assets, expenses, and additional disclosures surrounding the Organization's liquidity and availability of financial assets.

In June 2018, the FASB issued ASU 2018-08, Not-for-Profit Entities (Topic 958): Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made. ASU 2018-08 clarifies and improves the scope and accounting guidance for contributions received and made. ASU 2018-08 provides a framework for determining whether a transaction should be accounted for as a contribution or as an exchange transaction. The guidance helps determine whether a contribution is conditional and makes more clear a donor-imposed condition from a donor-imposed restriction. ASU 2018-08 will take effect for fiscal years beginning after December 15, 2018 for resource recipients and for fiscal years beginning after December 15, 2019 for resource providers. Early adoption of ASU 2018-08 is permitted. The Organization is currently evaluating the impact of the pending adoption of ASU 2018-08 on its financial statements.

In February 2016, the FASB issued ASU 2016-02, Lease (Topic 842), which requires organizations who have not elected to early adopt the standard to adopt the new standard effective for fiscal years beginning after December 15, 2020. The Organization is currently evaluating the effect that implementation of the new standard will have on its financial position, results of operations, and cash flows.

Date of management's review

Management has evaluated subsequent events through March 9, 2020, the date the financial statements were available to be issued.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

3 Functional expenses allocation

The costs of providing the various programs and activities have been summarized in the statement of activities on a functional basis. Accordingly, certain costs have been allocated among program services and support services.

Expenses that can be specifically identified with a particular program or supporting service are charged directly to the related program or supporting service. Expenses that are associated with more than one program or supporting services are allocated based on methods determined by management. Accordingly, personnel costs, rent, utilities and maintenance, depreciation, and certain professional fees expenses are allocated based on personnel function, time and effort.

4 Lines of credit receivable from affiliates

PMG granted lines of credit to various non-profit affiliates (borrowers). The borrowers' program fees and revenue are pledged as collateral under the agreements. At June 30, 2019, the following amounts were outstanding:

	Line of credit	Outstanding balance at 6/30/19	Maturity date	Interest rate
OFY-Acton	\$ 10,000,000	\$ 8,995,386	July 25, 2027	1.25%-1.66%
OFY-San Bernardino	1,000,000	500,000	June 12, 2024	1.50%
OFY-San Gabriel	1,300,000	-	June 12, 2024	See below
PIE-IL	1,500,000	-	January 15, 2024	See below
PIE-TN	2,500,000	253,669	September 30, 2023	3.09%-3.56%
PIE-LA	2,500,000	200,000	March 27, 2024	2.30%-3.36%
PIE-AZ	2,500,000	2,500,000	February 28, 2026	0.95%-1.50%
PIE-Nampa	1,200,000	1,100,000	February 28, 2027	2.64%-3.06%
		<u>\$13,549,055</u>		

Interest is at the lowest published AFR for long-term debt instruments or at 50% of the lowest published AFR for long-term debt instruments in the month disbursement is made. At June 30, 2019, interest receivable of \$539,931 was included in accounts receivable from affiliates.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

5 Fixed assets

A summary of fixed assets at June 30, 2019 is as follows:

Furniture & fixtures	\$ 354,666
Autos & Trucks	27,684
Leasehold improvements	<u>642,268</u>
	1,024,618
Less accumulated depreciation	<u>855,072</u>
	<u>\$ 169,546</u>

Depreciation expense was \$91,924 for the year ended June 30, 2019.

6 Employee benefit plan

PMG offers a 403(b) matching fund retirement account to all eligible employees. PMG contributes the lesser of 50% of an eligible employee's deferral or 2.5% of salary. Employer contribution expense for the year ended June 30, 2019 was \$120,938.

7 Transactions with affiliates

PMG provides management and administrative services to Options for Youth charter schools (OFY), nonprofit affiliates founded by the same founders. These services include school administration, facilities, accounting services, human resources, recruiting, training and curriculum acquisition and development, etc. Total revenue from these affiliates for the year ended June 30, 2019 was \$11,594,943 of which \$7,415,416 was recorded in accounts receivable at June 30, 2019.

PMG also provides management and administrative services to Pathways in Education – Illinois, Inc. (PIE-IL), Pathways in Education – Tennessee, Inc. (PIE-TN), Pathways in Education – Louisiana, Inc. (PIE-LA), Pathways in Education – Arizona, Inc. (PIE-AZ), Pathways in Education - Nampa (PIE-Nampa), Pathways in Education, Inc. (PIE, Inc.), and Rocky Mountain Pathways, Inc. (RMP), nonprofit affiliates, founded by the same founders whose children also are officers of these nonprofit affiliates. These services include property management, accounting services, human resources, recruiting, other management and administrative services. Total revenue from these affiliates for the year ended June 30, 2019 was \$3,839,867 of which \$884,476 was recorded in accounts receivable at June 30, 2019.

PMG pays certain expenses and receives reimbursements from Managed Organizations as part of the management services. The cost reimbursements outstanding at year end are included in the accounts receivable from affiliates.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

7 Transactions with affiliates, continued

PMG receives lodging and event services from Pathways in Education – Mendocino (PIE-M) and Rocky Mountain Pathways, Inc. (RMP) nonprofit affiliates founded by the same founders. These services include providing facilities, lodging, and catering for PMG’s corporate events and meetings at Blackbird Farm and Rocky Mountain Pathway ranch, which is owned and operated by PIE-M and RMP. For the year ended June 30, 2019, \$25,546 and \$6,075 was paid to PIE-M and RMP, respectively. An additional \$28,727 and \$10,382 was owed to PIE-M and RMP, respectively, at June 30, 2019 for events.

PMG receives computer consulting and network maintenance services from Education Dynamics, Inc. (EDI) and its subsidiary, an affiliate owned by PMG’s officers. For the year ended June 30, 2019, \$257,239 was paid to EDI and \$128,230 was owed at year-end.

PMG purchases certain events materials, supplies and services from Education Management Systems III (EMS III), an affiliate owned by PMG’s officers. For the year ended June 30, 2019, \$241,820 was paid to EMS III and \$218,303 was payable to EMS III at June 30, 2019.

PMG receives maintenance/property management services from Lupine Properties, LLC (Lupine), a subsidiary of EMS III. For the year ended June 30, 2019, \$26,249 was paid to Lupine, and \$29,528 was owed at year-end. PMG also receives human resource/staffing services from 9 Dot Education Solutions, LLC (9 Dot), a subsidiary of EMS III. For the year ended June 30, 2019, \$306,557 was paid to 9 Dot and \$520,032 was owed at year-end.

For year ended June 30, 2019, PMG made a cash scholarship donation of \$420,000 to PIE, Inc. for its scholarship program serving charter school students. Additionally, included in donation expenses for year ended June 30, 2019 were board approved charter school students’ field trips donations of \$42,357, \$83,103, and \$40,625 to PIE-AZ, PIE-Nampa, and PIE-TN, respectively. At June 30, 2019, \$41,134 was outstanding in payable to PIE-Nampa.

8 Lease commitment

PMG entered into an agreement with Hawkeye Properties (HP), a non-profit affiliate founded by the same founder, to lease office and parking spaces. The lease agreement expires on February 28, 2022. The minimum annual rental payments under the lease are as follows:

For the year ended June 30:

2020	\$ 205,746
2021	211,919
2022	<u>144,077</u>
	<u>\$ 561,742</u>

Total base rent expense for the year ended June 30, 2019 was \$288,864. At June 30, 2019, \$28,589 was owed to HP.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

9 Legal settlement

In July 2011, PMG received \$5,000,000 of monetary contributions from OFY Upland Charter School. In July 2015, PMG was named as one of the defendants in the lawsuit *California Department of Education et al. v Hawkeye Properties, Inc., et al.* The lawsuit challenges the transfer of assets to PMG in 2011 by OFY Upland Charter School and OFY Mt. Shasta Charter School. According to the complaint, the plaintiffs are seeking to avoid the transfers of approximately \$7,500,000 made by the aforementioned schools to PMG and the other defendants, unspecified punitive damages, and other relief. A settlement agreement was finalized in October 2019, which awarded the California Department of Education approximately \$6,500,000. PMG is liable for \$2,943,538, and has funds set aside in an escrow account as restricted cash. Management recorded this loss from legal settlement and accrued expense in the financial statements for the year ended June 30, 2019.

10 Liquidity and availability

PMG has \$13,825,706 of financial assets available within one year of the balance sheet date to meet cash needs for general expenditures consisting of cash and cash equivalents of \$4,605,353, and accounts receivable of \$9,220,353. Receivables are expected to be collected within one year. PMG also set aside restricted cash in escrow account which will be used to pay off the legal settlement liability of \$2,943,538.

As part of PMG's liquidity management, it has a policy to structure its financial assets to be available as its general expenditures, liabilities, and other obligations come due. Excess cash is generally held in savings or money market accounts until it is required for operational use.

11 Subsequent events

Management has evaluated events or transactions for potential recognition or disclosure in the financial statements through March 9, 2020, which is the date the financial statements were available to be issued.

Discontinued operations

During the year-ended June 30, 2019, PMG's Board of Directors (the Board) determined to cease providing the Back Office Services and In-State Education Services (the Services) to California charter schools. PMG would continue to provide Educational Services to non-California charter schools.

PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)

NOTES TO FINANCIAL STATEMENTS

11 Subsequent events, continued

Discontinued operations, continued

The Board resolved to seek buyers for each of the Services. Subsequently, PMG and a related party 9 Dot entered into a purchase agreement that 9 Dot shall purchase the Back Office Services and certain related assets as of July 1, 2019 with a purchase price at \$1,343,000. 9 Dot would make a cash payment of \$134,000 and finance the remainder of \$1,208,700 with a four-year secured promissory note at annual interest of 5.25%. Substantially all assets including inventory, account receivables, and other securities and property owned by 9 Dot are pledged as collateral under the agreement and outstanding balances are also guaranteed by an officer of PMG who is also an owner of 9 Dot.

PMG and Skyrocket, Inc. (Skyrocket), a California corporation, whose owners include PMG's officers, also entered into a purchase agreement that Skyrocket shall purchase the In-State Education Services and certain related assets as of July 1, 2019 with a purchase price at \$2,103,000. Skyrocket would make a cash payment of \$210,300 and finance the remainder of \$1,892,700 with a four-year loan at annual interest of 5.25%. Substantially all assets including inventory, account receivables, and other securities and property owned by Skyrocket are pledged as collateral under the agreement and outstanding balances are also guaranteed by an officer of PMG who is also an owner of Skyrocket.

Following are the details of the assets held for sale in the statement of financial position as of June 30, 2019:

Fixed assets	
Furniture and equipment	\$ 220,819
Accumulated depreciation	<u>(220,497)</u>
Fixed assets, net	322
Prepaid expenses	<u>3,750</u>
Total assets held for sale	<u>\$ 4,072</u>

The net loss from discontinued operations presented in the statement of activities for the year-ended June 30, 2019 consists of the following:

Revenues	\$ 11,594,943
Expenses	<u>(11,776,774)</u>
Net loss from discontinued operations	<u>\$ (181,831)</u>

The total operating cash flows of the discontinued operations for the year-ended June 30, 2019 was cash used by operating activities of \$177,451.

**PATHWAYS MANAGEMENT GROUP, INC.
(A CALIFORNIA NONPROFIT BENEFIT CORPORATION)**

NOTES TO FINANCIAL STATEMENTS

11 Subsequent events, continued

Other event

In March 2020, the World Health Organization declared a global pandemic in response to an outbreak of a novel coronavirus (COVID-19). The full extent to which the coronavirus may impact PMG's results of operations, liquidity or financial position is uncertain. Management continues to monitor the impact that the COVID-19 pandemic is having on PMG and the industry in which the Company operates. However, given the speed and frequency of continuously evolving developments with respect to this pandemic, PMG cannot reasonably estimate the magnitude of the impact to its results of operations, and, if the outbreak continues on its current trajectory, such impacts could grow and become material to its liquidity or financial position.

Appendix A4.4 – IRS Form 990

Pathways In Education – North Carolina

Return of Organization Exempt From Income Tax

2018

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 2018 calendar year, or tax year beginning 07/01, 2018, and ending 06/30, 2019

Form sections B through K: B Check if applicable; C Name of organization PATHWAYS MANAGEMENT GROUP INC; D Employer identification number 27-3946421; E Telephone number (626) 683-3500; F Name and address of principal officer: JOHN HALL, PRESIDENT; G Gross receipts \$ 4,075,962; H(a) Is this a group return for subsidiaries? Yes No; H(b) Are all subsidiaries included? Yes No; I Tax-exempt status: X 501(c)(3); J Website: NONE; K Form of organization: X Corporation; L Year of formation: 2010; M State of legal domicile: CA

Part I Summary

Table with 3 columns: Line number, Description, and Amount. Rows include: 1 Briefly describe the organization's mission or most significant activities: MANAGEMENT OF CHARTER SCHOOLS; 2-7 Governance and Activities; 8-12 Revenue; 13-19 Expenses; 20-22 Net Assets or Fund Balances.

Part II Signature Block

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

Signature and Preparer sections: Sign Here (Signature of officer JOHN HALL, Date 07/13/2020); Paid Preparer Use Only (Preparer LINDA E G BALLESTEROS, Date 07/13/2020, Firm MAGINNIS KNECHTEL & MCINTYRE LLP).

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

For Paperwork Reduction Act Notice, see the separate instructions.

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:

MANAGEMENT OF CHARTER SCHOOLS

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? [X] 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 \$ 4,002,235. including grants of \$) (Revenue \$ 3,839,867.)

MANAGEMENT AND ADMINISTRATIVE SERVICES TO SECONDARY CHARTER SCHOOLS AND EDUCATIONALLY ORIENTED NONPROFIT ORGANIZATIONS INCLUDING, AMONG OTHER SERVICES, THE EDUCATION PROGRAM FOR INDEPENDENT STUDY BASED ON INSTRUCTION, RECRUITS AND MANAGES PERSONNEL, PROVIDES ACCOUNTING SERVICES, AND MANAGES FACILITIES.

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$ 239,551.)

PROGRAM FINANCING TO MANAGED ORGANIZATIONS

4c (Code:) (Expenses \$ 473,558. including grants of \$) (Revenue \$ 178,375.)

PROGRAM ACTIVITIES FROM THE WORKFORCE INNOVATION AND OPPORTUNITY ACT

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

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

4e Total program service expenses 4,475,793.

Part IV Checklist of Required Schedules

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

Part IV Checklist of Required Schedules (continued)

Table with 3 columns: Question, Yes, No. Rows 22-38 covering various IRS schedule requirements.

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 3 columns: Question, Yes, No. Rows 1a-1c regarding Form 1096 and backup withholding rules.

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

		Yes	No
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 135		
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).	X	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
b	If "Yes," has it filed a Form 990-T for this year? <i>If "No" to line 3b, provide an explanation in Schedule O</i>		
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)?		X
b	If "Yes," enter the name of the foreign country: See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		
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?		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7	Organizations that may receive deductible contributions under section 170(c).		
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		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?		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		
9	Sponsoring organizations maintaining donor advised funds.		
a	Did the sponsoring organization make any taxable distributions under section 4966?		
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		
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?		
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? 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?		X
b	If "Yes," has it filed a Form 720 to report these payments? <i>If "No," provide an explanation in Schedule O</i>		
15	Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see instructions and file Form 4720, Schedule N.		X
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.		X

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

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

Section A. Governing Body and Management

Table with 3 columns: Question, Yes, No. Rows include 1a (voting members), 1b (independent members), 2-7a (governing body relationships and structure), 7b (governance decisions), 8 (meeting documentation), and 9 (officer reachability).

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

Table with 3 columns: Question, Yes, No. Rows include 10a (local chapters), 10b (written policies), 11a (Form 990 distribution), 12a-c (conflict of interest policy), 13 (whistleblower policy), 14 (document retention), and 15a-b (compensation review).

Section C. Disclosure

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

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) ELISIA CHOI BOARD MEMBER	4.00 0.	X					0.	0.	0.	
(2) MARY JENSEN BOARD MEMBER	4.00 0.	X					0.	0.	0.	
(3) DR. STUART GOTHOLD BOARD MEMBER	4.00 0.	X					0.	0.	0.	
(4) JOHN HALL PRESIDENT	1.00 5.00			X			0.	0.	0.	
(5) JOAN HALL VICE PRESIDENT	1.00 5.00			X			0.	0.	0.	
(6) JAMIE DONAHUE SECRETARY	1.00 5.00			X			0.	0.	0.	
(7) JOHN HALL, JR. TREASURER	1.00 5.00			X			0.	0.	0.	
(8) JESSICA G RAY CHIEF ACADEMIC OFFICER	25.00 0.			X			209,386.	0.	9,376.	
(9) ELIZABETH BASKERVILLE CHIEF FINANCIAL OFFICER	25.00 0.			X			92,773.	0.	1,659.	
(10) TOMMIE JOE CHIEF OPERATING OFFICER	25.00 0.			X			122,875.	0.	2,666.	
(11) ROBERT VARTANIAN CHIEF INFORMATION OFFICER	25.00 0.			X			87,777.	0.	2,136.	
(12) PEDRO CANO CHIEF BUS. DEVELOPMENT OFFICER	25.00 0.			X			74,236.	0.	752.	
(13) VREJ BOGHOKIAN SENIOR DIRECTOR OF OPERATIONS	25.00 0.					X	145,659.	0.	8,451.	
(14) MARTIN MCGREAL CLUSTER DIRECTOR - PIE	25.00 0.					X	126,705.	0.	20,772.	

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

Table with 7 main columns: (A) Name and title, (B) Average hours per week, (C) Position, (D) Reportable compensation from the organization, (E) Reportable compensation from related organizations, (F) Estimated amount of other compensation. Rows include KRISTI DUENAS, MARICELA FRYMARK, and GREGORY MARRERO.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization 7

Table with 3 columns: Question number, Yes, No. Contains questions 3, 4, and 5 regarding compensation reporting.

Section B. Independent Contractors

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

Table with 3 columns: (A) Name and business address, (B) Description of services, (C) Compensation.

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization 0.

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					
	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 ▶			0.			
Program Service Revenue			Business Code				
	2a MANAGEMENT SERVICES		611710	3,839,867.	3,839,867.		
	b PROGRAM FINANCING		611710	239,551.	239,551.		
	c GOVERNMENT PROGRAM		611710	178,375.	178,375.		
	d _____						
	e _____						
	f All other program service revenue						
g Total. Add lines 2a-2f ▶			4,257,793.				
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.			
		(i) Real	(ii) Personal				
	6a Gross rents						
	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 LOSS FROM DISCONTINUED OPERATIONS		611710	-181,831.	-181,831.			
b _____							
c _____							
d All other revenue							
e Total. Add lines 11a-11d ▶			-181,831.				
12 Total revenue. See instructions. ▶			4,075,962.	4,075,962.			

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

Table with 5 columns: (A) Total expenses, (B) Program service expenses, (C) Management and general expenses, (D) Fundraising expenses. Rows include categories like Grants, Salaries, Pension, Advertising, etc.

Part X Balance Sheet

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

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	3,519,352.	1	7,548,891.
	2 Savings and temporary cash investments	1,531,311.	2	0.
	3 Pledges and grants receivable, net	0.	3	0.
	4 Accounts receivable, net	13,551,765.	4	9,706,590.
	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	8,850,000.	7	13,549,055.
	8 Inventories for sale or use	0.	8	0.
	9 Prepaid expenses and deferred charges	465,808.	9	254,501.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 1,024,618.		
	b Less: accumulated depreciation	10b 855,072.	261,470.	10c 169,546.
	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	22,916.	15	23,563.
16 Total assets. Add lines 1 through 15 (must equal line 34)	28,202,622.	16	31,252,146.	
Liabilities	17 Accounts payable and accrued expenses	2,081,538.	17	5,576,649.
	18 Grants payable	0.	18	0.
	19 Deferred revenue	0.	19	0.
	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	0.	25	0.
	26 Total liabilities. Add lines 17 through 25	2,081,538.	26	5,576,649.
Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> X and complete lines 27 through 29, and lines 33 and 34.			
	27 Unrestricted net assets	26,121,084.	27	25,675,497.
	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	26,121,084.	33	25,675,497.
34 Total liabilities and net assets/fund balances	28,202,622.	34	31,252,146.	

Part XI Reconciliation of Net Assets

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

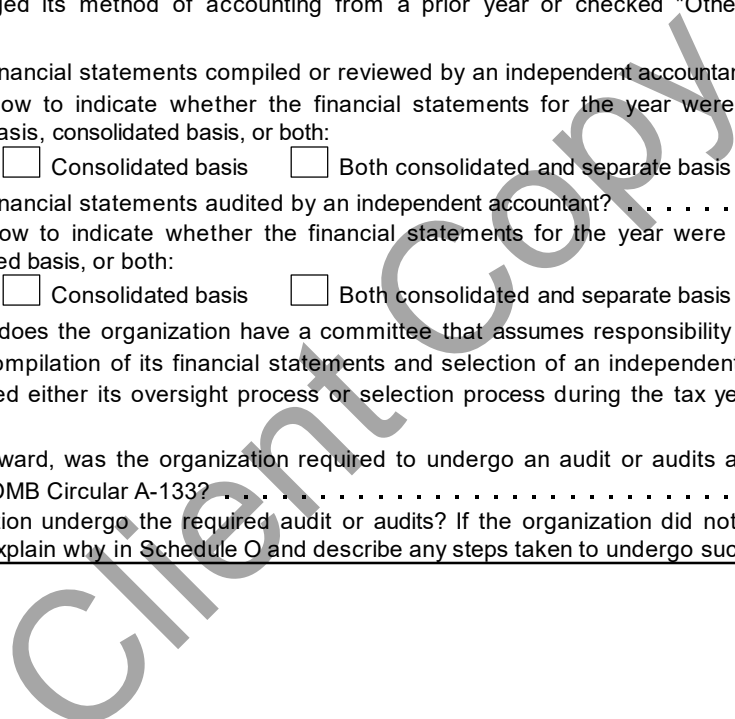
1	Total revenue (must equal Part VIII, column (A), line 12)	1	4,075,962.
2	Total expenses (must equal Part IX, column (A), line 25)	2	4,520,085.
3	Revenue less expenses. Subtract line 2 from line 1	3	-444,123.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	26,121,084.
5	Net unrealized gains (losses) on investments	5	-1,464.
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	25,675,497.

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

2018

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

PATHWAYS MANAGEMENT GROUP INC

Employer identification number

27-3946421

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		
ATTACHMENT 1						
(A)						
(B)						
(C)						
(D)						
(E)						
Total					14,437,642.	13,549,055.

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

Schedule A (Form 990 or 990-EZ) 2018

JSA
8E1210 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) 2014, (b) 2015, (c) 2016, (d) 2017, (e) 2018, (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) 2014, (b) 2015, (c) 2016, (d) 2017, (e) 2018, (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 2018; 15 Public support percentage from 2017 Schedule A, Part II, line 14; 16a 33 1/3% support test - 2018; 16b 33 1/3% support test - 2017; 17a 10%-facts-and-circumstances test - 2018; 17b 10%-facts-and-circumstances test - 2017; 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) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(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) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(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 2018 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2017 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2018 (line 10c, column (f), divided by line 13, column (f)),	17	%
18 Investment income percentage from 2017 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2018. 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 - 2017. 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>		X
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>		X
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>		X
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>		X
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>		X
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>		X
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as 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>		X
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>		X
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>		X
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>		X
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>		X
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>		X
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?		X
b	A family member of a person described in (a) above?		X
c	A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI .		X

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? 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.		
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? 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.		

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)? 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).		

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?	X	
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? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).	X	
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? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.	X	

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 checked="" 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.		
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? 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.	X	
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? 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.	X	
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? Provide details in Part VI .		
b	Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.		

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

1 Check here if the organization satisfied the Integral Part Test as a qualifying trust on 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 2018 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-2018	(iii) Distributable Amount for 2018
1 Distributable amount for 2018 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2018 (reasonable cause required - explain in Part VI). See instructions.			
3 Excess distributions carryover, if any, to 2018			
a From 2013			
b From 2014			
c From 2015			
d From 2016			
e From 2017			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2018 distributable amount			
i Carryover from 2013 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2018 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2018 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4.			
5 Remaining underdistributions for years prior to 2018, 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 2018. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.			
7 Excess distributions carryover to 2019. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2014			
b Excess from 2015			
c Excess from 2016			
d Excess from 2017			
e Excess from 2018			

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.)

SECTION A LINE 1

SUPPORTED ORGANIZATIONS ARE NONPROFIT CHARTER SCHOOLS IDENTIFIED BY CLASS AND PURPOSE IN THE ORGANIZATION'S ARTICLES OF INCORPORATION. THE TYPES OF SERVICES PROVIDED INCLUDE SERVICES THAT WOULD HAVE TO BE PERFORMED BY THE CHARTER SCHOOLS IF THEY WERE NOT PERFORMED BY THE SUPPORTING ORGANIZATION. THROUGH THE USE OF THE SUPPORTING ORGANIZATION, SERVICES ARE CENTRALIZED AND PROVIDE ECONOMIES OF SCALE AS HAS BEEN THE HISTORIC MODE OF OPERATION AND MODEL OF SUCCESS OF NONPROFIT CHARTER SCHOOL EDUCATION.

SECTION D LINE 3

THROUGH REPRESENTATION AT REGULARLY AND CONTINUOUSLY HELD MANAGEMENT, PLANNING, AND BOARD MEETINGS AND PURSUANT TO WRITTEN AGREEMENT, SUPPORTED ORGANIZATIONS RETAIN OVERSIGHT BY REQUIRING THE SUPPORTING ORGANIZATION TO PROVIDE TO THE GOVERNING BOARDS INFORMATION SUFFICIENT TO ENABLE THE SUPPORTED ORGANIZATIONS TO MONITOR THE SUFFICIENCY OF SERVICES PROVIDED.

SECTION E LINE 2

THE ORGANIZATION PROVIDES ESSENTIAL SERVICES TO EDUCATIONAL ORGANIZATIONS ALLOWING THEM TO CARRY OUT AND FURTHER THEIR EXEMPT EDUCATIONAL PURPOSE. THESE ACTIVITIES ARE REGULARLY MONITORED BY MANAGEMENT AND THE GOVERNING BODY. SEE SECTION D FOR RESPONSIVENESS.

ATTACHMENT 1

SCHEDULE A, PART I - INFORMATION ABOUT SUPPORTED ORGANIZATIONS

(I) NAME OF SUPPORTED ORGANIZATION	(II) EIN	(III) TYPE OF ORGANIZATION	(IV) YES NO	(V) AMOUNT OF SUPPORT	(VI) OTHER SUPPORT AMOUNT
OPTIONS FOR YOUTH - VICTOR VALLEY, INC.	95-4204496	2		1,930,622.	0.

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.)

ATTACHMENT 1 (CONT'D)

SCHEDULE A, PART I - INFORMATION ABOUT SUPPORTED ORGANIZATIONS

(I) NAME OF SUPPORTED ORGANIZATION	(II) EIN	(III) TYPE OF ORGANIZATION	(IV) YES NO	(V) AMOUNT OF SUPPORT	(VI) OTHER SUPPORT AMOUNT
OPTIONS FOR YOUTH - SAN JUAN, INC.	26-0564837	2		1,994,562.	0.
OPTIONS FOR YOUTH - SAN GABRIEL, INC.	95-4602181	2		1,696,339.	0.
OPTIONS FOR YOUTH - SAN BERNARDINO, INC.	27-1001410	2		1,941,259.	500,000.
PATHWAYS IN EDUCATION - LOUISIANA INC.	26-3243066	2		492,887.	200,000.
PATHWAYS IN EDUCATION - ARIZONA INC.	26-3243066	2		145,442.	2,500,000.
PATHWAYS IN EDUCATION - ILLINOIS	20-3681896	2		1,507,367.	0.
PATHWAYS IN EDUCATION - TENNESSEE	46-3518817	2		511,187.	253,669.
OPTIONS FOR YOUTH - ACTON, INC.	82-2272612	2		4,032,162.	8,995,386.
PATHWAYS IN EDUCATION - NAMPA	81-4963154	2		185,815.	1,100,000.
TOTAL AMOUNT OF SUPPORT				<u>14,437,642.</u>	<u>13,549,055.</u>

Client Copy

SCHEDULE D (Form 990)

Supplemental Financial Statements

OMB No. 1545-0047

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.

2018

Attach to Form 990.

Open to Public Inspection

Department of the Treasury Internal Revenue Service

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

Name of the organization

Employer identification number

PATHWAYS MANAGEMENT GROUP INC

27-3946421

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 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include total number at end of year, aggregate values, and yes/no questions about donor advisement.

Part II Conservation Easements.

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

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include purpose of easements, total number, acreage, and monitoring expenses.

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 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include reporting requirements for art and historical treasures.

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

Schedule D (Form 990) 2018

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		642,268.	483,796.	158,472.
d Equipment		27,684.	16,610.	11,074.
e Other		354,666.	354,666.	
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				169,546.

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)	
(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 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	4,074,498.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a		-1,464.
b	Donated services and use of facilities	2b		
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII.)	2d		
e	Add lines 2a through 2d		2e	-1,464.
3	Subtract line 2e from line 1		3	4,075,962.
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		
c	Add lines 4a and 4b		4c	
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)		5	4,075,962.

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	4,520,085.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
a	Donated services and use of facilities	2a		
b	Prior year adjustments	2b		
c	Other losses	2c		
d	Other (Describe in Part XIII.)	2d		
e	Add lines 2a through 2d		2e	
3	Subtract line 2e from line 1		3	4,520,085.
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		
c	Add lines 4a and 4b		4c	
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)		5	4,520,085.

Part XIII Supplemental Information.

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

SCHEDULE D PART X LINE 2

THE ORGANIZATION IS EXEMPT FROM INCOME TAXES UNDER SECTION 501(C)3 OF THE
 INTERNAL REVENUE CODE AND SIMILAR PROVISIONS OF THE CALIFORNIA REVENUE
 AND TAXATION CODE. THE UNITED STATES FEDERAL AND STATE OF CALIFORNIA HAVE
 STATUTES OF LIMITATIONS THAT GENERALLY RANGE FROM THREE TO FOUR YEARS. NO
 OPEN TAX YEARS ARE CURRENTLY UNDER EXAMINATION

Part XIII Supplemental Information *(continued)*

Client Copy

**SCHEDULE I
(Form 990)**

**Grants and Other Assistance to Organizations,
Governments, and Individuals in the United States**

OMB No. 1545-0047

2018

**Open to Public
Inspection**

Department of the Treasury
Internal Revenue Service

Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

▶ Attach to Form 990.

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

Name of the organization

PATHWAYS MANAGEMENT GROUP INC

Employer identification number

27-3946421

Part I General Information on Grants and Assistance

- Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? Yes No
- Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1) PATHWAYS IN EDUCATION, INC. 320 NORTH HALSTEAD STE 210	02-0541020	501(C)(3)	586,085.				SCHOLARSHIP PROGRAM
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ▶ 4.

3 Enter total number of other organizations listed in the line 1 table ▶

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

Schedule I (Form 990) (2018)

Part III Grants and Other Assistance to Domestic Individuals. Complete if the organization answered "Yes" on Form 990, Part IV, line 22.
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
1					
2					
3					
4					
5					
6					
7					

Part IV Supplemental Information. Provide the information required in Part I, line 2, Part III, column (b); and any other additional information.

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**SCHEDULE J
(Form 990)**

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

- ▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.
- ▶ Attach to Form 990.
- ▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2018

**Open to Public
Inspection**

Name of the organization

PATHWAYS MANAGEMENT GROUP INC

Employer identification number

27-3946421

Part I Questions Regarding Compensation

1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- | | |
|--|--|
| <input type="checkbox"/> First-class or charter travel | <input type="checkbox"/> Housing allowance or residence for personal use |
| <input type="checkbox"/> Travel for companions | <input type="checkbox"/> Payments for business use of personal residence |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees |
| <input type="checkbox"/> Discretionary spending account | <input type="checkbox"/> Personal services (such as maid, chauffeur, chef) |

b If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?

3 Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- | | |
|--|---|
| <input type="checkbox"/> Compensation committee | <input type="checkbox"/> Written employment contract |
| <input type="checkbox"/> Independent compensation consultant | <input checked="" type="checkbox"/> Compensation survey or study |
| <input type="checkbox"/> Form 990 of other organizations | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

4 During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment?
 - b** Participate in, or receive payment from, a supplemental nonqualified retirement plan?
 - c** Participate in, or receive payment from, an equity-based compensation arrangement?
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.

5 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization?
 - b** Any related organization?
- If "Yes" on line 5a or 5b, describe in Part III.

6 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization?
 - b** Any related organization?
- If "Yes" on line 6a or 6b, describe in Part III.

7 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III.

8 Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III.

9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

	Yes	No
1a		
1b		
2		
3		
4a		X
4b		X
4c		X
5a		X
5b		X
6a		X
6b		X
7		X
8		X
9		

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

Schedule J (Form 990) 2018

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

Note: The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1 VREJ BOGHOKIAN SENIOR DIRECTOR OF OPERATIONS	(i)	145,659.	0.	0.	3,680.	4,771.	154,110.	
	(ii)	0.	0.	0.				
2 JESSICA G RAY CHIEF ACADEMIC OFFICER	(i)	209,386.	0.	0.	3,262.	6,114.	218,762.	
	(ii)	0.	0.	0.				
3 KRISTI DUENAS SENIOR DIRECTOR OF ACADEMICS	(i)	148,166.	0.	0.	2,329.	15,517.	166,012.	
	(ii)	0.	0.	0.				
4 MARICELA FRYMARK DIRECTOR OF INSTRUCTION	(i)	139,379.	0.	0.	3,690.	10,211.	153,280.	
	(ii)	0.	0.	0.				
5	(i)							
	(ii)							
6	(i)							
	(ii)							
7	(i)							
	(ii)							
8	(i)							
	(ii)							
9	(i)							
	(ii)							
10	(i)							
	(ii)							
11	(i)							
	(ii)							
12	(i)							
	(ii)							
13	(i)							
	(ii)							
14	(i)							
	(ii)							
15	(i)							
	(ii)							
16	(i)							
	(ii)							

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

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SCHEDULE L
(Form 990 or 990-EZ)

Transactions With Interested Persons

OMB No. 1545-0047

2018

Open To Public Inspection

Department of the Treasury
Internal Revenue Service

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.**

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

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

Name of the organization PATHWAYS MANAGEMENT GROUP INC	Employer identification number 27-3946421
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Part I Excess Benefit Transactions (section 501(c)(3), section 501(c)(4), and 501(c)(29) organizations only).
Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

1	(a) Name of disqualified person	(b) Relationship between disqualified person and organization	(c) Description of transaction	(d) Corrected?	
				Yes	No
(1)					
(2)					
(3)					
(4)					
(5)					
(6)					

2 Enter the amount of tax incurred by the organization managers or disqualified persons during the year under section 4958 ▶ \$ _____

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization, ▶ \$ _____

Part II Loans to and/or From Interested Persons.
Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a or Form 990, Part IV, line 26; or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22.

1	(a) Name of interested person	(b) Relationship with organization	(c) Purpose of loan	(d) Loan to or from the organization?		(e) Original principal amount	(f) Balance due	(g) In default?		(h) Approved by board or committee?		(i) Written agreement?	
				To	From			Yes	No	Yes	No	Yes	No
				(1)									
(2)													
(3)													
(4)													
(5)													
(6)													
(7)													
(8)													
(9)													
(10)													
Total ▶							\$						

Part III Grants or Assistance Benefiting Interested Persons.
Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

1	(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of assistance	(d) Type of assistance	(e) Purpose of assistance
(1)					
(2)					
(3)					
(4)					
(5)					
(6)					
(7)					
(8)					
(9)					
(10)					

Part IV Business Transactions Involving Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
(1) EDUCATION MANAGMENT SERVICES III	SCHEDULE O	241,820.	EVENTS SUPPLIES AND SERVICE		X
(2) EDUCATION DYNAMICS INC	SCHEDULE O	257,239.	COMPUTER & NETWORK SERVICES		X
(3) LUPINE PROPERTIES LLC	SCHEDULE O	26,249.	MAINTENANCE & PROPERTY MGMT		X
(4) 9 DOT EDUCATION SOLUTIONS LLC	SCHEDULE O	306,557.	HUMAN RESOURCE/STAFFING SVCS		X
(5) EAGLE EYE TITLE HOLDING CORPORATION	501(C)(2) AFFILIATE	332,952.	OCCUPANCY		X
(6) FARM STAY INN LLC	SCHEDULE O	17,803.	OCCUPANCY		X
(7) EDUCATION MANAGMENT SERVICES INC	SCHEDULE O	154,227.	PURCHASE		X
(8)					
(9)					
(10)					

Part V Supplemental Information

Provide additional information for responses to questions on Schedule L (see instructions).

PART IV BUSINESS TRANSACTIONS INVOLVING INTERESTED PERSONS

SCHEDULE L PART IV

PMG RECEIVES COMPUTER CONSULTING AND NETWORK MAINTENANCE SERVICES FROM EDUCATION DYNAMICS, INC. AND ITS SUBSIDIARY; PURCHASES CERTAIN EVENTS MATERIALS, SUPPLIES AND SERVICES FROM EDUCATION MANAGMENT SYSTEMS III, INC (EMS III); RECEIVES MAINTENANCE/PROPERTY MANAGMENT SERVICES FROM LUPINE PROPERTIES, LLC, A SUBSIDIARY OF EMS III; AND RECEIVES HUMAN RESOURCE/STAFFING SERVICES FROM 9 DOT EDUCATION SOLUTIONS, LLC, A SUBSIDIARY OF EMS III; RECEIVES PROPERTY MANAGEMENT SERVICES FROM EAGLE EYE TITLE HOLDING CORPORATION, A SUBSIDIARY OF HAWKEYE PROPERTIES INC; RECEIVES LODGING AND EVENT SERVICES FROM FARM STAY INN, LLC, A SUBSIDIARY OF PATHWAYS IN EDUCATION - MENDOCINO, INC; PURCHASES VARIOUS SUPPLIES FROM EDUCATION MANAGEMENT SYSTEMS, INC.

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

Supplemental Information to Form 990 or 990-EZ

OMB No. 1545-0047

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

2018

**Open to Public
Inspection**

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 990 or 990-EZ.

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

Name of the organization

PATHWAYS MANAGEMENT GROUP INC

Employer identification number

27-3946421

FAMILY OR BUSINESS RELATIONSHIPS

990 PART VI, LINE 2

FAMILY AND BUSINESS RELATIONSHIPS:

JOHN HALL, PRESIDENT

JOAN HALL, VICE PRESIDENT

JOHN HALL, JR, TREASURER

JAMIE DONAHUE, SECRETARY

DOCUMENTATION OF MEETINGS

990 PART VI, LINE 8B

THE ORGANIZATION HAD NO COMMITTEES WITH AUTHORITY TO ACT ON BEHALF OF THE
GOVERNING BODY.

FORM 990 REVIEW

990 PART VI, LINE 11

THE ORGANIZATION'S FORM 990 IS PREPARED BY TAX PROFESSIONALS AND
FORWARDED TO MANAGEMENT. MANAGEMENT REVIEWS AND SENDS QUESTIONS AND
COMMENTS BACK TO THE TAX PREPARER FOR DISCUSSION AND CLARIFICATION. AFTER
ANY NEEDED REVISIONS ARE MADE, THE FINAL FORM 990 IS DISTRIBUTED TO THE
DIRECTORS. EACH DIRECTOR THEN GIVES WRITTEN CONSENT APPROVING THE TAX
RETURN PRIOR TO FILING.

CONFLICT OF INTEREST POLICY COMPLIANCE

990 PART VI, LINE 12C

Name of the organization PATHWAYS MANAGEMENT GROUP INC	Employer identification number 27-3946421
---	--

THE ORGANIZATION DISTRIBUTES A WRITTEN CONFLICT OF INTEREST POLICY TO THE BOARD OF DIRECTORS AND OFFICERS. NO DIRECTOR OR BOARD OF DIRECTORS SHALL VOTE ON ANY MATTER OR TRANSACTION CONCERNING OR WITH ANY INDIVIDUAL, ENTITY OR MATTER WITH SUCH DIRECTOR HAS, OR HAD, ANY SUBSTANTIAL OWNERSHIP, EMPLOYMENT, FIDUCIARY CONTRACTURAL OR CREDITOR RELATIONSHIP. EACH DIRECTOR SHALL DISCLOSE IN WRITING ALL CONFLICTS TO THE BOARD OF DIRECTORS PRIOR TO THE DISCUSSION BY THE BOARD OF DIRECTORS AND SHALL DRAW TO THE ATTENTION OF THE BOARD OF DIRECTORS SUCH CONFLICT AT ANY SUBSEQUENT MEETINGS AT WHICH WUCH MATTER OR TRANSACTION IS DISCUSSED. FOLLOWING SUCH DISCLOSURE, A DIRECTOR SHALL BE ENTITLED TO TAKE PART IN THE DISCUSSIONS OF THE BOARD OF DIRECTORS CONCERNING SUCH MATTER AND SHALL BE CONSIDERED IN DETERMINING WHETHER A QUORUM IS PRESENT. THE QUESTION OF WHETHER A CONFLICT EXISTS SHALL, IN THE ABSENCE OF CERTAINTY, BE DETERMINED BY THE VOTE OF A MAJORITY OF DISINTERESTED DIRECTORS PRESENT AT THE MEETING CALLED FOR THE PURPOSE OF DISCUSSING THE TRANSACTION NOR MATTER TO WHICH THE CONFLICT RELATES.

COMPENSATION REVIEW AND APPROVAL

990 PART VI, LINE 15

DIRECTORS SHALL NOT RECEIVE COMPENSATION FOR THE SERVICES, BUT THEY MAY BE REIMBURSED REASONABLE EXPENSES IN CONNECTION WITH THEIR SERVICES AS DIRECTORS. COMPENSATION OF OFFICERS AND KEY EMPLOYEES IS REVIEWED AND APPROVED BY THE BOARD BASED IN PART ON COMPARABILITY DATA.

PUBLIC DISCLOSURE

990 PART VI, LINE 19

Name of the organization

PATHWAYS MANAGEMENT GROUP INC

Employer identification number

27-3946421

THE ORGANIZATION'S GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND RECENT FEDERAL INCOME TAX RETURNS ARE MADE AVAILABLE FOR PUBLIC INSPECTION AT THE ORGANIZATION'S PRINCIPAL OFFICE DURING NORMAL BUSINESS HOURS.

SIGNIFICANT CHANGE IN PROGRAM SERVICES

990 PART III, LINE 3

DURING THE YEAR-ENDED JUNE 30, 2019, THE ORGANIZATION'S BOARD OF DIRECTORS DETERMINED TO CEASE PROVIDING THE BACK OFFICE SERVICES AND IN-STATE EDUCATION SERVICES TO CALIFORNIA CHARTER SCHOOLS. THE ORGANIZATION WOULD CONTINUE TO PROVIDE EDUCATIONAL SERVICES TO NON-CALIFORNIA CHARTER SCHOOLS.

LOSS FROM DISCONTINUED OPERATIONS

FORM PART VIII:

(LOSS) FROM DISCONTINUED OPERATIONS (INCLUDING LOSS FROM LEGAL SETTLEMENT OF \$2,943,538).

 ATTACHMENT 1

 FORM 990, PART X - PREPAID EXPENSES AND DEFERRED CHARGES

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>
PREPAID AND OTHER	465,808.	254,501.
TOTALS	<u>465,808.</u>	<u>254,501.</u>

**SCHEDULE R
(Form 990)**

Related Organizations and Unrelated Partnerships

OMB No. 1545-0047

2018

**Open to Public
Inspection**

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

▶ Attach to Form 990.

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

Department of the Treasury
Internal Revenue Service

Name of the organization

PATHWAYS MANAGEMENT GROUP INC

Employer identification number

27-3946421

Part I Identification of Disregarded Entities. Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1)					
(2)					
(3)					
(4)					
(5)					
(6)					

Part II Identification of Related Tax-Exempt Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1) PERSISTENCE & POSITIVITY, INC 320 NORTH HALSTEAD ST STE 280 PASADENA, CA 91107 27-1001321	EDUCATION	CA	501(C)(3)	7	N/A		X
(2) OPTIONS FOR YOUTH-VICTOR VALLEY 320 N HALSTEAD ST PASADENA, CA 91107 95-4204496	EDUCATION	CA	509(A)(1)	2	OFY-CA INC		X
(3) OPTIONS FOR YOUTH-SAN JUAN 320 N HALSTEAD ST PASADENA, CA 91107 26-0564837	EDUCATION	CA	509(A)(1)	2	OFY-CA INC		X
(4) OPTIONS FOR YOUTH-SAN GABRIEL 320 NORTH HALSTEAD ST PASADENA, CA 91107 95-4602181	EDUCATION	CA	509(A)(1)	2	OFY-CA INC		X
(5) OPTIONS FOR YOUTH-SAN BERNARDINO 320 N HALSTEAD ST PASADENA, CA 91107 27-1001410	EDUCATION	CA	509(A)(1)	2	OFY-CA INC		X
(6) PATHWAYS IN EDUCATION-LOUISIANA INC 320 N HALSTEAD ST PASADENA, CA 91107 20-3243066	EDUCATION	CA	509(A)(1)	2	ED IN MOTION		X
(7) PATHWAYS IN EDUCATION-ARIZONA INC 320 N HALSTEAD ST PASADENA, CA 91107 47-4306981	EDUCATION	CA	509(A)(1)	2	ED IN MOTION		X

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

Schedule R (Form 990) 2018

**SCHEDULE R
(Form 990)**

Related Organizations and Unrelated Partnerships

OMB No. 1545-0047

2018

**Open to Public
Inspection**

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

▶ Attach to Form 990.

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

Department of the Treasury
Internal Revenue Service

Name of the organization

PATHWAYS MANAGEMENT GROUP INC

Employer identification number

27-3946421

Part I Identification of Disregarded Entities. Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1)					
(2)					
(3)					
(4)					
(5)					
(6)					

Part II Identification of Related Tax-Exempt Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1) PATHWAYS IN EDUCATION-ILLINOIS 20-3681896 320 N HALSTEAD ST PASADENA, CA 91107	EDUCATION	CA	509(A)(1)	2	ED IN MOTION		X
(2) PATHWAYS IN EDUCATION-TENNESSEE 46-3518817 320 N HALSTEAD ST PASADENA, CA 91107	EDUCATION	CA	509(A)(1)	2	ED IN MOTION		X
(3) PATHWAYS IN EDUCATION - NAMPA INC 81-4963154 320 N HALSTEAD ST PASADENA, CA 91107	EDUCATION	CA	509(A)(1)	2	NONE		X
(4) OPTIONS FOR YOUTH-ACTON INC 82-2272612 320 N. HALSTEAD STREET #280 PASADENA, CA 91107	EDUCATION	CA	509(A)(1)	2	OFY-CA INC.		X
(5)							
(6)							
(7)							

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

Schedule R (Form 990) 2018

Part III Identification of Related Organizations Taxable as a Partnership. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512 - 514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V - UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	
(1)												
(2)												
(3)												
(4)												
(5)												
(6)												
(7)												

Part IV Identification of Related Organizations Taxable as a Corporation or Trust. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No
(1)									
(2)									
(3)									
(4)									
(5)									
(6)									
(7)									

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

	Yes	No
1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?		
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity.		X
b Gift, grant, or capital contribution to related organization(s)		X
c Gift, grant, or capital contribution from related organization(s)		X
d Loans or loan guarantees to or for related organization(s)	X	
e Loans or loan guarantees by related organization(s)		X
f Dividends from related organization(s)		X
g Sale of assets to related organization(s)		X
h Purchase of assets from related organization(s)		X
i Exchange of assets with related organization(s)		X
j Lease of facilities, equipment, or other assets to related organization(s)		X
k Lease of facilities, equipment, or other assets from related organization(s)		X
l Performance of services or membership or fundraising solicitations for related organization(s)	X	
m Performance of services or membership or fundraising solicitations by related organization(s)		X
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	X	
o Sharing of paid employees with related organization(s)	X	
p Reimbursement paid to related organization(s) for expenses		X
q Reimbursement paid by related organization(s) for expenses		X
r Other transfer of cash or property to related organization(s)		X
s Other transfer of cash or property from related organization(s)		X

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) OPTIONS FOR YOUTH - VICTOR VALLEY	L,N,O	1,930,622.	CONTRACT
(2) OPTIONS FOR YOUTH - SAN JUAN	L,N,O	1,994,562.	CONTRACT
(3) OPTIONS FOR YOUTH - SAN GABRIEL	L,N,O	1,696,339.	CONTRACT
(4) OPTIONS FOR YOUTH - SAN BERNARDINO	L,N,O	1,941,259.	CONTRACT
(5) OPTIONS FOR YOUTH - SAN BERNARDINO	D	500,000.	NEEDS BASED
(6) PATHWAYS IN EDUCATION - LOUISIANA INC	L,N,O	492,887.	CONTRACT

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

	Yes	No
1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?		
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity.	1a	
b Gift, grant, or capital contribution to related organization(s)	1b	
c Gift, grant, or capital contribution from related organization(s)	1c	
d Loans or loan guarantees to or for related organization(s)	1d	
e Loans or loan guarantees by related organization(s)	1e	
f Dividends from related organization(s)	1f	
g Sale of assets to related organization(s)	1g	
h Purchase of assets from related organization(s)	1h	
i Exchange of assets with related organization(s)	1i	
j Lease of facilities, equipment, or other assets to related organization(s)	1j	
k Lease of facilities, equipment, or other assets from related organization(s)	1k	
l Performance of services or membership or fundraising solicitations for related organization(s)	1l	
m Performance of services or membership or fundraising solicitations by related organization(s)	1m	
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	1n	
o Sharing of paid employees with related organization(s)	1o	
p Reimbursement paid to related organization(s) for expenses	1p	
q Reimbursement paid by related organization(s) for expenses	1q	
r Other transfer of cash or property to related organization(s)	1r	
s Other transfer of cash or property from related organization(s)	1s	

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) PATHWAYS IN EDUCATION - LOUISIANA INC	D	200,000.	NEEDS BASED
(2) PATHWAYS IN EDUCATION - ARIZONA INC	L,N,O	145,442.	CONTRACT
(3) PATHWAYS IN EDUCATION - ARIZONA INC	D	2,500,000.	NEEDS BASED
(4) PATHWAYS IN EDUCATION - ILLINOIS	L,N,O	1,507,367.	CONTRACT
(5) PATHWAYS IN EDUCATION - TENNESSEE	L,N,O	511,187.	CONTRACT
(6) PATHWAYS IN EDUCATION - TENNESSEE	D	253,669.	NEEDS BASED

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

	Yes	No
1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?		
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity.	1a	
b Gift, grant, or capital contribution to related organization(s)	1b	
c Gift, grant, or capital contribution from related organization(s)	1c	
d Loans or loan guarantees to or for related organization(s)	1d	
e Loans or loan guarantees by related organization(s)	1e	
f Dividends from related organization(s)	1f	
g Sale of assets to related organization(s)	1g	
h Purchase of assets from related organization(s)	1h	
i Exchange of assets with related organization(s)	1i	
j Lease of facilities, equipment, or other assets to related organization(s)	1j	
k Lease of facilities, equipment, or other assets from related organization(s)	1k	
l Performance of services or membership or fundraising solicitations for related organization(s)	1l	
m Performance of services or membership or fundraising solicitations by related organization(s)	1m	
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	1n	
o Sharing of paid employees with related organization(s)	1o	
p Reimbursement paid to related organization(s) for expenses	1p	
q Reimbursement paid by related organization(s) for expenses	1q	
r Other transfer of cash or property to related organization(s)	1r	
s Other transfer of cash or property from related organization(s)	1s	

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) OPTIONS FOR YOUTH - ACTON, INC	L,N,O	4,032,162.	CONTRACT
(2) OPTIONS FOR YOUTH - ACTON, INC	D	8,995,386.	NEEDS BASED
(3) PATHWAYS IN EDUCATION - NAMPA	L,N,O	185,815.	CONTRACT
(4) PATHWAYS IN EDUCATION - NAMPA	D	1,100,000.	NEEDS BASED
(5)			
(6)			

Part VI **Unrelated Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(e) Are all partners section 501(c)(3) organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V - UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	
(1)													
(2)													
(3)													
(4)													
(5)													
(6)													
(7)													
(8)													
(9)													
(10)													
(11)													
(12)													
(13)													
(14)													
(15)													
(16)													

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Part VII **Supplemental Information**

Provide additional information for responses to questions on Schedule R. See instructions.

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California Exempt Organization Annual Information Return

2018

199

Calendar Year 2018 or fiscal year beginning (mm/dd/yyyy) 07/01/2018, and ending (mm/dd/yyyy) 06/30/2019

Corporation/Organization name PATHWAYS MANAGEMENT GROUP INC California corporation number 3327921

Additional information. See instructions. FEIN 27-3946421

Street address (suite or room) 320 NORTH HALSTEAD ST 210 PMB no.

City PASADENA State CA Zip code 91107

Foreign country name Foreign province/state/county Foreign postal code

A First Return... B Amended Return... C IRC Section 4947(a)(1) trust... D Final Information Return... E Check accounting method... F Federal return filed... G Is this a group filing?... H Is this organization in a group exemption... I Did the organization have any changes to its guidelines not reported to the FTB?...

J If exempt under R&TC Section 23701d, has the organization engaged in political activities? See instructions... K Is the organization exempt under R&TC Section 23701g?... L If organization is a public charity exempt under R&TC Section 23701d and meets the filing fee exception, check box. No filing fee is required... M Is the organization a Limited Liability Company?... N Did the organization file Form 100 or Form 109 to report taxable income?... O Is the organization under audit by the IRS or has the IRS audited in a prior year?... P Is federal Form 1023/1024 pending?...

Part I Complete Part I unless not required to file this form. See General Information B and C.

Table with 4 columns: Description, Line Number, Amount, and Total. Rows include Receipts and Revenues (lines 1-8), Expenses (lines 9-10), and Filing Fee (lines 11-17).

Sign Here: JOHN HALL, PRESIDENT. Preparer's signature: LINDA E G BALLESTEROS. Firm's name: MAGINNIS KNECHTEL & MCINTYRE LLP, 300 W. COLORADO BLVD, PASADENA, CA 91105. Telephone: 626-449-3466.

May the FTB discuss this return with the preparer shown above? See instructions... [X] Yes [] No

Part II Organizations with gross receipts of more than \$50,000 and private foundations regardless of amount of gross receipts - complete Part II or furnish substitute information.

Receipts from Other Sources	1	Gross sales or receipts from all business activities. See instructions	•	1	4,257,793	00
	2	Interest	•	2		00
	3	Dividends	•	3		00
	4	Gross rents	•	4		00
	5	Gross royalties	•	5		00
	6	Gross amount received from sale of assets (See Instructions)	•	6		00
	7	Other income. Attach schedule	•	7	-181,831	00
	8	Total gross sales or receipts from other sources. Add line 1 through line 7. Enter here and on Side 1, Part I, line 1		8	4,075,962	00
Expenses and Disbursements	9	Contributions, gifts, grants, and similar amounts paid. Attach schedule	•	9	586,085	00
	10	Disbursements to or for members	•	10		00
	11	Compensation of officers, directors, and trustees. Attach schedule	•	11	587,047	00
	12	Other salaries and wages	•	12	2,004,454	00
	13	Interest	•	13		00
	14	Taxes	•	14	212,462	00
	15	Rents	•	15	48,194	00
	16	Depreciation and depletion (See instructions)	•	16	83,794	00
	17	Other Expenses and Disbursements. Attach schedule	•	17	998,049	00
	18	Total expenses and disbursements. Add line 9 through line 17. Enter here and on Side 1, Part I, line 9		18	4,520,085	00

Schedule L Balance Sheet	Beginning of taxable year		End of taxable year	
	(a)	(b)	(c)	(d)
Assets				
1 Cash		5,050,663.		7,548,891.
2 Net accounts receivable		13,551,765.		9,706,590.
3 Net notes receivable		8,850,000.		13,549,055.
4 Inventories				
5 Federal and state government obligations				
6 Investments in other bonds				
7 Investments in stock				
8 Mortgage loans				
9 Other investments. Attach schedule				
10 a Depreciable assets	1,024,618.		1,024,618.	
b Less accumulated depreciation	(763,148.)	261,470.	(855,072.)	169,546.
11 Land				
12 Other assets. Attach schedule	ATCH 5	488,724.		278,064.
13 Total assets		28,202,622.		31,252,146.
Liabilities and net worth				
14 Accounts payable		2,081,538.		5,576,649.
15 Contributions, gifts, or grants payable				
16 Bonds and notes payable				
17 Mortgages payable				
18 Other liabilities. Attach schedule				
19 Capital stock or principal fund				
20 Paid-in or capital surplus. Attach reconciliation				
21 Retained earnings or income fund		26,121,084.		25,675,497.
22 Total liabilities and net worth		28,202,622.		31,252,146.

Schedule M-1 Reconciliation of income per books with income per return

Do not complete this schedule if the amount on Schedule L, line 13, column (d), is less than \$50,000

1	Net income per books	•	-445,587.	7	Income recorded on books this year not included in this return. Attach schedule	•	
2	Federal income tax	•		8	Deductions in this return not charged against book income this year. Attach schedule	•	
3	Excess of capital losses over capital gains	•		9	Total. Add line 7 and line 8	•	
4	Income not recorded on books this year. Attach schedule	•		10	Net income per return. Subtract line 9 from line 6	•	-444,123.
5	Expenses recorded on books this year not deducted in this return. Attach schedule. ATCH. 6.	•	1,464.				
6	Total. Add line 1 through line 5	•	-444,123.				

Date Accepted _____

DO NOT MAIL THIS FORM TO THE FTB

TAXABLE YEAR

2018

California e-file Return Authorization for Exempt Organizations

FORM

8453-EO

Exempt Organization name PATHWAYS MANAGEMENT GROUP INC	Identifying number 27-3946421
--	---

Part I Electronic Return Information (whole dollars only)

1 Total gross receipts (Form 199, line 4)	1	4,075,962.
2 Total gross income (Form 199, line 8)	2	4,075,962.
3 Total expenses and disbursements (Form 199, Line 9)	3	4,520,085.

Part II Settle Your Account Electronically for Taxable Year 2018

4 Electronic funds withdrawal 4a Amount 10. 4b Withdrawal date (mm/dd/yyyy) 07/15/2020

Part III Banking Information (Have you verified the exempt organization's banking information?)

5 Routing number 322070381
 6 Account number 31001624 7 Type of account: Checking Savings

Part IV Declaration of Officer

I authorize the exempt organization's account to be settled as designated in Part II. If I check Part II, Box 4, I authorize an electronic funds withdrawal for the amount listed on line 4a.

Under penalties of perjury, I declare that I am an officer of the above exempt organization and that the information I provided to my electronic return originator (ERO), transmitter, or intermediate service provider and the amounts in Part I above agree with the amounts on the corresponding lines of the exempt organization's 2018 California electronic return. To the best of my knowledge and belief, the exempt organization's return is true, correct, and complete. If the exempt organization is filing a balance due return, I understand that if the Franchise Tax Board (FTB) does not receive full and timely payment of the exempt organization's fee liability, the exempt organization will remain liable for the fee liability and all applicable interest and penalties. I authorize the exempt organization return and accompanying schedules and statements be transmitted to the FTB by the ERO, transmitter, or intermediate service provider. **If the processing of the exempt organization's return or refund is delayed, I authorize the FTB to disclose to the ERO or intermediate service provider the reason(s) for the delay.**

Sign Here 07/13/2020 PRESIDENT
 Signature of officer Date Title

Part V Declaration of Electronic Return Originator (ERO) and Paid Preparer. See instructions.

I declare that I have reviewed the above exempt organization's return and that the entries on form FTB 8453-EO are complete and correct to the best of my knowledge. (If I am only an intermediate service provider, I understand that I am not responsible for reviewing the exempt organization's return. I declare, however, that form FTB 8453-EO accurately reflects the data on the return.) I have obtained the organization officer's signature on form FTB 8453-EO before transmitting this return to the FTB; I have provided the organization officer with a copy of all forms and information that I will file with the FTB, and I have followed all other requirements described in FTB Pub. 1345, 2018 Handbook for Authorized e-file Providers. I will keep form FTB 8453-EO on file for **four** years from the due date of the return or **four** years from the date the exempt organization return is filed, whichever is later, and I will make a copy available to the FTB upon request. If I am also the paid preparer, under penalties of perjury, I declare that I have examined the above exempt organization's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. I make this declaration based on all information of which I have knowledge.

ERO Must Sign ERO's signature Date Check if also paid preparer Check if self-employed ERO's PTIN P00366852
 Firm's name (or yours if self-employed) and address MAGINNIS KNECHTEL & MCINTYRE LLP FEIN 95-2746188
300 W. COLORADO BLVD. ZIP code 91105
PASADENA CA

Under penalties of perjury, I declare that I have examined the above organization's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. I make this declaration based on all information of which I have knowledge.

Paid Preparer Must Sign Paid preparer's signature Date Check if self-employed Paid preparer's PTIN
 Firm's name (or yours if self-employed) and address FEIN ZIP code

PART II - OTHER INCOME

LOSS FROM DISCONTINUED OPERATIONS

-181,831.

TOTAL OTHER INCOME

-181,831.

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FORM CA 199, PART II - GRANTS AND ALLOCATIONS PAID DURING THE YEAR

ATTACHMENT 2

<u>RECIPIENT NAME AND ADDRESS</u>	<u>RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND STATUS OF RECIPIENT</u>	<u>PURPOSE OF GRANT OR CONTRIBUTION</u>	<u>AMOUNT</u>
<u>GRANTS PAID</u> PATHWAYS IN EDUCATION, INC. 320 NORTH HALSTEAD STE 210 PASADENA, CA 91107	NON-PROFIT AFFILIATE 501(C)(3)	SCHOLARSHIP PROGRAM AND CHARTER SCHOOL STUDENT FIELD TRIPS	586,085.
		TOTAL CONTRIBUTIONS PAID	<u>586,085.</u>

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COMPENSATION OF OFFICERS, DIRECTORS, AND TRUSTEES

<u>NAME</u>	<u>TITLE</u>	<u>COMPENSATION</u>
ELISIA CHOI	BOARD MEMBER	0.
MARY JENSEN	BOARD MEMBER	0.
DR. STUART GOTHOLD	BOARD MEMBER	0.
JOHN HALL	PRESIDENT	0.
JOAN HALL	VICE PRESIDENT	0.
JAMIE DONAHUE	SECRETARY	0.
JOHN HALL, JR.	TREASURER	0.
JESSICA G RAY	CHIEF ACADEMIC OFFICER	209,386.
ELIZABETH BASKERVILLE	CHIEF FINANCIAL OFFICER	92,773.
TOMMIE JOE	CHIEF OPERATING OFFICER	122,875.
ROBERT VARTANIAN	CHIEF INFORMATION OFFICER	87,777.
PEDRO CANO	CHIEF BUS. DEVELOPMENT OFFICER	74,236.
TOTAL COMPENSATION OF OFFICERS, DIRECTORS, AND TRUSTEES		<u>587,047.</u>

PART II - OTHER EXPENSES

PENSION EXPENSE	44,410.
EMPLOYEE BENEFITS	243,941.
OTHER FEES FOR SVCS	261,739.
ADVERTISING	44,177.
OFFICE EXPENSES	173,064.
INFO. TECHNOLOGY	3,178.
TRAVEL EXPENSES	185,159.
INSURANCE	656.
LEASEHOLD IMPROVEMENT	19,558.
EMPLOYEE RELATED COSTS	9,248.
STUDENT PROGRAM	6,993.
DUES AND SUBSCRIPTION	3,487.
SMALL EQUIPMENT & FURNITURE	2,124.
BUSINESS TAXES AND LICENSE	315.
TOTAL OTHER EXPENSES	<u>998,049.</u>

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SCHEDULE L - OTHER ASSETS

<u>DESCRIPTION</u>	<u>BEG. OF YEAR</u>	<u>END OF YEAR</u>
SECURITY DEPOSITS	22,589.	23,236.
EMPLOYEE ADVANCE	327.	327.
PREPAID EXPENSES	465,808.	254,501.
TOTAL OTHER ASSETS	<u>488,724.</u>	<u>278,064.</u>

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SCHEDULE M-1 - EXPENSES RECORDED ON BOOKS THIS YEAR NOT DEDUCTED

UNREALIZED LOSSES	1,464.
TOTAL EXPENSES RECORDED ON BOOKS THIS YEAR NOT DEDUCTED	<u>1,464.</u>

Client Copy

MAIL TO:
 Registry of Charitable Trusts
 P.O. Box 903447
 Sacramento, CA 94203-4470
 (916) 210-6400

ANNUAL REGISTRATION RENEWAL FEE REPORT TO ATTORNEY GENERAL OF CALIFORNIA

OFFICE OF THE
 ATTORNEY GENERAL

Sections 12586 and 12587, California Government Code
 11 Cal. Code Regs. sections 301-307, 311 and 312

CALIFORNIA
 DEPARTMENT
 OF JUSTICE

WEB SITE ADDRESS:
<http://ag.ca.gov/charities/>

Failure to submit this report annually no later than the 15th day of the 5th month after the end of the organization's accounting period may result in the loss of tax exemption and the assessment of a minimum tax of \$800, plus interest, and/or fines or filing penalties as defined in Government Code Section 12586.1. IRS extensions will be honored.

State Charity Registration Number <u>CT0205884</u> PATHWAYS MANAGEMENT GROUP INC Name of Organization 320 NORTH HALSTEAD ST Address (Number and Street) PASADENA CA 91107 City or Town, State and ZIP Code	Check if: <input type="checkbox"/> Change of address <input type="checkbox"/> Amended report Corporate or Organization No. <u>3327921</u> Federal Employer I.D. No. <u>27-3946421</u>
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ANNUAL REGISTRATION RENEWAL FEE SCHEDULE (11 Cal. Code Regs. sections 301-307, 311 and 312)
Make Check Payable to Attorney General's Registry of Charitable Trusts

Gross Annual Revenue	Fee	Gross Annual Revenue	Fee	Gross Annual Revenue	Fee
Less than \$25,000	0	Between \$100,001 and \$250,000	\$50	Between \$1,000,001 and \$10 million	\$150
Between \$25,000 and \$100,000	\$25	Between \$250,001 and \$1 million	\$75	Between \$10,000,001 and \$50 million	\$225
				Greater than \$50 million	\$300

PART A - ACTIVITIES

For your most recent full accounting period (beginning 07/01/2018 ending 06/30/2019) list:

Gross annual revenue \$ 4,075,962. Total assets \$ 31,252,146.

PART B - STATEMENTS REGARDING ORGANIZATION DURING THE PERIOD OF THIS REPORT

Note: If you answer "yes" to any of the questions below, you must attach a separate sheet providing an explanation and details for each "yes" response. Please review RRF-1 instructions for information required.

	Yes	No
1. During this reporting period, were there any contracts, loans, leases or other financial transactions between the organization and any officer, director or trustee thereof either directly or with an entity in which any such officer, director or trustee had any financial interest? ATTACH 7	X	
2. During this reporting period, was there any theft, embezzlement, diversion or misuse of the organization's charitable property or funds?		X
3. During this reporting period, did non-program expenditures exceed 50% of gross revenues?		X
4. During this reporting period, were any organization funds used to pay any penalty, fine or judgment? If you filed a Form 4720 with the Internal Revenue Service, attach a copy.		X
5. During this reporting period, were the services of a commercial fundraiser or fundraising counsel for charitable purposes used? If "yes", provide an attachment listing the name, address, and telephone number of the service provider.		X
6. During this reporting period, did the organization receive any governmental funding? If so, provide an attachment listing the name of the agency, mailing address, contact person, and telephone number.		X
7. During this reporting period, did the organization hold a raffle for charitable purposes? If "yes", provide an attachment indicating the number of raffles and the date(s) they occurred.		X
8. Does the organization conduct a vehicle donation program? If "yes", provide an attachment indicating whether the program is operated by the charity or whether the organization contracts with a commercial fundraiser for charitable purposes.		X
9. Did your organization have prepared an audited financial statement in accordance with generally accepted accounting principles for this reporting period?	X	

Organization's area code and telephone number (626) 683-3500

Organization's e-mail address _____

I declare under penalty of perjury that I have examined this report, including accompanying documents, and to the best of my knowledge and belief, it is true, correct and complete.

_____ Signature of authorized officer	JOHN HALL Printed Name	PRESIDENT Title	_____ Date
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PART B, LINE 1 - TRANSACTIONS WITH OFFICERS, DIRECTORS OR TRUSTEE

EXPLANATION

THE ORGANIZATION INCURRED FINANCIAL TRANSACTIONS WITH OTHER ORGANIZATIONS CONTROLLED BY OFFICERS OF THE REPORTING ORGANIZATION. PLEASE REFER TO FEDERAL FORM 990 SCHEDULE L AND SCHEDULE R ATTACHED.

Client Copy

Appendix B - Curriculum Outline Per Grade

Pathways In Education - North Carolina

Appendix B: Curriculum Outline Per Grade Span (for each grade span the school would ultimately serve). One sample curriculum outline (in graph form) in the Appendices for one core subject (specific to the school's purpose) for each grade span the school would ultimately serve.

Pathways In Education - North Carolina

English Curriculum Framework

Course: English 1 (1 credit)

Course Description: English 1 is a year-long course that will expose students to both fictional stories and non-fiction articles. This course will enhance students' ability to comprehend, develop, and analyze the content of the reading assignments. It will expose students to authors' intent and literature concepts. Each lesson will develop and increase students' fluency and vocabulary. An aspect of grammar will be introduced and students will implement this knowledge in their own writing. A fictional novel will accompany this course that will utilize the students' imagination and creativity. At the end of each unit, students will have an opportunity to incorporate what they have learned in their writing.

This course is aligned to the North Carolina Standard Course of Study for English Language Arts, K-12, as adopted in April 2017. All standards covered in the course will be referenced in the framework and all informal (I) and formal (F) assessments are indicated for the entire unit of study.

Required Materials: *Texts: Romeo and Juliet – No Fear Shakespeare, William Shakespeare, Sparknotes, 2003; The Hunger Games, Suzanne Collins, Scholastic Press, 2008; All other readings and external instruction can be found on course website: <https://sites.google.com/skyrocket-ed.com/english11/home>*

Supplemental Materials: *Poetry Foundation, Various Authors, The Poetry Foundation <https://www.poetryfoundation.org/poems>*

Course Goals and Expected Outcomes

The purpose of English 1 is to expose students to various forms of fiction and nonfiction. Students will understand an assortment of literary concepts, including point of view, authors' purpose and literary analysis. This course will allow students to increase reading comprehension by making predictions, analysis of structure and format, and inferences. In addition, the goal of this course is to increase students' reading fluency, vocabulary, speaking and listening comprehension and grammar skills. Students will structure multiple academic essays to increase writing skills. SDAIE strategies will be implemented throughout the Specially Designed Academic Instruction in English (SDAIE) curriculum allowing students to increase English language skills. This course enhances students' ability to comprehend, develop, and analyze the content of the reading assignments. It exposes students to authors' intent and literature concepts. Each lesson develops and increases students' fluency and vocabulary. Grammar skills are introduced and practiced regularly, helping students implement the new skills into their own writing. A fictional novel accompanies this course

that stimulates imagination and creativity. In each unit, students have many opportunities to incorporate what they have learned into their writing.

Students will:

- Read and comprehend various fiction and nonfiction texts.
- Analyze and interpret figurative language.
- Demonstrate prediction and inference skills while interpreting the text.
- Recognize structure in the text.
- Develop fluency.
- Demonstrate ability to summarize and paraphrase.
- Recognize the main idea of the text.
- Note authors' style and purpose.
- Identify themes in literature.
- Develop and apply academic vocabulary.
- Increase comprehension and fluency with new vocabulary.
- Identify prefixes, suffixes and root words in the vocabulary.
- Write a two-page academic paper.
- Use correct grammar and punctuation in writing.
- Write with purpose.
- Analyze writing structures and apply knowledge.
- Identify mood and tone of oral communication.
- Listen and comprehend oral speeches and presentations.
- Orally communicate effectively with a purpose.
- Use tone and mood to affect audience.
- Orally implement rhetorical devices.
- Analyze the written structure and presentation of plays.
- Analyze various written and oral structures of prose.

Instructional Methods:

- **Graphic organizers**, which help students see connections between curriculum concepts
- **Sequential instruction**, which breaks processes into clear steps
- **Essential questions/big ideas**, which help students make connections between concepts and learn to use higher-order thinking skills
- **Guided practice**, which teaches students to follow a specific set of procedures and allows them to practice new skills with support
- **Scaffolding** and pre-teach/re-teach techniques, which provide support while students are learning new knowledge and skills, gradually reducing the level of support as students move toward independence
- **Modeling**, which demonstrates actions and thought processes for students to emulate
- **Note-taking guides**, which support learning from texts or lectures and remind students of key information or processes
- Detailed **checklists and rubrics**, which give students specific guidance and feedback about what they are doing well and what they need to change

- **Vocabulary word studies**, which provide additional instructional support to students who lack the necessary background knowledge and increase the content accessibility
- **Authentic scenarios**, which are engaging, real-world tasks culminating in student-generated products and performances
- **Interactive learning experiences**, such as question-based discourse, which allow students to develop explanations, make predictions, debate alternative approaches to problems, and consider the implications and applications of concepts
- **Integration of technology**: computers with internet access are used for independent research, diagrams and demonstrations, and primary-source projects

The general pacing of this course is based off the semester schedule. Semester A Units 1-5 are worth 0.5 credits and Semester B Units 6-10 are worth 0.5 credits.

Unit 1 Overview	North Carolina ELA Standards	Skills and Concepts	Assessments
<p>UNIT 1: Fiction Students will begin their study of fiction through the study and application of various introductory literary concepts. This includes being able to identify various plot elements (author’s purpose, setting) and mapping out plot structure through storyboarding. Students will use prediction strategies to engage in active readings of the mandatory texts. Additionally, students will study characterization, character motives, and how a character moves the plot forward, especially as seen through conflict motivation. Students will wrap up their learning for the unit by producing a character analysis.</p> <p>Instructional Unit Introduction to Fiction</p> <p>Objectives -Identify and summarize the main elements of plot structure in a given text -Explain how characters help to advance the plot -Identify and use various types of clauses and sentence types -Understand how conflict is revealed through various texts -Know and understand the context of period vocabulary</p>	<p>Reading: Literature RL.9-10.1 Cite strong and thorough textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text. RL.9-10.2 Determine a theme or central idea of a text and analyze in detail its development over the course of the text, including how it emerges and is shaped and refined by specific details, and provide an objective summary of the text. RL.9-10.3 Analyze how complex characters develop over the course of a text, interact with other characters, and advance the plot or develop the theme. RL.9-10.4 Determine the meaning of words and phrases as they are used in the text; analyze the cumulative impact of specific word choices on meaning and tone. RL.9-10.5 Analyze how an author’s choices concerning how to structure a text, order events within it, and manipulate time create</p>	<p>Literary Fiction and nonfiction reading skills, making predictions, prefixes, anecdotes, comparing literary works, comparing literary points of view, novel structure, and authors’ purpose</p> <p>Writing The writing process, writing guidelines, literature responses, character analysis responses, personal narrative, critical thinking response, autobiographical narrative essay writing, and narrative essay writing</p> <p>Language/Grammar Interviewing skills, and common and proper nouns</p> <p>Grammar Focus Students will be able to identify various sentence and clause types and understand their functionality within a text.</p>	<p><i>Informal (I) Formal (F)</i></p> <p>Reader’s Workshop (I) Students will reflect on how they have used reading strategies throughout the unit and list examples.</p> <p>Vocabulary Word Study (I) Before each selection, students review key vocabulary words and their definitions. They encounter these words throughout the unit in many forms: they discover the words’ Latin or Greek roots, find synonyms and antonyms, explore the words in context, and learn how to use the words properly. After this in-depth study, students show their understanding by inventing their own definitions, using the words in their own sentences, finding related word forms, and creating cartoons or drawings to help them remember the words.</p> <p>Writing a Paragraph (I)</p>

<p>Semester Essential Question Is conflict necessary?</p> <p>Readings "AandP" by John Updike "Everyday Use" by Alice Walker "The Secret Life of Walter Mitty" by James Thurber "New Directions" by Maya Angelou Excerpt of "Lamb to the Slaughter" by Roald Dahl</p> <p>WIDA ELD Language Objectives -Students will justify a position and provide evidence in one or more paragraphs. -Students will connect Latin or Greek roots to create their own word forms.</p>	<p>effects such as mystery, tension, or surprise. RL.9-10.6 Analyze a particular perspective or cultural experience reflected in a work of literature from outside the United States, drawing on a wide reading of world literature. RL.9-10.9 Analyze how an author adopts or adapts source material in a specific work. RL.9-10.10 By the end of grade 9, read and understand literature within the 9-10 text complexity band proficiently and independently for sustained periods of time. Connect prior knowledge and experiences to text.</p> <p>Writing W.9-10.1 Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence. a. Organize information and ideas around a topic to plan and prepare to write. b. Introduce precise claim(s), distinguish the claim(s) from alternate or opposing claims, and create an organization that establishes clear relationships among claim(s), counterclaims, reasons, and evidence. c. Develop claim(s) and counterclaims fairly, supplying evidence for each while pointing out the strengths and limitations of both in a manner that anticipates the audience's</p>		<p>Students will write a paragraph using a topic sentence, concrete detail, two commentaries and a concluding sentence. Students will respond to a writing prompt based on what they have read across several selections in this unit.</p> <p>Grammar Workshops (I) Students will participate in grammar workshops where they will learn basic sentence structure while focusing on common nouns and proper nouns.</p> <p>Critical Thinking Responses (I) -1-2-page responses based on specific skills and elements -Sample topics include conflict, literary devices, setting, author's purpose and theme -Students use higher order thinking skills to draw conclusions about an author's choices.</p> <p>Writing Conferences (I) Before each writing the final draft of a major assignment, students will participate in a writing conference with the teacher, who will give oral and written feedback that the students will use to revise their drafts. Conferencing will repeat until the assignment has reached a satisfactory level of proficiency.</p>
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	<p>knowledge level and concerns.</p> <p>d. Use words, phrases, and clauses to link the major sections of the text, create cohesion, and clarify the relationships between claim(s) and reasons, between reasons and evidence, and between claim(s) and counterclaims.</p> <p>e. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing.</p> <p>f. Provide a concluding statement or section that follows from and supports the argument presented.</p> <p>g. Develop and strengthen writing as needed by revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience.</p> <p>W.9-10.2 Write informative/explanatory texts to examine and convey complex ideas, concepts, and information clearly and accurately through the effective selection, organization, and analysis of content.</p> <p>a. Organize information and ideas around a topic to plan and prepare to write.</p> <p>b. Introduce a topic; organize complex ideas, concepts, and information to make important connections and distinctions; include formatting, graphics, and multimedia when useful to aiding comprehension.</p>		<p>Prediction Map (I) Students will use a graphic organizer to record and assess predictions using the reading selections in this unit. Students will analyze predictions that were correct and incorrect to see why they were able to come up with the right or wrong guesses.</p> <p>Check for Understanding: Self-Tests (I) Throughout the unit, students will perform self-checks in order to assess their level of understanding with regards to key concepts and reading assignments. These self-tests will be used as a benchmark for teachers to determine if additional instruction is necessary.</p> <p>Unit Assessment: Key Assignments (F) 1. Plot Storyboard and analysis based on "Secret Life of Walter Mitty." Students will use the provided graphic organizer to organize plot structure. Students will show mastery for the following objective: Identify and summarize the main elements of plot structure in a given text.</p> <p>2. Character analysis written response. Students will produce a 2-3 paragraph written response about characters moving the plot forward. Students will</p>
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	<p>c. Develop the topic with well chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience's knowledge of the topic.</p> <p>d. Use appropriate and varied transitions to link the major sections of the text, create cohesion, and clarify the relationships among complex ideas and concepts.</p> <p>e. Use precise language and domain-specific vocabulary to manage the complexity of the topic.</p> <p>f. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing.</p> <p>g. Provide a concluding statement or section that follows from and supports the information or explanation presented.</p> <p>h. Develop and strengthen writing as needed by revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience.</p> <p>W.9-10.3 Write narratives to develop real or imagined experiences or events using effective technique, well-chosen details, and well-structured event sequences.</p> <p>a. Organize information and ideas around a topic to plan and prepare to write.</p>		<p>show mastery for the following objective: Explain how characters help to advance the plot.</p> <p>Unit Assessment: Test (F) Students will be assessed on concepts taught in the unit. Test questions will vary in length and style such as multiple-choice and critical-thinking short essay questions.</p>
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	<p>b. Engage and orient the reader by setting out a problem, situation, or observation, establishing one or multiple point(s) of view, and introducing a narrator and/or characters; create a smooth progression of experiences or events.</p> <p>c. Use narrative techniques, such as dialogue, pacing, description, reflection, and multiple plot lines, to develop experiences, events, and/or characters.</p> <p>d. Use a variety of techniques to sequence events so that they build on one another to create a coherent whole.</p> <p>e. Use precise words and phrases, telling details, and sensory language to convey a vivid picture of the experiences, events, setting, and/or characters.</p> <p>f. Provide a conclusion that follows from and reflects on what is experienced, observed, or resolved over the course of the narrative.</p> <p>g. Develop and strengthen writing as needed by revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience.</p> <p>Language</p> <p>L.9-10.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing; demonstrate proficiency within the 9-12 conventions continuum.</p> <p>L.9-10.6 Acquire and use accurately general</p>		
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	<p>academic and domain specific words and phrases, sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in developing vocabulary knowledge when considering a word or phrase important to comprehension or expression.</p> <p>WIDA ELD Standards Standard 1 – Social and Instructional Language English language learners communicate for social and instructional purposes within the school setting. Standard 2 – Language of Language Arts English language learners communicate information, ideas, and concepts necessary for academic success in the content area of language arts.</p>		
Unit 2 Overview	North Carolina ELA Standards	Skills and Concepts	Assessments
<p>UNIT 2: Fiction Students will continue to grow their knowledge of the fictional genre as they delve deeper into more complex concepts of theme and character. With an overall attention to developing a theme, students will learn how to analyze the specific uses of words and phrases that impact that theme. Additionally, they will learn to identify the mood of a text and how that also impacts the development of the theme. Students will extend their writing practices into developing well thought out, objective, and purposeful summaries of the texts they read in the unit. Finally,</p>	<p>Reading: Literature RL.9-10.1 Cite strong and thorough textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text. RL.9-10.2 Determine a theme of a text and analyze in detail its development over the course of the text, including how it emerges and is shaped and refined by specific details; provide an objective summary of the text. RL.9-10.3 Analyze how complex characters</p>	<p>Literary Fiction v. nonfiction reading skills, author’s purpose, character, analyze structure and format</p> <p>Writing Critical thinking responses, graphic organizer, journal, and problem-solution essay writing</p> <p>Language/Grammar Adjectives and adverbs, prepositional phrases, modifiers, pronouns, figurative language, voice, root words, and suffixes</p>	<p><i>Informal (I) Formal (F)</i></p> <p>Reader’s Workshop (I) Students will reflect on how they have used reading strategies throughout the unit and list examples.</p> <p>Vocabulary Word Study (I) Before each selection, students review key vocabulary words and their definitions. They encounter these words throughout the unit in many forms: they discover the words’ Latin or Greek roots, find synonyms and</p>

<p>students will combine their new found knowledge of plot development and structure and tie that into the impact those concepts have on the overall conflict theme being stressed.</p> <p>Instructional Unit Theme Analysis, Part 1</p> <p>Objectives -Determine the theme of a given text -Provide an objective summary of multiple texts -Identify and use various types of clauses and sentence types -Analyze how choices in plot development of a given text affects mood -Know and understand the context of various multiple-meaning words</p> <p>Semester Essential Question Is conflict necessary?</p> <p>Readings “The Necklace” by Guy de Maupassant “Golden Kite, Silver Wind” by Ray Bradbury “Gift of the Magi” by O. Henry</p> <p>WIDA ELD Language Objectives -Students will use sentence frames to discuss the author’s purpose in the novel with peers. -Students will examine the profile of a character by identifying key details that convey meaning about the character’s background.</p>	<p>develop over the course of a text, interact with other characters, and advance the plot or develop the theme. RL.9-10.4 Determine the meaning of words and phrases as they are used in the text; analyze the cumulative impact of specific word choices on meaning and tone. RL.9-10.5 Analyze how an author’s choices concerning how to structure a text, order events within it, and manipulate time create effects such as mystery, tension, or surprise. RL.9-10.6 Analyze a particular perspective or cultural experience reflected in a work of literature from outside the United States, drawing on a wide reading of world literature. RL.9-10.9 Analyze how an author adopts or adapts source material in a specific work. RL.9-10.10 By the end of grade 9, read and understand literature within the 9-10 text complexity band proficiently and independently for sustained periods of time. Connect prior knowledge and experiences to text.</p> <p>Writing W.9-10.4 Use digital tools and resources to produce, publish, and update individual or shared writing products, taking advantage of technology’s capacity to link to other information and to display information flexibly and dynamically</p>		<p>antonyms, explore the words in context, and learn how to use the words properly. After this in-depth study, students show their understanding by inventing their own definitions, using the words in their own sentences, finding related word forms, and creating cartoons or drawings to help them remember the words.</p> <p>Grammar Workshops (I) Students will participate in grammar workshops where they will learn basic sentence structure while focusing on pronouns.</p> <p>Writing Conferences (I) Before each writing the final draft of a major writing assignment, students will participate in a writing conference with the teacher, who will give oral and written feedback that the students will use to revise their drafts. Conferencing will repeat until the assignment has reached a satisfactory level of proficiency.</p> <p>Literary Response (I) For each selection that is read, students will interact with the content. They will answer questions, pose questions, and complete various analysis charts.</p>
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	<p>W.9-10.6 Gather relevant information from multiple authoritative print and digital sources, using advanced searches effectively; assess the usefulness of each source in answering the research question; integrate information into the text selectively to maintain the flow of ideas, avoiding plagiarism and following a standard format for citation.</p> <p>Speaking and Listening SL.9-10.5 Make strategic use of digital media in presentations to enhance understanding of findings, reasoning, and evidence and to add interest.</p> <p>Language L.9-10.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking; demonstrate proficiency within the 9-12 grammar continuum. L.9-10.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing; demonstrate proficiency within the 9-12 conventions continuum. L.9-10.4 Determine and/or clarify the meaning of unknown and multiple-meaning words and phrases based on grades 9–10 reading and content, choosing flexibly from a range of strategies: context clues, word parts, word relationships, and reference materials.</p>		<p>Check for Understanding: Self-Tests (I) Throughout the unit, students will perform self-checks in order to assess their level of understanding with regards to key concepts and reading assignments. These self-tests will be used as a benchmark for teachers to determine if additional instruction is necessary.</p> <p>Pronouns (I) Students will identify pronouns using examples from the reading selections in this unit. Students will differentiate between relative, interrogative and indefinite pronouns. Students will also complete example sentences using the correct pronoun.</p> <p>Unit Assessment: Key Assignments (F) 1. Objective summary of a short text Students will write a paragraph long objective summary of each text read in the unit. Students will show mastery for the following objective: determine the theme of a given text; provide an objective summary of multiple texts. 2. Extended writing response about mood impacting choices in plot development Students will write a 2-3 paragraph analysis of how mood impacts the development of plot. Students will show mastery for the following objective:</p>
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	<p>L.9-10.6 Acquire and use accurately general academic and domain specific words and phrases, sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in developing vocabulary knowledge when considering a word or phrase important to comprehension or expression.</p> <p>WIDA ELD Standards Standard 1 – Social and Instructional Language English language learners communicate for social and instructional purposes within the school setting. Standard 2 – Language of Language Arts English language learners communicate information, ideas, and concepts necessary for academic success in the content area of language arts.</p>		<p>analyze how choices in plot development of a given text affects mood.</p> <p>3. Theme analysis for three texts Students will write an essay in which they analyze any themes that cross all three texts from the unit. Students will show mastery for the following objective(s): determine the theme of a given text, and identify and use various types of clauses and sentence types.</p> <p>Unit Assessment: Test (F) Students will be assessed on concepts taught in the unit. Test questions will vary in length and style such as multiple-choice and critical-thinking short essay questions.</p>
Unit 3 Overview	North Carolina ELA Standards	Skills and Concepts	Assessments
<p>UNIT 3: Fiction Students will wrap up their exploration of various fictional genres in this unit. Students will learn how to tie in various opinions and claims as well as relevant, textual evidence into their theme analysis. The essential question of “Is conflict necessary?” will be seriously questioned with the texts that are chosen. Students will explore the conflict of every text, its impact on character and theme development, as well as whether or not it is indeed a necessary entity. Students will write extensively and with textual evidence on a number</p>	<p>Reading: Literature RL.9-10.1 Cite strong and thorough textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text. RL.9-10.2 Determine a theme of a text and analyze in detail its development over the course of the text, including how it emerges and is shaped and refined by specific details; provide an objective summary of the text.</p>	<p>Literary Short story reading comprehension, narration, making inferences, conflict, critique of functional documents, and comparing literary works for setting.</p> <p>Writing Critical thinking responses, graphic organizer, journal, cause and effect, and essay writing</p> <p>Language/Grammar Regular and irregular verbs, parallel structure, and Latin suffixes</p> <p>Grammar Focus Punctuation</p>	<p><i>Informal (I) Formal (F)</i></p> <p>Reader’s Workshop (I) Students will reflect on how they have used reading strategies throughout the unit and list examples.</p> <p>Vocabulary Word Study (I) Before each selection, students review key vocabulary words and their definitions. They encounter these words throughout the unit in many forms: they discover the words’ Latin or Greek roots,</p>

<p>of conflict-related activities, and they will practice the use of accurate basic and advanced punctuation rules.</p> <p>Instructional Unit Theme Analysis, Part 2</p> <p>Objectives -Analyze how a theme is developed over the course of a text through the use of characters and plot devices -Use both explicit and implicit textual evidence to support a claim -Analyze how characters in conflict help to advance the plot or develop the theme of a given text -Produce writing tasks that include textual evidence -Know and understand the context of multiple meaning words</p> <p>Semester Essential Question Is conflict necessary?</p> <p>Readings "The Most Dangerous Game" by Richard Connell "Interlopers" by Saki "Rules of the Game" by Amy Tan Excerpt from The House on Mango Street</p> <p>WIDA ELD Language Objectives: -Students will be able to orally discuss inferences found in the text in order to add to their understanding of the story. -Students will use a Venn diagram graphic organizer to compare/contrast the settings of the stories.</p>	<p>RL.9-10.3 Analyze how complex characters develop over the course of a text, interact with other characters, and advance the plot or develop the theme. RL.9-10.4 Determine the meaning of words and phrases as they are used in the text; analyze the cumulative impact of specific word choices on meaning and tone. RL.9-10.5 Analyze how an author's choices concerning how to structure a text, order events within it, and manipulate time create effects such as mystery, tension, or surprise. RL.9-10.6 Analyze a particular perspective or cultural experience reflected in a work of literature from outside the United States, drawing on a wide reading of world literature. RL.9-10.9 Analyze how an author adopts or adapts source material in a specific work. RL.9-10.10 By the end of grade 9, read and understand literature within the 9-10 text complexity band proficiently and independently for sustained periods of time. Connect prior knowledge and experiences to text.</p> <p>Writing W.9-10.2 Write informative/explanatory texts to examine and convey complex ideas, concepts, and information clearly and accurately through the effective selection, organization, and analysis of content.</p>	<p>Students will be able to identify basic and advanced forms of punctuation, and use properly in their written submissions.</p>	<p>find synonyms and antonyms, explore the words in context, and learn how to use the words properly. After this in-depth study, students show their understanding by inventing their own definitions, using the words in their own sentences, finding related word forms, and creating cartoons or drawings to help them remember the words.</p> <p>Literary Response (I) For each selection that is read, students will interact with the content. They will answer questions, pose questions, and complete various analysis charts.</p> <p>Grammar Workshops (I) Students will participate in grammar workshops where they will learn basic sentence structure while focusing on regular and irregular verbs.</p> <p>Making Inferences (I) Students will identify three inferences they made during the reading of <i>unit texts</i> using context clues. When the reading is complete, they will analyze their inferences and explain if the inferences added to their understanding of the story.</p> <p>Check for Understanding: Self-Tests (I) Throughout the unit, students will perform</p>
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	<p>a. Organize information and ideas around a topic to plan and prepare to write.</p> <p>b. Introduce a topic; organize complex ideas, concepts, and information to make important connections and distinctions; include formatting, graphics, and multimedia when useful to aiding comprehension.</p> <p>c. Develop the topic with well chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience’s knowledge of the topic.</p> <p>d. Use appropriate and varied transitions to link the major sections of the text, create cohesion, and clarify the relationships among complex ideas and concepts.</p> <p>e. Use precise language and domain-specific vocabulary to manage the complexity of the topic.</p> <p>f. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing.</p> <p>g. Provide a concluding statement or section that follows from and supports the information or explanation presented.</p> <p>h. Develop and strengthen writing as needed by revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant</p>		<p>self-checks in order to assess their level of understanding with regards to key concepts and reading assignments. These self-tests will be used as a benchmark for teachers to determine if additional instruction is necessary.</p> <p>Unit Assessment: Key Assignments (F)</p> <p>1. Finding Evidence for Identified Theme Students will complete a graphic organizer for each text that allows them to show the evidence they’ve gathered for the theme of each text. Students will show mastery for the following objective: Use both explicit and implicit textual evidence to support a claim.</p> <p>2. Theme Analysis Essay Students will write a 2-3 paragraph analysis of how conflict is developed throughout a text and how it impacts the development of the plot. Students will show mastery for the following objective(s): Analyze how characters in conflict help to advance the plot or develop the theme of a given text; Produce writing tasks that include textual evidence; Analyze how a theme is developed over the course of a text through the use of characters and plot devices.</p> <p>Unit Assessment: Test (F)</p>
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	<p>for a specific purpose and audience.</p> <p><i>Speaking and Listening</i> SL.9-10.4 Present information, findings, and supporting evidence clearly, concisely, and logically such that listeners can follow the line of reasoning and the organization, development, substance, and style are appropriate to purpose, audience, and task.</p> <p><i>Language</i> L.9-10.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking; demonstrate proficiency within the 9-12 grammar continuum. L.9-10.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing; demonstrate proficiency within the 9-12 conventions continuum. L.9-10.6 Acquire and use accurately general academic and domain specific words and phrases, sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in developing vocabulary knowledge when considering a word or phrase important to comprehension or expression.</p> <p>WIDA ELD Standards Standard 1 – Social and Instructional Language English language learners communicate</p>		<p>Students will be assessed on concepts taught in the unit. Test questions will vary in length and style such as multiple-choice and critical-thinking short essay questions.</p>
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	for social and instructional purposes within the school setting. Standard 2 – Language of Language Arts English language learners communicate information, ideas, and concepts necessary for academic success in the content area of language arts.		
Unit 4 Overview	North Carolina ELA Standards	Skills and Concepts	Assessments
<p>UNIT 4: Reading Fiction: Elements of Drama</p> <p>Students will begin their study of the Drama genre. They will be introduced to basic dramatic elements such as stage directions, monologue, apostrophe and dialogue, and they will explain how each of these are incorporated within the contexts of given readings. In this unit, students put together all of their previous writing practices to begin developing a more complex and rigorous essay structure. They will develop, write, and edit thesis statements and learn how to use various types of evidence to support their claims and thesis statements. Finally, students will engage with the text, <i>Romeo and Juliet</i>,” while they complete assignments that help them come to a greater understanding of the language and thematic elements.</p> <p>Instructional Unit Elements of Drama</p> <p>Objectives</p> <ul style="list-style-type: none"> -Identify elements of drama in a given act or scene -Infer the meaning of a word in a given text, especially as it relates to conflict in drama -Identify and use various types of clauses and sentence types -Understand plot in a Shakespearean play 	<p>Reading: Literature</p> <p>RL.9-10.1 Cite strong and thorough textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.</p> <p>RL.9-10.2 Determine a theme of a text and analyze in detail its development over the course of the text, including how it emerges and is shaped and refined by specific details; provide an objective summary of the text.</p> <p>RL.9-10.3 Analyze how complex characters develop over the course of a text, interact with other characters, and advance the plot or develop the theme.</p> <p>RL.9-10.4 Determine the meaning of words and phrases as they are used in the text; analyze the cumulative impact of specific word choices on meaning and tone.</p> <p>RL.9-10.5 Analyze how an author’s choices concerning how to structure a text, order events within it, and manipulate time create effects such as mystery, tension, or surprise.</p> <p>RL.9-10.6 Analyze a particular perspective or</p>	<p>Literary</p> <p>Cause and effect, characterization, analysis of structure and format, and comparing literary works with symbolism and allegory</p> <p>Writing</p> <p>Cause and effect essay writing, main ideas, details, plagiarism, research, and technology</p> <p>Language/Grammar</p> <p>Subjects and predicates and Latin root words</p> <p>Grammar Focus</p> <p>Creating and using complex and compound sentences Students will be able to create and use various sentence structures within their writing.</p>	<p><i>Informal (I) Formal (F)</i></p> <p>Reader’s Workshop (I) Students will reflect on how they have used reading strategies throughout the unit and list examples.</p> <p>Vocabulary Word Study (I) Before each selection, students review key vocabulary words and their definitions. They encounter these words throughout the unit in many forms: they discover the words’ Latin or Greek roots, find synonyms and antonyms, explore the words in context, and learn how to use the words properly. After this in-depth study, students show their understanding by inventing their own definitions, using the words in their own sentences, finding related word forms, and creating cartoons or drawings to help them remember the words.</p> <p>Literary Response (I) For each selection that is read, students will interact with the content. They will</p>

<p>-Analyze various themes in a Shakespearean play -Know and understand the context of period vocabulary and language</p> <p>Semester Essential Question Is conflict necessary?</p> <p>Readings Excerpt from “The Inspector-General” by Anton Chekov “Romeo and Juliet” by William Shakespeare (Acts 1-2)</p> <p>WIDA ELD Language Objectives: -Students will be able to identify some causes and effects found in the story by discussing them in small groups or with a teacher using academic language. -Students will be able to justify an opinion on a speech, by writing a one-page, multi-paragraph response.</p>	<p>cultural experience reflected in a work of literature from outside the United States, drawing on a wide reading of world literature.</p> <p>RL.9-10.9 Analyze how an author adopts or adapts source material in a specific work.</p> <p>RL.9-10.10 By the end of grade 9, read and understand literature within the 9-10 text complexity band proficiently and independently for sustained periods of time. Connect prior knowledge and experiences to text.</p> <p>Writing W.9-10.2 Write informative/explanatory texts to examine and convey complex ideas, concepts, and information clearly and accurately through the effective selection, organization, and analysis of content.</p> <p>a. Organize information and ideas around a topic to plan and prepare to write.</p> <p>b. Introduce a topic; organize complex ideas, concepts, and information to make important connections and distinctions; include formatting, graphics, and multimedia when useful to aiding comprehension.</p> <p>c. Develop the topic with well chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience’s knowledge of the topic.</p>		<p>answer questions, pose questions, and complete various analysis charts.</p> <p>Grammar Workshops (I) Students will participate in grammar workshops where they will learn basic sentence structure while focusing on subjects and predicates.</p> <p>Critical Thinking Responses (I)</p> <ul style="list-style-type: none"> • 1-2-page responses based on specific skills and elements • Sample topics include conflict, literary devices, setting, author’s purpose and theme <p>Students use higher order thinking skills to draw conclusions about an author’s choices.</p> <p>Check for Understanding: Self-Tests (I) Throughout the unit, students will perform self-checks in order to assess their level of understanding with regards to key concepts and reading assignments. These self-tests will be used as a benchmark for teachers to determine if additional instruction is necessary.</p> <p>Timed Writing (I) Students will have 5 minutes to pre-write a speech given a prompt on the topic of the importance of cleaning up the community. Students will be expected to follow a</p>
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	<p>d. Use appropriate and varied transitions to link the major sections of the text, create cohesion, and clarify the relationships among complex ideas and concepts.</p> <p>e. Use precise language and domain-specific vocabulary to manage the complexity of the topic.</p> <p>f. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing.</p> <p>g. Provide a concluding statement or section that follows from and supports the information or explanation presented.</p> <p>h. Develop and strengthen writing as needed by revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience.</p> <p>W.9-10.4 Use digital tools and resources to produce, publish, and update individual or shared writing products, taking advantage of technology’s capacity to link to other information and to display information flexibly and dynamically.</p> <p>Speaking and Listening SL.9-10.2 Integrate multiple sources of information presented in diverse media or formats, evaluating the credibility and accuracy of each source.</p> <p>Language</p>		<p>logical format and use the skills they have acquired in the previous lessons. Students will be allowed 25 minutes to complete their written speech.</p> <p>Unit Assessment: Key Assignments (F) 1. Stage Direction Analysis “Romeo and Juliet” Students will complete a short, written response in which they identify and explain the impact of stage directions on a scene from Act 1 or 2 of Romeo and Juliet. They also need to explain how the scene could be read or understood differently with the absence of stage directions. Students will show mastery for the following objective(s): Identify elements of drama in a given act or scene; know and understand the context of period vocabulary and language.</p> <p>2. Conflict in Romeo and Juliet Storyboard Analysis Students will complete a storyboard graphic organizer for FOUR scenes from Acts 1 and 2 that portray some form of conflict. Students will show mastery for the following objective(s): infer the meaning of a word in a given text, especially as it relates to conflict in drama; Understand plot in a Shakespearean play.</p>
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	<p>L.9-10.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking; demonstrate proficiency within the 9-12 grammar continuum.</p> <p>L.9-10.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing; demonstrate proficiency within the 9-12 conventions continuum.</p> <p>L.9-10.6 Acquire and use accurately general academic and domain specific words and phrases, sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in developing vocabulary knowledge when considering a word or phrase important to comprehension or expression.</p> <p>WIDA ELD Standards Standard 1 – Social and Instructional Language English language learners communicate for social and instructional purposes within the school setting. Standard 2 – Language of Language Arts English language learners communicate information, ideas, and concepts necessary for academic success in the content area of language arts.</p>		<p>Unit Assessment: Test (F) Students will be assessed on concepts taught in the unit. Test questions will vary in length and style such as multiple-choice and critical-thinking short essay questions.</p>
Unit 5 Overview	North Carolina ELA Standards	Skills and Concepts	Assessments
UNIT 5: Reading Fiction: Elements of Drama	Reading: Literature RL.9-10.1 Cite strong and thorough textual	Literary Various types of nonfiction; how to read nonfiction; researching	<i>Informal (I) Formal (F)</i> Reader’s Workshop (I)

<p>Students will wrap up their study of the Drama genre by finishing their reading and analysis of William Shakespeare's Romeo and Juliet. They will focus largely on how constant conflict between complex characters helps to drive the plot to its tragic conclusions. Students will study the concepts of dramatic irony, pacing, suspense, and story structure to help them grasp a greater understanding of the conclusion of the play. In this unit, students put together a complex and rigorous essay structure. They will examine the themes surrounding character conflicts as they write an extended theme analysis essay using in-text citations, supportive evidence, and outside sources. Finally, they will be expected to learn how to revise and edit their own writing as they move from a rough draft and into a final draft composition.</p> <p>Instructional Unit Elements of Drama</p> <p>Objectives -Determine how elements such as structure, pacing, and other devices affect mood and tone in a play -Write a literary analysis in which the student determines and defends the theme of a text -Understand plot in a Shakespearean play -Analyze the themes in a Shakespearean play and organize the supporting evidence -Analyze how complex characters in conflict help to advance the plot or develop the theme of a play -Know and understand the context of period vocabulary and language</p> <p>Semester Essential Question</p>	<p>evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.</p> <p>RL.9-10.2 Determine a theme of a text and analyze in detail its development over the course of the text, including how it emerges and is shaped and refined by specific details; provide an objective summary of the text.</p> <p>RL.9-10.3 Analyze how complex characters develop over the course of a text, interact with other characters, and advance the plot or develop the theme.</p> <p>RL.9-10.4 Determine the meaning of words and phrases as they are used in the text; analyze the cumulative impact of specific word choices on meaning and tone.</p> <p>RL.9-10.5 Analyze how an author's choices concerning how to structure a text, order events within it, and manipulate time create effects such as mystery, tension, or surprise.</p> <p>RL.9-10.6 Analyze a particular perspective or cultural experience reflected in a work of literature from outside the United States, drawing on a wide reading of world literature.</p> <p>RL.9-10.9 Analyze how an author adapts source material in a specific work.</p> <p>RL.9-10.10 By the end of grade 9, read and understand literature within the 9-10 text complexity band proficiently and independently for</p>	<p>techniques; main idea; comparing biographical writing; persuasive speech writing; evaluate credibility</p> <p>Writing Business letter writing; expository essay writing; persuasive techniques</p> <p>Language/Grammar Latin root words; predicate nominatives; predicate adjectives; adverbs</p> <p>Grammar Focus Review of Grammar, Use of Parallelism Students will review their grammar learnings from the semester as they revise and edit their writing. Students will be expected to identify and use parallel structure in their final draft.</p>	<p>Students will reflect on how they have used reading strategies throughout the unit and list examples.</p> <p>Literary Response (I) For each selection that is read, students will interact with the content. They will answer questions, pose questions, and complete various analysis charts.</p> <p>Grammar Workshops (I) Students will participate in grammar workshops where they will learn basic sentence structure while focusing on adverbs and adjectives.</p> <p>Research and Technology Journal (I) Students will conduct research using technology to produce two journal entries each 1 page in length. Students will have prepared research questions to guide their technology-based research. The topics will be based on the previous readings. Students will analyze and evaluate the credibility of each source as well.</p> <p>Timed Writing (I) Students will write a timed 2-3-page essay after reading excerpts from unit texts. Students will analyze if they believe the author's points to be valid or not. Students will have 25 minutes to write their arguments.</p>
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<p>Is conflict necessary?</p> <p>Readings "Romeo and Juliet" by William Shakespeare (Acts 3-5)</p> <p>WIDA ELD Language Objectives: -Students will be able to identify predicate, nominatives, and adjectives by highlighting them in sample sentences. -Students will be able to agree or disagree about the effectiveness of persuasion techniques in selected texts in oral discussions with peers or teachers.</p>	<p>sustained periods of time. Connect prior knowledge and experiences to text.</p> <p>Writing W.9-10.1 Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence. a. Organize information and ideas around a topic to plan and prepare to write. b. Introduce precise claim(s), distinguish the claim(s) from alternate or opposing claims, and create an organization that establishes clear relationships among claim(s), counterclaims, reasons, and evidence. c. Develop claim(s) and counterclaims fairly, supplying evidence for each while pointing out the strengths and limitations of both in a manner that anticipates the audience's knowledge level and concerns. d. Use words, phrases, and clauses to link the major sections of the text, create cohesion, and clarify the relationships between claim(s) and reasons, between reasons and evidence, and between claim(s) and counterclaims. e. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing. f. Provide a concluding statement or section that follows from and</p>		<p>Check for Understanding: Self-Tests (I) Throughout the unit, students will perform self-checks in order to assess their level of understanding with regards to key concepts and reading assignments. These self-tests will be used as a benchmark for teachers to determine if additional instruction is necessary.</p> <p>Predicate (I) Students will identify predicate nominatives and predicate adjectives in example sentences. Students will also complete sentences using proper forms of predicate adjectives and predicate nominatives.</p> <p>Unit Assessment: Key Assignments (F) 1. Dramatic irony graphic organizers Students will complete a graphic organizer that helps them to identify and explain dramatic irony in Romeo and Juliet. Students will show mastery for the following objective(s): Determine how elements such as structure, pacing, and other devices affect mood and tone in a play; analyze how complex characters in conflict help to advance the plot or develop the theme of a play. 2. Rough draft of theme analysis Students will write a rough draft essay that outlines the conflict</p>
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	<p>supports the argument presented.</p> <p>g. Develop and strengthen writing as needed by revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience.</p> <p>W.9-10.2 Write informative/explanatory texts to examine and convey complex ideas, concepts, and information clearly and accurately through the effective selection, organization, and analysis of content.</p> <p>a. Organize information and ideas around a topic to plan and prepare to write.</p> <p>b. Introduce a topic; organize complex ideas, concepts, and information to make important connections and distinctions; include formatting, graphics, and multimedia when useful to aiding comprehension.</p> <p>c. Develop the topic with well chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience's knowledge of the topic.</p> <p>d. Use appropriate and varied transitions to link the major sections of the text, create cohesion, and clarify the relationships among complex ideas and concepts.</p> <p>e. Use precise language and domain-specific vocabulary to manage the complexity of the topic.</p>		<p>theme in Romeo and Juliet. Students will show mastery for the following objective(s): Write a literary analysis in which the student determines and defends the theme of a text; Understand plot in a Shakespearean play; Analyze the themes in a Shakespearean play and organize the supporting evidence; analyze how complex characters in conflict help to advance the plot or develop the theme of a play..</p> <p>3. Final draft of theme analysis</p> <p>Students will write a final draft essay that outlines the conflict theme in Romeo and Juliet. Students will show mastery for the following objective(s): Write a literary analysis in which the student determines and defends the theme of a text; Understand plot in a Shakespearean play; Analyze the themes in a Shakespearean play and organize the supporting evidence; analyze how complex characters in conflict help to advance the plot or develop the theme of a play.</p> <p>Unit Assessment: Test (F)</p> <p>Students will be assessed on concepts taught in the unit. Test questions will vary in length and style such as multiple-choice and critical-thinking short essay questions.</p>
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	<p>f. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing.</p> <p>g. Provide a concluding statement or section that follows from and supports the information or explanation presented.</p> <p>h. Develop and strengthen writing as needed by revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience.</p> <p>W.9-10.4 Use digital tools and resources to produce, publish, and update individual or shared writing products, taking advantage of technology's capacity to link to other information and to display information flexibly and dynamically.</p> <p><i>Speaking and Listening</i></p> <p>SL.9-10.3 Evaluate a speaker's point of view, reasoning, and use of evidence and rhetoric, identifying any fallacious reasoning or exaggerated or distorted evidence.</p> <p>SL.9-10.4 Present information, findings, and supporting evidence clearly, concisely, and logically such that listeners can follow the line of reasoning and the organization, development, substance, and style are appropriate to purpose, audience, and task.</p> <p><i>Language</i></p>		
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	<p>L.9-10.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking; demonstrate proficiency within the 9-12 grammar continuum.</p> <p>L.9-10.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing; demonstrate proficiency within the 9-12 conventions continuum.</p> <p>L.9-10.6 Acquire and use accurately general academic and domain specific words and phrases, sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in developing vocabulary knowledge when considering a word or phrase important to comprehension or expression.</p> <p>WIDA ELD Standards</p> <p>Standard 1 – Social and Instructional Language English language learners communicate for social and instructional purposes within the school setting.</p> <p>Standard 2 – Language of Language Arts English language learners communicate information, ideas, and concepts necessary for academic success in the content area of language arts.</p>		
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Unit 6 Overview	North Carolina ELA Standards	Skills and Concepts	Assessments
<p>UNIT 6: Exploring the Writing Process</p> <p>Students will begin the second semester of English 1 with a thorough review of Semester A learnings, and they will synthesize this information with an in-depth practice of the entire writing process. Students will use “Harrison Bergeron” to apply their previous semester’s learning. In part, the text will also serve as the beginning point for research writing. Students will hone their textual evidence gathering skills, and learn how to use in-text citations in MLA style. At the close of the unit, students will begin to move into argumentative writing and reading using the “Buck v. Bell” Supreme Court Ruling in two different formats. This is going to help set the tone for the semester’s essential question: How does the way information is delivered affect its meaning?</p> <p>Instructional Unit Writing for Purpose</p> <p>Objectives</p> <ul style="list-style-type: none"> -Provide an objective and unbiased summary of a given text -Use proper punctuation and complex sentence patterns in one’s own writing -Revise writing for content and grammar -Identify relevant textual evidence to support an analysis of a given text <p>Semester Essential Question How does the way information is delivered affect its meaning?</p> <p>Readings “Harrison Bergeron” by Kurt Vonnegut Buck v. Bell, 1927 (Supreme Court Case opinions AND</p>	<p>Reading: Literature RL.9-10.4 Determine the meaning of words and phrases as they are used in the text; analyze the cumulative impact of specific word choices on meaning and tone.</p> <p>Reading: Informational Text RI.9-10.2 Determine a central idea of a text and analyze its development over the course of the text, including how it emerges and is shaped and refined by specific details; provide an objective summary of the text.</p> <p>Writing W.9-10.2 Write informative/explanatory texts to examine and convey complex ideas, concepts, and information clearly and accurately through the effective selection, organization, and analysis of content.</p> <ul style="list-style-type: none"> a. Organize information and ideas around a topic to plan and prepare to write. b. Develop the topic with well-chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience’s knowledge of the topic c. Develop the topic with well-chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience’s knowledge of the topic. d. Use appropriate and varied transitions to link the major sections of the text, create cohesion, and clarify the relationships among complex ideas and concepts. 	<p>Literary Reading poetry, figurative language, imagery, reading fluently, and following technical directions</p> <p>Writing Research techniques, and using precise words and phrases</p> <p>Language/Grammar Prepositions and prepositional phrases</p> <p>Grammar Focus Review of grammar, revision of writing Students will review their grammar learnings from the semester as they revise and edit their writing.</p>	<p><i>Informal (I) Formal (F)</i></p> <p>Reader’s Workshop (I) Students will reflect on how they have used reading strategies throughout the unit and list examples.</p> <p>Literary Response (I) For each selection that is read, students will interact with the content. They will answer questions, pose questions, and complete various analysis charts.</p> <p>Grammar Workshops (I) Students will participate in grammar workshops where they will learn basic sentence structure while focusing on prepositions and prepositional phrases.</p> <p>Critical Thinking Responses (I) -1-2-page responses based on specific skills and elements -Sample topics include conflict, literary devices, setting, author’s purpose and theme -Students use higher order thinking skills to draw conclusions about an author’s choices.</p> <p>Check for Understanding: Self-Tests (I) Throughout the unit, students will perform self-checks in order to assess their level of understanding with regards to key concepts and reading assignments. These self-tests will be used as a benchmark for teachers to determine if additional instruction is necessary.</p> <p>Reading Fluency (I) Students will read the reading selections in this</p>

<p>narrative from Bill Bryson’s One Summer: America, 1927) Hunger Games, by Suzanne Collins</p> <p>WIDA ELD Language Objectives -Students will classify and distinguish narrative components using a story map graphic organizer. -Students will construct multi-paragraph writing by applying precise vocabulary and compound or complex sentence structures to explain ideas.</p>	<p>e. Use precise language and domain-specific vocabulary to manage the complexity of the topic. f. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing. g. Provide a concluding statement or section that follows from and supports the information or explanation presented. h. Develop and strengthen writing as needed by revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience.</p> <p>W.9-10.4 Use digital tools and resources to produce, publish, and update individual or shared writing products, taking advantage of technology’s capacity to link to other information and to display information flexibly and dynamically.</p> <p>W.9-10.6 Gather relevant information from multiple authoritative print and digital sources, using advanced searches effectively; assess the usefulness of each source in answering the research question; integrate information into the text selectively to maintain the flow of ideas, avoiding plagiarism and following a standard format for citation.</p> <p>Speaking and Listening SL.9-10.4 Present information, findings, and supporting evidence clearly, concisely, and logically such that listeners can follow the line of reasoning and the organization, development, substance, and style are appropriate to purpose, audience, and task.</p> <p>Language</p>		<p>unit aloud to increase fluency. Students will use a smooth rhythm and pause in certain places, although there may be no punctuation for it.</p> <p>Story Map (I) Students will organize information from the reading selection “The Hunger Games,” by Suzanne Collins, into a story map. Students will identify the author, setting (place and time), characters, problem, main events, the climax and the resolution of the selection.</p> <p>Unit Assessment: Key Assignments (F) 1. Revision of an extended piece of writing Students will rewrite a piece of text given to them, concentrating on sentence structure, proper punctuation, and subject/verb agreement. Students will show mastery for the following objective(s): Use proper punctuation and complex sentence patterns in one’s own writing; Revise writing for content and grammar. 2. Analysis writing of a court case from 2 varying perspectives Students will produce a short, written analysis of the same court case, but from 2 varying perspectives. They will concentrate on objective summarization and revision of writing. Students will show mastery for the following objective(s): Provide an objective and unbiased summary of a given text; Use proper punctuation and complex sentence patterns in one’s own writing; Revise writing for content and grammar.</p>
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	<p>L.9-10.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking; demonstrate proficiency within the 9-12 grammar continuum.</p> <p>L.9-10.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing; demonstrate proficiency within the 9-12 conventions continuum.</p> <p>L.9-10.6 Acquire and use accurately general academic and domain specific words and phrases, sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in developing vocabulary knowledge when considering a word or phrase important to comprehension or expression.</p> <p>WIDA ELD Standards Standard 1 – Social and Instructional Language English language learners communicate for social and instructional purposes within the school setting. Standard 2 – Language of Language Arts English language learners communicate information, ideas, and concepts necessary for academic success in the content area of language arts.</p>		<p>Unit Assessment: Test (F) Students will be assessed on concepts taught in the unit. Test questions will vary in length and style such as multiple-choice and critical-thinking short essay questions.</p>
Unit 7 Overview	North Carolina ELA Standards	Skills and Concepts	Assessments
<p>UNIT 7: Analyzing Poetry In this unit of study students will explore the way in which we communicate through poetry. In particular, students will read through numerous poems that are specially designed around the freedom of speech and protest. Students will be exposed to the likes of Langston Hughes, Carl Sandburg, Pat More, Alice Walker among others as they search for meaning, intent, and</p>	<p>Reading: Literature RI.9-10.2 Determine a central idea of a text and analyze its development over the course of the text, including how it emerges and is shaped and refined by specific details; provide an objective summary of the text. RI.9-10.4 Determine the meaning of words and phrases as they are used in a text; analyze the cumulative impact</p>	<p>Literary Reading poetry, narrative poetry, rhyme and meter, paraphrase, dialogue, and main idea</p> <p>Writing Research techniques, description, response to literature essay writing, free verse poetry, and comparing lyric poetry</p>	<p><i>Informal (I) Formal (F)</i></p> <p>Reader’s Workshop (I) Students will reflect on how they have used reading strategies throughout the unit and list examples.</p> <p>Literary Response (I) For each selection that is read, students will interact with the content. They will answer questions, pose</p>

<p>a common theme throughout. Students will do an in-depth study of figurative language as they look for symbolism, metaphors, allusion, and imagery in many of the selected text readings. Additionally, students will learn how to read poetry with inflection, with voice, and with fluency. Throughout the unit, students will engage in the argumentative style of writing, with their final assignment being an argumentative essay in which they try to prove the interconnectedness of the theme running throughout all the readings.</p> <p>Instructional Unit The Power of Protest Poetry</p> <p>Objectives -Analyze the impact of specific word choices on tone or mood in a given poem -Cite textual evidence to support analysis of poetry -Determine the theme or central idea of a poem -Explain the use of figurative language and multiple meaning words in various poems -Identify and defend the theme of a given poem</p> <p>Semester Essential Question How does the way information is delivered affect its meaning?</p> <p>Readings "Sympathy;" Paul Laurence Dunbar "I look at the world;" Langston Hughes "I Am the People, the Mob;" Carl Sandberg "A Voice;" Pat Mora "Women;" Alice Walker "If We Must Die;" Claude McKay "The Sign in My Father's Hand;" Martin Espada "Still I Rise"; Maya Angelou "Home" Warsan Shire "Caged Bird" by Maya Angelou</p>	<p>of specific word choices on meaning and tone. RI.9-10.7 Analyze various accounts of a subject told in different mediums, determining which details are emphasized in each account.</p> <p>Writing W.9-10.2 Write informative/explanatory texts to examine and convey complex ideas, concepts, and information clearly and accurately through the effective selection, organization, and analysis of content.</p> <p>a. Organize information and ideas around a topic to plan and prepare to write. b. Introduce a topic; organize complex ideas, concepts, and information to make important connections and distinctions; include formatting, graphics, and multimedia when useful to aiding comprehension. c. Develop the topic with well chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience's knowledge of the topic. d. Use appropriate and varied transitions to link the major sections of the text, create cohesion, and clarify the relationships among complex ideas and concepts. e. Use precise language and domain-specific vocabulary to manage the complexity of the topic. f. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing. g. Provide a concluding statement or section that follows from and supports the information or explanation presented.</p>	<p>Language/Grammar Infinitives and infinitive phrases</p>	<p>questions, and complete various analysis charts.</p> <p>Grammar Workshops (I) Students will participate in grammar workshops where they will learn basic sentence structure while focusing on infinitives.</p> <p>Figurative Language (I) Students will identify similes and metaphors in the reading selections in this unit. Students will explain the meaning of each figure of speech and interpret its meaning in the selection.</p> <p>Infinitives (I) Students will identify infinitives and infinitive phrases and provide their function in the given example sentences. Students will also rewrite the sentence examples using a new and different infinitive or infinitive phrase.</p> <p>Paraphrasing (I) Students will rephrase the reading selections within this unit in their own words. Students will keep the meaning of the selection, but put the words into a simpler form.</p> <p>Rhyme and Meter (I) Students will analyze the rhyme scheme in the reading selections and choose one to write their own poem with. Students will identify the rhyme scheme and use it to create their own poem on a chosen topic using specific images and detail.</p> <p>Critical Thinking Responses (I) -1-2-page responses based on specific skills and elements -Sample topics include conflict, literary devices,</p>
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<p>“In the Kitchen With My Mother” Erin McIntosh Selected Works from Nikki Giovanni Hunger Games, by Suzanne Collins</p> <p>WIDA ELD Language Objectives -Students will identify a rhyme scheme by using a variety of adjectives and adverbs to construct an original poem. -Students will identify where the pauses and beats are in a poem by repeating the poem aloud with correct pausing and pronunciation.</p>	<p>h. Develop and strengthen writing as needed by revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience.</p> <p>W.9-10.4 Use digital tools and resources to produce, publish, and update individual or shared writing products, taking advantage of technology’s capacity to link to other information and to display information flexibly and dynamically.</p> <p>W.9-10.5 Conduct short as well as more sustained research projects to answer a question (including a self-generated question) or solve a problem; narrow or broaden the inquiry when appropriate; synthesize multiple sources on the subject, demonstrating understanding of the subject under investigation.</p> <p>W.9-10.6 Gather relevant information from multiple authoritative print and digital sources, using advanced searches effectively; assess the usefulness of each source in answering the research question; integrate information into the text selectively to maintain the flow of ideas, avoiding plagiarism and following a standard format for citation.</p> <p>Speaking and Listening SL.9-10.1 Initiate and participate effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grades 9–10 topics, texts, and issues, building on others’ ideas and expressing their own clearly and persuasively.</p> <p>a. Come to discussions prepared, having read and researched material under study; explicitly draw on that preparation by referring to evidence from texts and other</p>		<p>setting, author’s purpose and theme -Students use higher order thinking skills to draw conclusions about an author’s choices.</p> <p>Rhyme and Meter (I) Students will analyze the rhyme scheme in the reading selections and choose one to write their own poem with. Students will identify the rhyme scheme from the chosen reading selection and use it to create their own poem on any topic using specific images and detail.</p> <p>Free Verse Poem (I) Students will write a free verse poem with a topic of their choice. Students will brainstorm before writing using feelings, memories, vivid adjectives, comparisons and descriptions of the topic. Students will demonstrate their writing ability through organization, word choice and creativity.</p> <p>Check for Understanding: Self-Tests (I) Throughout the unit, students will perform self-checks in order to assess their level of understanding with regards to key concepts and reading assignments. These self-tests will be used as a benchmark for teachers to determine if additional instruction is necessary.</p> <p>Response to Literature (F) Writing a Response to Literature Students will write a 2 – 3-page essay examining the internal and external conflicts of the main character Katniss in the novel, Hunger Games. Students will cite examples from the book including</p>
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	<p>research on the topic or issue to stimulate a thoughtful, well-reasoned exchange of ideas.</p> <p>b. Work with peers to set rules for collegial discussions and decision-making, clear goals and deadlines, and individual roles as needed.</p> <p>c. Propel conversations by posing and responding to questions that relate the current discussion to broader themes or larger ideas; actively incorporate others into the discussion; and clarify, verify, or challenge ideas and conclusions.</p> <p>d. Respond thoughtfully to diverse perspectives, summarize points of agreement and disagreement, and, when warranted, qualify or justify their own views and understanding and make new connections in light of the evidence and reasoning presented.</p> <p>Language</p> <p>L.9-10.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking; demonstrate proficiency within the 9-12 grammar continuum.</p> <p>L.9-10.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing; demonstrate proficiency within the 9-12 conventions continuum.</p> <p>L.9-10.6 Acquire and use accurately general academic and domain specific words and phrases, sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in developing vocabulary knowledge when considering a word or phrase important to comprehension or expression.</p> <p>WIDA ELD Standards</p>		<p>specific events and quotes to explain their ideas. Students will demonstrate their knowledge of paragraph and essay writing by incorporating a topic sentence, supporting sentences, and a closing sentence while using descriptive words, creativity, originality, and organization in their writing.</p> <p>Unit Assessment: Key Assignments (F)</p> <p>1. Creation of own protest poem around a current issue Students will produce a written protest poem of their own creation. They are expected to use figurative language and other poetic devices. Students will show mastery in explaining the use of figurative language and multiple meaning words in various poems.</p> <p>2. Argumentative Essay arguing a connected theme from poems Students will produce a written analysis of theme in poetry that is connected to at least 2 poems read in the unit. Students will show mastery for the following objective(s):</p> <ul style="list-style-type: none"> -Analyze the impact of specific word choices on tone or mood in a given poem -Cite textual evidence to support analysis of poetry -Determine the theme or central idea of a poem -Identify and defend the theme of a given poem. <p>Unit Assessment: Test (F) Students will be assessed on concepts taught in the unit. Test questions will vary in length and style such as multiple-choice and critical-thinking short essay questions.</p>
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	<p>Standard 1 – Social and Instructional Language English language learners communicate for social and instructional purposes within the school setting.</p> <p>Standard 2 – Language of Language Arts English language learners communicate information, ideas, and concepts necessary for academic success in the content area of language arts.</p>		
Unit 8 Overview	North Carolina ELA Standards	Skills and Concepts	Assessments
<p>UNIT 8: Elements of Nonfiction Students will begin an in-depth exploration of nonfiction writing with the start of this unit. Looking deeper into the essential question – “How does the way information is delivered affect its meaning?” – students will start to see how narratives designed to tell truths and deliver agendas can affect the way in which an individual views society as a whole, and those that live closely around them. Students will learn how to determine the central idea of a text, and how the author’s purpose helps to determine what the reader is supposed to infer. Students will begin to look at various rhetorical strategies on a limited level, while beginning to master in-text citation to better support their claims during the expository writing process. Additionally, students will begin to compare the politics and information structures most prevalent in <i>The Hunger Games</i> to the readings in this unit and the next.</p> <p>Instructional Unit</p>	<p>Reading: Informational Text RI.9-10.2 Determine a central idea of a text and analyze its development over the course of the text, including how it emerges and is shaped and refined by specific details; provide an objective summary of the text. RI.9-10.3 Analyze how the author unfolds an analysis or series of ideas or events including the order in which the points are made, how they are introduced and developed, and the connections that are drawn between them. RI.9-10.5 Analyze how an author’s ideas or claims are developed and refined by particular sentences, paragraphs, or larger portions of a text.</p> <p>Writing W.9-10.2 Write informative/explanatory texts to examine and convey complex ideas, concepts, and information clearly and accurately through the effective selection, organization, and analysis of content.</p>	<p>Literary Reading plays, summarizing, dialogue, stage directions, blank verse, and dramatic speeches</p> <p>Writing How-to essay writing</p> <p>Language/Grammar Participles and participial phrases, gerunds and gerund phrases, Latin prefixes, and Latin root words</p>	<p><i>Informal (I) Formal (F)</i></p> <p>Reader’s Workshop (I) Students will reflect on how they have used reading strategies throughout the unit and list examples.</p> <p>Literary Response (I) For each selection that is read, students will interact with the content. They will answer questions, pose questions, and complete various analysis charts.</p> <p>Grammar Workshops (I) Students will participate in grammar workshops where they will learn basic sentence structure while focusing on participles, participial phrases, gerunds, and gerund phrases.</p> <p>Critical Thinking Responses (I) -1-2-page responses based on specific skills and elements -Sample topics include conflict, literary devices, setting, author’s purpose and theme</p>

<p>Elements of Nonfiction, Part 1</p> <p>Objectives -Determine the central idea of a text -Develop a written text in which they use concrete details, quotations, and other information appropriate to the topic -Gather evidence to support the central idea of a text -Identify relevant textual evidence to support an analysis of a given text -Know and understand the context of domain specific words and language</p> <p>Semester Essential Question How does the way information is delivered affect its meaning?</p> <p>Readings “Single Room, Earth View” by Sally Ride “A Childhood in Politics” essay from Jessica Ceballos “Before Hip Hop was Hip Hop” by Rebecca Walker Hunger Games, by Suzanne Collins</p> <p>WIDA ELD Language Objectives -Students will explain how they use reading strategies by summarizing their processes in order to link major sections of a text. -Students will paraphrase facts and key points about a topic, as they utilize technology in their research.</p>	<p>a. Organize information and ideas around a topic to plan and prepare to write. b. Introduce a topic; organize complex ideas, concepts, and information to make important connections and distinctions; include formatting, graphics, and multimedia when useful to aiding comprehension. c. Develop the topic with well chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience’s knowledge of the topic. d. Use appropriate and varied transitions to link the major sections of the text, create cohesion, and clarify the relationships among complex ideas and concepts. e. Use precise language and domain-specific vocabulary to manage the complexity of the topic. f. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing. g. Provide a concluding statement or section that follows from and supports the information or explanation presented. h. Develop and strengthen writing as needed by revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience. W.9-10.4 Use digital tools and resources to produce, publish, and update individual or shared writing products, taking advantage of technology’s capacity to link to other information and to display information flexibly and dynamically. W.9-10.5 Conduct short as well as more sustained research projects to answer a</p>		<p>Students use higher order thinking skills to draw conclusions about an author’s choices.</p> <p>Check for Understanding: Self-Tests (I) Throughout the unit, students will perform self-checks in order to assess their level of understanding with regards to key concepts and reading assignments. These self-tests will be used as a benchmark for teachers to determine if additional instruction is necessary.</p> <p>How-To Essay Writing (F) Students will write a 5-paragraph essay which will supply step-by-step instructions for a given task. Students will put together specific and factual information that will provide a logical process to the desired outcome. The essay will include examples and definitions that will answer anticipated questions from the reader.</p> <p>Unit Assessment: Key Assignments (F) 1. Expository Response focusing on claims and citing evidence Students will produce a 3-4 paragraph written response to a prompt, in which they will need to cite and/or reference specific textual evidence. The will practice building a claim and supporting it with relevant evidence. Students will show mastery for the following objective(s): -Determine the central idea of a text -Develop a written text in which they use concrete details, quotations, and other information appropriate to the topic -Gather evidence to support the central idea of a text</p>
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	<p>question (including a self-generated question) or solve a problem; narrow or broaden the inquiry when appropriate; synthesize multiple sources on the subject, demonstrating understanding of the subject under investigation.</p> <p>Speaking and Listening SL.9-10.1 Initiate and participate effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grades 9–10 topics, texts, and issues, building on others’ ideas and expressing their own clearly and persuasively.</p> <p>a. Come to discussions prepared, having read and researched material under study; explicitly draw on that preparation by referring to evidence from texts and other research on the topic or issue to stimulate a thoughtful, well-reasoned exchange of ideas.</p> <p>b. Work with peers to set rules for collegial discussions and decision-making, clear goals and deadlines, and individual roles as needed.</p> <p>c. Propel conversations by posing and responding to questions that relate the current discussion to broader themes or larger ideas; actively incorporate others into the discussion; and clarify, verify, or challenge ideas and conclusions.</p> <p>d. Respond thoughtfully to diverse perspectives, summarize points of agreement and disagreement, and, when warranted, qualify or justify their own views and understanding and make new connections in light of the evidence and reasoning presented.</p> <p>SL.9-10.4 Present information, findings, and supporting evidence clearly, concisely, and logically such that listeners can follow the line of reasoning</p>		<p>-Identify relevant textual evidence to support an analysis of a given text.</p> <p>2. Narrative Response focusing on comparing and contrasting</p> <p>Students will produce a narrative text that demonstrates their ability to compare and contrast central ideas, all while gathering evidence that supports their analysis. A special focus will be on proper use and understanding of domain language. Students will show mastery for the following objective(s):</p> <ul style="list-style-type: none"> -Gather evidence to support the central idea of a text -Identify relevant textual evidence to support an analysis of a given text -Know and understand the context of domain specific words and language <p>Unit Assessment: Test (F)</p> <p>Students will be assessed on concepts taught in the unit. Test questions will vary in length and style such as multiple-choice and critical-thinking short essay questions.</p>
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	<p>and the organization, development, substance, and style are appropriate to purpose, audience, and task.</p> <p>Language L.9-10.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking; demonstrate proficiency within the 9-12 grammar continuum. L.9-10.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing; demonstrate proficiency within the 9-12 conventions continuum. L.9-10.6 Acquire and use accurately general academic and domain specific words and phrases, sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in developing vocabulary knowledge when considering a word or phrase important to comprehension or expression.</p> <p>WIDA ELD Standards Standard 1 – Social and Instructional Language English language learners communicate for social and instructional purposes within the school setting. Standard 2 – Language of Language Arts English language learners communicate information, ideas, and concepts necessary for academic success in the content area of language arts.</p>		
Unit 9 Overview	North Carolina ELA Standards	Skills and Concepts	Assessments
<p>UNIT 9: Elements of Nonfiction Students will expand their perspectives of how information is disseminated and interpreted by diving into the spoken word. This entire unit will surround how speech and media has influenced the way in</p>	<p>Reading: Informational Text RI.9-10.3 Analyze how the author unfolds an analysis or series of ideas or events including the order in which the points are made, how they are introduced and developed,</p>	<p>Literary Reading a play, summarizing, dramatic irony, tragedy and motive, evaluation of sources, analyzing functional and</p>	<p><i>Informal (I) Formal (F)</i> Reader’s Workshop (I) Students will reflect on how they have used reading strategies throughout the unit and list examples.</p>

<p>which Americans, as well as the rest of the world, live their lives. Students will read and analyze some key historical speeches, and they'll listen to some relevant podcasts, view some teen-centric vlogs, and explore other realms of multimedia that impact their lives. All throughout this process, they will be practicing and mastering such concepts as rhetorical devices, audience, and speaker's purpose. When they get to writing about all of these mediums, students will be practicing the art of developing counterclaims, which they will have to use in the final unit for their research project.</p> <p>Instructional Unit Elements of Nonfiction, Part 2</p> <p>Objectives -Understand how sequence and structure support an argument -Identify rhetorical devices, appeals, and point of view in a text -Revise writing for content and grammar -Write an argument with supportive evidence -Analyze the impact of specific word choices on an argument -Explain how an argument progresses in a text -Know and understand the context of domain specific words and language</p> <p>Semester Essential Question How does the way information is delivered affect its meaning?</p> <p>Readings "There is Longing" Speech, Chief Dan George "Glory and Hope" Speech, Nelson Mandela "Inaugural Address, 1933" Speech, Franklin Delano Roosevelt "I Have a Dream," Speech, Dr. Martin Luther King, Jr. Hunger Games, by Suzanne Collins</p>	<p>and the connections that are drawn between them.</p> <p>Writing W.9-10.1 Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence. a. Organize information and ideas around a topic to plan and prepare to write. b. Introduce precise claim(s), distinguish the claim(s) from alternate or opposing claims, and create an organization that establishes clear relationships among claim(s), counterclaims, reasons, and evidence. c. Develop claim(s) and counterclaims fairly, supplying evidence for each while pointing out the strengths and limitations of both in a manner that anticipates the audience's knowledge level and concerns. d. Use words, phrases, and clauses to link the major sections of the text, create cohesion, and clarify the relationships between claim(s) and reasons, between reasons and evidence, and between claim(s) and counterclaims. e. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing. f. Provide a concluding statement or section that follows from and supports the argument presented. h. Develop and strengthen writing as needed by revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience. W.9-10.2 Write informative/explanatory texts to examine and convey complex ideas, concepts, and information clearly and</p>	<p>expository texts, and archetypal themes</p> <p>Writing Persuasive letter writing, and creating a multimedia presentation; comparing literary archetypal themes</p> <p>Language/Grammar Concept review and Latin prefixes</p>	<p>Literary Response (I) For each selection that is read, students will interact with the content. They will answer questions, pose questions, and complete various analysis charts.</p> <p>Critical Thinking Responses (I) -1-2-page responses based on specific skills and elements -Sample topics include conflict, literary devices, setting, author's purpose and theme -Students use higher order thinking skills to draw conclusions about an author's choices.</p> <p>Check for Understanding: Self-Tests (I) Throughout the unit, students will perform self-checks in order to assess their level of understanding with regards to key concepts and reading assignments. These self-tests will be used as a benchmark for teachers to determine if additional instruction is necessary.</p> <p>Summarizing (I) Students will summarize unit texts by using the steps involved in writing an essay. Students will organize their essay into five paragraphs while focusing on topic sentences, supporting sentences and closing sentences.</p> <p>Evaluate Sources (I) Students will analyze web sources using real-life websites. Students will answer questions about the main idea, author's arguments, evidence verification, sponsorship of the site and source date.</p> <p>Unit Assessment: Key Assignments (F)</p>
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<p>WIDA ELD Language Objectives</p> <p>-Students will explain how an author uses source material by effectively using comparative language in a compare and contrast essay.</p> <p>-Students will demonstrate their proficiency with English Grammar through discussing their use of English grammar and conventions in an essay, participating in a short verbal conference with a teacher, and providing responses that are relevant and on-topic.</p>	<p>accurately through the effective selection, organization, and analysis of content.</p> <p>a. Organize information and ideas around a topic to plan and prepare to write.</p> <p>b. Introduce a topic; organize complex ideas, concepts, and information to make important connections and distinctions; include formatting, graphics, and multimedia when useful to aiding comprehension.</p> <p>c. Develop the topic with well chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience's knowledge of the topic.</p> <p>d. Use appropriate and varied transitions to link the major sections of the text, create cohesion, and clarify the relationships among complex ideas and concepts.</p> <p>e. Use precise language and domain-specific vocabulary to manage the complexity of the topic.</p> <p>f. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing.</p> <p>g. Provide a concluding statement or section that follows from and supports the information or explanation presented.</p> <p>h. Develop and strengthen writing as needed by revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience.</p> <p>Language L.9-10.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking; demonstrate</p>		<p>1. Analysis of "I have a Dream" speech, point out rhetorical devices (orally and written)</p> <p>Students will analyze Dr. King's "I Have a Dream" speech for use of rhetorical devices. Their analysis essay will need to demonstrate the students' argument skills as they consider certain appeals and points of view. Students will show mastery for the following objective(s): Understand how sequence and structure support an argument; Identify rhetorical devices, appeals, and point of view in a text; Analyze the impact of specific word choices on an argument.</p> <p>2. Summary of Podcast learnings</p> <p>Students will summarize their learning on podcasting through an expository essay in which they debate the power of communicating information through auditory means. A special focus will be on proper use and understanding of domain language. Students will show mastery for the following objective(s): Explain how an argument progresses in a text; Know and understand the context of domain specific words and language; Identify rhetorical devices, appeals, and point of view in a text.</p> <p>Unit Assessment: Test (F)</p> <p>Students will be assessed on concepts taught in the unit. Test questions will vary in length and style such as multiple-choice and critical-thinking short essay questions.</p>
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	<p>proficiency within the 9-12 grammar continuum.</p> <p>L.9-10.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing; demonstrate proficiency within the 9-12 conventions continuum.</p> <p>L.9-10.4 Determine and/or clarify the meaning of unknown and multiple-meaning words and phrases based on grades 9–10 reading and content, choosing flexibly from a range of strategies: context clues, word parts, word relationships, and reference materials.</p> <p>L.9-10.6 Acquire and use accurately general academic and domain specific words and phrases, sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in developing vocabulary knowledge when considering a word or phrase important to comprehension or expression.</p> <p>WIDA ELD Standards Standard 1 – Social and Instructional Language English language learners communicate for social and instructional purposes within the school setting. Standard 2 – Language of Language Arts English language learners communicate information, ideas, and concepts necessary for academic success in the content area of language arts.</p>		
<p>Unit 10 Overview</p>	<p>North Carolina ELA Standards</p>	<p>Skills and Concepts</p>	<p>Assessments</p>
<p>UNIT 10: The Research Process Students will assimilate much of their semester’s learning into a final research project. Students will make a claim as to the most impactful medium of communication, and deliver their claim and supporting evidence in that medium (e.g., if</p>	<p>Reading: Informational Text RI.9-10.2 Determine a central idea of a text and analyze its development over the course of the text, including how it emerges and is shaped and refined by specific details; provide an objective summary of the text.</p>	<p>Literary Epic heroes, epics and folktales, theme, historical and cultural context</p> <p>Writing</p>	<p><i>Informal (I) Formal (F)</i></p> <p>Reader’s Workshop (I) Students will reflect on how they have used reading strategies throughout the unit and list examples.</p> <p>Literary Response (I)</p>

<p>it is a speech, then their research project takes the form of a speech). Students will create a bibliography that demonstrates their knowledge of the MLA style, as well as the level and expanse of their research.</p> <p>Instructional Unit The Research Project</p> <p>Objectives</p> <ul style="list-style-type: none"> -Conduct academic research for a specific prompt or question (gathering and synthesizing research) -Use proper punctuation and complex sentence patterns in one’s own writing -Revise writing for content and grammar -Write an argument that includes strong evidence and counter argument -Demonstrate their ability to avoid plagiarism through proper citing of evidence in a standardized format <p>Semester Essential Question How does the way information is delivered affect its meaning?</p> <p>Readings “The Undercover Parenly” by Harlan Coben “Big Brother Meets Big Mother” by Ellen Goodman Purdue OWL website</p> <p>WIDA ELD Language Objectives</p> <ul style="list-style-type: none"> -Students will determine the central idea of a text and analyze its development by illustrating the 4 major developing points in a comic strip. -Students will use semicolons and colons correctly in a research paper and works cited page. 	<p>RI.9-10.3 Analyze how the author unfolds an analysis or series of ideas or events including the order in which the points are made, how they are introduced and developed, and the connections that are drawn between them.</p> <p>Writing W.9-10.3 Write narratives to develop real or imagined experiences or events using effective technique, well-chosen details, and well-structured event sequences.</p> <ul style="list-style-type: none"> a. Organize information and ideas around a topic to plan and prepare to write. b. Engage and orient the reader by setting out a problem, situation, or observation, establishing one or multiple point(s) of view, and introducing a narrator and/or characters; create a smooth progression of experiences or events. c. Use narrative techniques, such as dialogue, pacing, description, reflection, and multiple plot lines, to develop experiences, events, and/or characters. d. Use a variety of techniques to sequence events so that they build on one another to create a coherent whole. e. Use precise words and phrases, telling details, and sensory language to convey a vivid picture of the experiences, events, setting, and/or characters. f. Provide a conclusion that follows from and reflects on what is experienced, observed, or resolved over the course of the narrative. h. Develop and strengthen writing as needed by revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience. <p>W.9-10.5 Conduct short as well as more sustained</p>	<p>Bibliography, primary sources, secondary sources, outline</p> <p>Language/Grammar Commas, dashes, colons, semicolons, and ellipsis points</p>	<p>For each selection that is read, students will interact with the content. They will answer questions, pose questions, and complete various analysis charts.</p> <p>Grammar Workshops (I) Students will participate in grammar workshops where they will learn basic sentence structure while focusing on commas, dashes, colons, semicolons, and ellipsis points.</p> <p>Writing Conferences (I) Before each writing the final draft of a major writing assignment, students will participate in a writing conference with the teacher, who will give oral and written feedback that the students will use to revise their drafts. Conferencing will repeat until the assignment has reached a satisfactory level of proficiency.</p> <p>Critical Thinking Responses (I) -1-2-page responses based on specific skills and elements -Sample topics include conflict, literary devices, setting, author’s purpose and theme -Students use higher order thinking skills to draw conclusions about an author’s choices.</p> <p>Check for Understanding: Self-Tests (I) Throughout the unit, students will perform self-checks in order to assess their level of understanding with regards to key concepts and reading assignments. These self-tests will be used as a benchmark for teachers to determine if additional instruction is necessary.</p>
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	<p>research projects to answer a question (including a self-generated question) or solve a problem; narrow or broaden the inquiry when appropriate; synthesize multiple sources on the subject, demonstrating understanding of the subject under investigation.</p> <p>W.9-10.6 Gather relevant information from multiple authoritative print and digital sources, using advanced searches effectively; assess the usefulness of each source in answering the research question; integrate information into the text selectively to maintain the flow of ideas, avoiding plagiarism and following a standard format for citation.</p> <p>Speaking and Listening</p> <p>SL.9-10.1 Initiate and participate effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grades 9–10 topics, texts, and issues, building on others’ ideas and expressing their own clearly and persuasively.</p> <p>a. Come to discussions prepared, having read and researched material under study; explicitly draw on that preparation by referring to evidence from texts and other research on the topic or issue to stimulate a thoughtful, well-reasoned exchange of ideas.</p> <p>b. Work with peers to set rules for collegial discussions and decision-making, clear goals and deadlines, and individual roles as needed.</p> <p>c. Propel conversations by posing and responding to questions that relate the current discussion to broader themes or larger ideas; actively incorporate others into the discussion; and clarify, verify, or challenge ideas and conclusions.</p>		<p>Unit Assessment: Key Assignments (F)</p> <p>1. Undercover Parent Argumentative Essay (with counterclaims)</p> <p>Students will write a rough draft and final draft argumentative essay in which they pick a claim about undercover parenting and support it through citing specific, textual evidence. Students will show mastery for the following objective(s):</p> <ul style="list-style-type: none"> -Use proper punctuation and complex sentence patterns in one’s own writing -Revise writing for content and grammar -Write an argument that includes strong evidence and counter argument -Demonstrate their ability to avoid plagiarism through proper citing of evidence in a standardized format <p>2. Research Bibliography</p> <p>Students will produce a bibliography in MLA style (not annotated) that demonstrates their knowledge and mastery of putting together their research sources. Students will show mastery for the following objective(s):</p> <ul style="list-style-type: none"> -Conduct academic research for a specific prompt or question (gathering and synthesizing research) -Demonstrate their ability to avoid plagiarism through proper citing of evidence in a standardized format <p>3. Research Project</p> <p>Students will pull together a research project in which they put together a claim arguing the most impactful medium of dispersing information, and then present in that medium. Students are expected to conduct research, properly cite the research, and present their findings.</p>
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	<p>d. Respond thoughtfully to diverse perspectives, summarize points of agreement and disagreement, and, when warranted, qualify or justify their own views and understanding and make new connections in light of the evidence and reasoning presented.</p> <p>Language L.9-10.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking; demonstrate proficiency within the 9-12 grammar continuum. L.9-10.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing; demonstrate proficiency within the 9-12 conventions continuum. L.9-10.6 Acquire and use accurately general academic and domain specific words and phrases, sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in developing vocabulary knowledge when considering a word or phrase important to comprehension or expression.</p> <p>WIDA ELD Standards Standard 1 – Social and Instructional Language English language learners communicate for social and instructional purposes within the school setting. Standard 2 – Language of Language Arts English language learners communicate information, ideas, and concepts necessary for academic success in the content area of language arts.</p>		<p>Students will show mastery for the following objective(s):</p> <ul style="list-style-type: none"> -Conduct academic research for a specific prompt or question (gathering and synthesizing research) -Use proper punctuation and complex sentence patterns in one’s own writing -Revise writing for content and grammar -Write an argument that includes strong evidence and counter argument <p>Demonstrate their ability to avoid plagiarism through proper citing of evidence in a standardized format</p> <p>Unit Assessment: Test (F) Students will be assessed on concepts taught in the unit. Test questions will vary in length and style such as multiple-choice and critical-thinking short essay questions.</p>
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Appendix C: 9-12 Core Content Electives

Pathways In Education-North Carolina

Appendix C: 9-12 Core Content Electives. Provide a visual description of what courses (both core content and electives) will be offered at the charter high school to ensure students meet the proposed charter school's graduation requirements. Please ensure the projected staff and budget aligns with the course offerings.

Curriculum at Pathways In Education closely follows the graduation requirements as set forth by the State of North Carolina. Working within these guidelines, teachers and support staff work with students to craft a personalized learning experience.

Please note the Future-Ready Core graduation requirements upheld by PIE-North Carolina:

- 4 credits English: English I, English II, English III, English IV
- 4 credits Mathematics: Math I, Math II, Math III, 4th Math Course aligned to student's post-secondary plans
- 3 credits Science: A physical science course, Biology, Earth/Environmental Science
- 4 credits Social Studies: American History, Civics, Economics, World History, an additional social studies course
- 2 credits World Language: not required for high school graduation but required for admission to a university in the UNC system
- 1 credit Health/ Physical Education
- 6 credits electives/ other requirements:
 - 2 elective credits of any combination of CTE, Arts Education, or World Languages
 - 4 elective credits strongly recommended from CTE, JROTC, Arts Education, or any subject area

Please note the Future-Ready Occupational graduation requirements upheld by PIE-North Carolina:

- 4 credits English: English I, English II, English III, English IV
- 3 credits Mathematics: Introduction to Mathematics, Math 1, Financial Management
- 2 credits Science: Applied Science, Biology
- 2 credits Social Studies: American History I, American History II
- 1 credit Health/ Physical Education
- 6 credits Occupational Preparation I, II, III, IV, elective credits
- Additional requirements:
 - Completion of IEP Objectives
 - Career Portfolio
- 4 credits Career/Technical Education electives

The following is an example of a planning guide for students completing a Future-Ready Core course of study at Pathways In Education. This course of study meets the graduation requirements of the State of North Carolina. Please note that some students may wish to take a different 4th year math in-line with their post-secondary goals. Some students may not wish to take World Language as part of their elective credits. Additionally, some students may wish to satisfy their electives requirement through Career Technical Education (CTE), Arts Education, World Languages, or any other subject area. It is the goal of Pathways In Education to provide

students with flexible scheduling, creative course delivery, and a wide range of learning opportunities.

9th Grade		10th Grade	
Semester 1	Semester 2	Semester 1	Semester 2
English 1A	English 1B	English 2A	English 2B
Algebra 1A	Algebra 1B	Geometry A	Geometry B
Physical Science A	Physical Science B	Biology A	Biology B
American History A	American History B	World History A	World History B
Physical Education	Health	French 1A	French 1B
Arts Elective	Arts Elective	Elective	Elective

11th Grade		12th Grade	
Semester 1	Semester 2	Semester 1	Semester 2
English 3A	English 3B	English 4A	English 4B
Algebra 2A	Algebra 2B	Precalculus A	Precalculus B
Earth Science A	Earth Science B	Civics	Economics
Sociology	CTE Elective	CTE Elective	CTE Elective
CTE Elective	CTE Elective	CTE Elective	CTE Elective

The following is an example of a planning guide for students completing a Future-Ready Occupational course of study at Pathways In Education. This course of study meets the graduation requirements of the State of North Carolina.

9th Grade	
Semester 1	Semester 2
English 1A	English 1B
Introduction to Mathematics A	Introduction to Mathematics B
Applied Science A	Applied Science B
American History 1A	American History 1B
Occupational Preparation 1A	Occupational Preparation 1B
Elective	Elective

10th Grade	
Semester 1	Semester 2
English 2A	English 2B
Algebra 1A	Algebra 1B
Biology A	Biology B
Physical Education	Health
Occupational Preparation 2A	Occupational Preparation 2B
Elective	Elective

11th Grade	
Semester 1	Semester 2
English 3A	English 3B
Mathematics of Personal Finance A	Mathematics of Personal Finance B
Occupational Preparation 3A	Occupational Preparation 3B
CTE Elective	CTE Elective
CTE Elective	CTE Elective

12th Grade	
Semester 1	Semester 2
English 4A	English 4B
American History 2A	American History 2B
Occupational Preparation 4A	Occupational Preparation 4B
CTE Elective	CTE Elective
CTE Elective	CTE Elective

Additional requirements for the Future-Ready Occupational course of study include:

- Completion of IEP Objectives
- Career Portfolio

Appendix D – Yearly Academic Calendar

Pathways In Education – North Carolina

PIE- NC Charter School Academic Aalendar FY 2022-2023

JULY 2022							AUGUST 2022							SEPTEMBER 2022						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6					1	2	3
3	4	5	6	7	8	9	7	8	9	10	11	12	13	4	5	6	7	8	9	10
10	11	12	13	14	15	16	14	15	16	17	18	19	20	11	12	13	14	15	16	17
17	18	19	20	21	22	23	21	22	23	24	25	26	27	18	19	20	21	22	23	24
24	25	26	27	28	29	30	28	29	30	31				25	26	27	28	29	30	
OCTOBER 2022							NOVEMBER 2022							DECEMBER 2022						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
						1			1	2	3	4	5					1	2	3
2	3	4	5	6	7	8	6	7	8	9	10	11	12	4	5	6	7	8	9	10
9	10	11	12	13	14	15	13	14	15	16	17	18	19	11	12	13	14	15	16	17
16	17	18	19	20	21	22	20	21	22	23	24	25	26	18	19	20	21	22	23	24
23	24	25	26	27	28	29	27	28	29	30				25	26	27	28	29	30	31
30	31																			
JANUARY 2023							FEBRUARY 2023							MARCH 2023						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7				1	2	3	4				1	2	3	4
8	9	10	11	12	13	14	5	6	7	8	9	10	11	5	6	7	8	9	10	11
15	16	17	18	19	20	21	12	13	14	15	16	17	18	12	13	14	15	16	17	18
22	23	24	25	26	27	28	19	20	21	22	23	24	25	19	20	21	22	23	24	25
29	30	31					26	27	28					26	27	28	29	30	31	
APRIL 2023							MAY 2023							JUNE 2023						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
						1		1	2	3	4	5	6					1	2	3
2	3	4	5	6	7	8	7	8	9	10	11	12	13	4	5	6	7	8	9	10
9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17
16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24
23	24	25	26	27	28	29	28	29	30	31				25	26	27	28	29	30	

Notes

Insurucational Days
Holiday
Recess
Center is open for SGI and Tutoring
Report Card Pick Up (Parent Conference Day, No School)
Staff Professional Development (No School)

*A 12-month staff work schedule includes all days when school is out of session, except for the following holidays available to all employees:

Independence Day	July 4, 2022	MLK Day	January 16, 2023
Labor Day	September 5, 2022	President's Day	February 20, 2023
Veterans's Day	November 11, 2022	Spring Recess	March 20-24, 2023
Thanksgiving Holidays	November 24-25, 2022	Memorial Day	May 29, 2023
Winter Recess	December 23, 2022 – January 2, 2023	Summer Recess	June 5-16, 2023

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Appendix E – Daily and Weekly Schedule

Pathways In Education – North Carolina



Pathways In Education – North Carolina Sample Student Schedules

Student 1

Student 1 is a 16-year-old, 10th grader who scored below grade level on the initial math and English STAR Renaissance assessments and, as a result, has been assigned to both math and English Small Group Instruction (“SGI”) classes and tutoring. These courses are in addition to the one-on-one student/teacher appointments required of all students. Student 1 has some family responsibilities, but does not hold a fulltime job and is not parenting.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
8:30-9:30: one-on-one appointment with Teacher	8:30-9:30: one-on-one appointment with Student Advisor	8:30-9:30: one-on-one appointment with Teacher	8:30-9:30: one-Math tutoring	12:00-1:00: Leadership Opportunity	9:00-2:00: Optional Math tutoring (required if a unit of math has not been complete for the month)
10:00-12:00: Algebra SGI Class	10:00-12:00: 10 th grade English SGI Class	10:00-12:00: Algebra SGI Class	10:00-12:00: 10 th grade English SGI Class		
4-6 hours of independent academic work (e.g. Student Activity workbook, online class, or projects)	4-6 hours of independent academic work (e.g. Student Activity workbook, online class, or projects)	4-6 hours of independent academic work (e.g. Student Activity workbook, online class, or projects)	4-6 hours of independent academic work (e.g. Student Activity workbook, online class, or projects)	4-6 hours of independent academic work (e.g. Student Activity workbook, online class, or projects)	

In addition to the schedule listed above, students may enroll in leadership and career development electives or other SGI courses (e.g. science, math, or English) for portions of the semester.

Student 2

Student 2 is a 19-year-old, 12th-grader who scored at grade level on the initial math STAR Renaissance assessment and above grade level on the English STAR Renaissance assessment. Student 2 has an 8-month-old child for whom she only has two days of childcare per week. Student 2 has been primarily assigned to guided, independent study classes as well as an online AP English class. As a senior, postsecondary planning is important to Student 2, and she was assigned to a Senior Seminar, which maximizes her available hours at the school site.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
4-6 hours of independent academic work (e.g. Student Activity Workbook, online class, or projects)	10:00-11:00: Monthly meeting with Student Advisor (college and career focus)	4-6 hours of independent academic work (e.g. Student Activity Workbook, online class, or projects)	9:00-11:00: Senior Seminar	9:00-2:00: Community service fieldtrip	9:00-2:00: Optional Math Tutoring (required if a unit of math has not been completed for the month)
	11:00-12:00: one-on-one appointment with teacher		11:00-12:00: one-on-one appointment with teacher		

Student 3

Student 3 is an 18-year-old, 11th-grader who scored at grade level on the initial math and English STAR Renaissance assessments and has passed the end-of-course tests in all subjects except English II. Student 3 works to help support his family; however, conversations between the student and his parents, teacher, and employer have resulted in Student 3 receiving an extended lunch hour to allow for school attendance. This extra time will help Student 3 achieve his goal of high school graduation.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
4-6 hours of independent academic work (e.g. Student Activity Workbook, online class, or projects)	12:30-1:30: one-on-one appointment with teacher	4-6 hours of independent academic work (e.g. Student Activity Workbook, online class, or projects)	12:30-1:30: one-on-one appointment with teacher		9:00-2:00: English tutoring
	2:00-4:00: English Foundations (SGI class)		2:00-4:00: English Foundations (SGI class)		

Pathways In Education- North Carolina will be open to students from 8:00 a.m. to 5:00 p.m. each day. Since this is an extended school day, teacher will stagger their shifts with some teachers arriving later in the day and staying until the school closes. The first three-hour instructional block runs from 8:30 a.m. to 12:30 p.m. and a second block runs from 1:00 p.m. to 4:00 p.m. Regardless of arrival time, each teacher will spend six hours a day working directly with students—either individually or in classroom settings. Most student meetings will take place Monday through Thursday; Fridays will be reserved for teachers to meet with students who need additional support, have missed appointments during the week, or for student grading and records maintenance. Teachers will also hold office hours from 8:00 a.m. to 4:00 p.m.

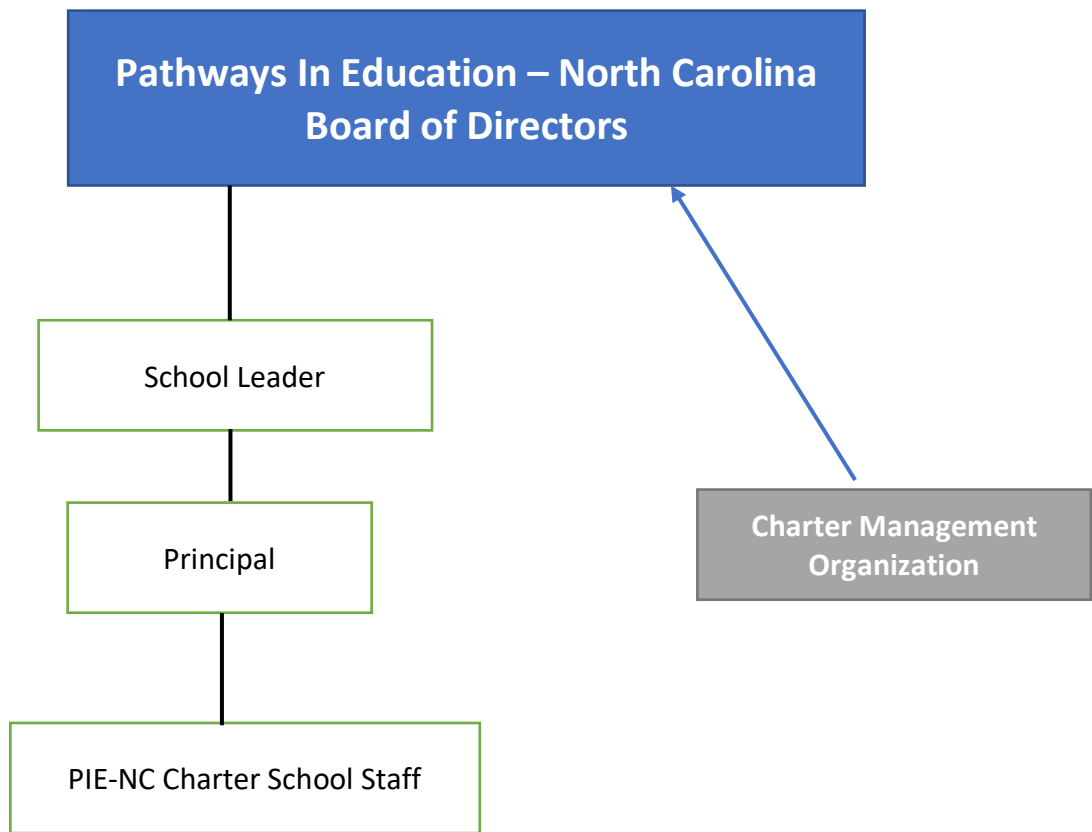
Appendix F – Federal Documentation of Tax-Exempt Status

Pathways In Education-North Carolina

Pathways in Education - North Carolina, Inc. shall apply for 501(c)(3) federal tax-exempt status no later than twenty-four months following final approval of the application.

Appendix G – Organizational Chart

Pathways In Education – North Carolina



- Arrows indicate a contractual prelateship to provide services
- Solid lines indicate a reporting, supervision and evaluative relationship.

**Pathways Management Group
Charter Management Organization**

Chief Academic Officer

The Chief Academic Officer oversees the complete management of Pathway in Education, including all the PIE charters and contracts

Sr Director of Education Systems

The Sr Director of Education System ensures the instructional of the Pathways In Education programs whole overseeing the implementation of rigorous, standards- aligned curriculum, state standards requirements and staff development

Director of School Implementation

During the planning year and the first twelve to eighteen months, the Director of School Implementation acts as the main liaison between PIE- North Carolina and PMG to ensure that the program is implemented with fidelity. Major responsibilities including mentoring the school leader, overseeing new staff training and ensuring that curriculum and other instructional resources are available to students and staff.

Senior Director of Academics

The Sr. Director of Academics Directly supervisors all Pathways In Education schools nationwide and is responsible for the instructional design for all Pathways In Education schools through effective and efficient operations of curriculum, instructional, assessment, special program and staff development

Cluster Director

The Cluster Director oversees community and district relations over three to five Pathways In Education School Sits. In this role, the Cluster Director works closely with the Principal to ensure that each PIE school is responsive to the unique need of the community in which it is located and is performing at an acceptable level to meet State and Local Performance metrics.

Appendix H – Charter School Board Member Response and Resume

Pathways In Education – North Carolina

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: **Pathways In Education- North Caroline (PIE-NC)**

2. Full name: **James H. Wilkes, Jr.**

Home Address: **6721 Barton Creek Dr., Whitsett Nc 27377**

Business Name and Address:

Telephone No.: **704-460-7456**

E-mail address: **pastorwilkes@eflonfbc.org**

3. Brief educational and employment history.

The University of North Carolina at Greensboro- Bachelors of Arts in Business

Administration and Business Management (B.S)

Wake Forest University – Master of Divinity (M. Div)

Boston University – Doctor of Ministry (D. Min)

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 developed an interest after several conversation with the Cheryl Moore about Pathways In Education. She convened meetings with educators and community leaders in my congregation. As a community leader and grassroots organizer in the areas of education and social justice, as a result of my interest to be part of Pathways' vision after an information session. I felt a sense of an urgent call to be part of propelling this mission through serving youth.

6. What is your understanding of the appropriate role of a public charter school board member?
To have oversight in all areas pertaining to the structure, governance, operations and procedures and overall success of the school on every level. To ensure that its educational programs are executed with excellence and accountability. To support the mission and goals of the school cooperatively. To ensure that every student is engaged in a safe environment and is successful in the accomplishment of his or her personal academic goal.

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

I have served as the President and Chairman of the Board for non-profit faith-based organization over the past 10 years. I also work with educators and parents exclusively in at-risk communities. As an Executive Professional and a current Senior Pastor, I possess the skills, experience, and knowledge base that would make me an effective Board Member. In fact, I was once that little boy who would have benefited greatly from a Pathways' school.

8. Describe the specific knowledge and experience that you would bring to the board.
I have over a decade of law, governance, and procedural knowledge it pertains to the operations of non-profit organizations. I also possess Executive Leadership and Team Management skills exercised through my professional experience. The core of my community leadership and pastoral community work is serving under-served communities and at-risk youth and young adults.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
The guiding belief of school I rooted in the commitment of Social Emotional Learning. If an under-serve student is holistically served, then personal growth and academic success are sure to follow. Every student has the capacity to learn, to grow, and be successful in life even beyond academic. There is a "pathway "to a successful life that is grounded in the educational model and approach to engaging each student. The mission

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

is to serve at-risk youth through an educational approach that would foster, recovery, retention, promotion, and the overall enhancement of student life.

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

Pathway's educational program is a blended model that serves students on the spectrum of academic life from the exceptionally gifted to the special needs student. This model not only ensures a great education, but is also designed to both prepare and propel students to excel after graduation. Social Emotional Learning is the core approach to teaching and learning. There is a workforce and career development component as well as experimental learning aspect to undergird its pragmatic mission.

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

The characteristics of a successful school include but are not limited to the following

- **Faculty and staff who operate in excellence and integrity**
- **Effective Leadership**
- **Fosters high staff and student morale**
- **Offers effective educational and social engagement opportunities**
- **Parent/community involvement**
- **Impactable Governing and Management**

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

Targeted goals that results from effective planning will be met in conjunction with any modifications that may be necessary as the school year progresses. Flexibility is key. Measured outcomes will be frequently evaluated and re-evaluated to ensure that deliverables are feasible and attainable.

Governance

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

The Board will engage in the planning stages of the school and set parameters and expectations thereof. The Board will serve as an oversight entity to ensure that every aspect of the school's operations is executed effectively and efficiently with great proficiency.

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

The results of overall evaluations and the consensus of the Board, Management, Faculty/Staff, and Students will determine the success of the first year.

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

Measured short-term and long-term goals will have been achieved; A plan for further growth and expansion will be necessary; Retention and graduation rates increased steadily; The community remains supportive and engaged; Student success beyond graduation is tracked; Charter renewal is granted.

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

- **Take the lead in regards to vision casting and expectations**
- **Interface with School Leadership**
- **Setup and Maintain trackable performance measures for faculty and students**
- **Operational Oversight**
- **Commitment to Excellence**

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 follow the guidelines for the appropriate fact finding process and whatever is specified in accordance with the Board of Governance and By-Laws for resolving these issues. I would have built a good working -relationship with said members and would also broach a conversation with limitations.

*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, James H. Wilkes, Jr., 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 PIE-Charlotte Charter School is true and correct in every respect.

James H. Wilkes, Jr.
Signature

7-15-20
Date

If you have questions regarding the application process, please contact the Office of Charter Schools via email at

Reverend James H. Wilkes, Jr.

Email: elderjhw@icloud.com

Rev. James H. Wilkes, Jr. is a native of Charlotte, North Carolina, and he is the only child of Mr. James H. Wilkes, Sr. and the late Mrs. Deborah Wright Wilkes. On September 23, 2017, he married Miss Melia Olivia Burris, of Gastonia, NC.

Rev. Wilkes is a graduate of the Gaston County Public School System. He graduated from The University of North Carolina at Greensboro where he earned a Bachelor of Science degree in Business Administration with a concentration in Business Management and also his Master of Divinity degree at Wake Forest University. Currently, he is pursuing his Doctor of Ministry degree from Boston University.

Rev. Wilkes answered the call to ministry at the age of 13. In July 2007, he was licensed to preach the Gospel while at the historic Mount Calvary Baptist Church (Gastonia) and was ordained in 2011. He served at the church of his childhood under the impactful leadership of Pastor James Burris, while simultaneously serving as President of the Youth Missionary Department, a member of the Community Outreach Ministry and Youth Adviser. He is also the Founder of Youth Connected 4 Christ Ministries. Later, Rev. Wilkes served as the Assistant to the Pastor of the Genesis Church in Gastonia, North Carolina where Rev. Johnny D. Brown, III is the current pastor. He also served as a ministerial staff member at Union Baptist Church, Winston-Salem, NC, under the direction of Dr. Sir Walter L. Mack II.

On Monday, July 25, 2016, Rev. Wilkes was voted unanimously as Senior Pastor of Elon First Baptist Church in Elon, NC and was officially installed as the church's eighth pastor on October 16, 2016.

Rev. Wilkes has deep passion for disenfranchised communities, At-Risk Youth and Young Adults, and the underserved student population particularly in his home state of North Carolina. He continues to work with several faith-based organizations, civic organizations, and communities to bridge the gap in the areas of education and socio-economic disparities. His leadership and vision for programs and community outreach endeavors continues to make an indelible impact within the communities that he serves.

The ministry of Pastor James H. Wilkes, Jr. can be described as one that energetically pursues nontraditional avenues by collaborating with the people and connecting communities to present relevant community engagement opportunities which have intergenerational appeal. As an influencer, he encourages partnerships with diverse community groups to meet the needs of people who are underserved and underrepresented across the state of North Carolina.

Most importantly, Pastor Wilkes is motivated and imparts this motivation to youth and young adults through his powerful messaging based on this scripture: He knows that Jeremiah 29:11 remains true: "For I know the plans that I have for you saith the Lord, plans to prosper you and give an expected future." Reverend Wilkes believes that EVERY YOUNG PERSON has the capacity to DREAM AND ACHIEVE!

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:** Pathways In Education- North Caroline (PIE-NC)
2. **Full name:** Alvin Donnell Wallace

Home Address: 4022 Barclay Forest Drive Charlotte, NC 28213

Business Name and Address: Wells Fargo Bank 301 S, Tryon Street, Charlotte, NC 28205

Telephone No.: 704-737-6521

E-mail address: adwallace11@yahoo.com

3. **Brief educational and employment history.** I have completed 4 years of college (1987 graduate) at North Carolina Agricultural & Technical State University in Greensboro, NC obtaining a B.S. Degree in Computer Science. I am currently pursuing a Master of Divinity Degree from Hood Theological Seminary in Salisbury, NC. I am currently employed with Wells Fargo Bank as a Business Analyst in the Wealth Management Group. I have been employed with the bank since 2005 and have held several positions in Risk & Compliance, and Audit.
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: **X**

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?

Recruitment:

Having had several conversations with Cheryl Moore and learning more about Pathways, I was asked to consider joining the board. Learning more about the school, and being vested in the well-being and care of our city's underserved youth made the decision to join the board very easy. I wish to serve on the board of Pathways in Education because I have a wealth of leadership and management expertise not only in the corporate sector, but in the non-profit sector benefiting children and youth in at-risk populations. I assisted in starting a non-profit organization in Charlotte that served 75 youth and families resulting on several of them going to college on scholarship. We also benefited several of them by preparing them to join the workforce confidently and successfully. I feel my skills and experience will be beneficial in serving on the board of a school such as PIE-NC reaching a larger population of at-risk youth.

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

I understand as a board member we will be responsible for various facets of running the school including fiscal oversight, operations & academics oversight, school discipline (expulsions). We will also be responsible for ensuring we follow relevant meeting laws and adhere to all other board related policies and regulations. This is by no means a complete list of the responsibilities we will carry out in this role.

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 participated on a board of a Youth Empowerment program with which I was responsible for the oversight of volunteer participation, hiring of staff and curriculum planning. I was also instrumental in site planning and location for the program, as well as the recognition activities of children and staff.

I also served on the board of a youth enrichment program, An Angel's Touch, in preparing kindergarten and elementary aged youth to transition into the upper elementary and junior high learning environments. I assisted in hiring of staff and curriculum planning as a board member for this group.

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

In addition to my previous board experience, I bring my expertise in leadership, business management, workforce development, community involvement, and experience working directly with those underserved youth. I also bring a great desire to see them succeed, as well as partnering with the parents and having them partner in their child's success.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

School Mission and Program

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

The mission of PIE-NC is to provide educational programs (partnering with school districts) and support to high school students, enabling them to graduate from high school prepared for postsecondary education and a 21st century workforce. Its vision is to provide students in the Charlotte-Mecklenburg Schools (CMS) boundaries the choice to enroll in PIE-NC where every student is provided a quality academic education through high school and access to postsecondary education and careers. Students will have workforce and career development opportunities, which deepens their connection to school, fosters lifelong learning, and graduates productive members of society.

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

PIE-NC will be a school in which students achieve academic success by focusing on dropout recovery, preparing for post-high school endeavors (postsecondary education and career), and practicing PIE-NC's core values in their daily lives. A blended education model will be geared toward those underserved and disadvantaged youth, including special populations (credit deficient, pregnant/parenting, truant, have existing IEPs that recommend independent study as an appropriate placement, English language learners, economically disadvantaged, homeless, in foster care, and/or adjudicated). Through this model PIE-NC will work to accomplish the stated goals resulting in positive outcomes for the student population.

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

Characteristics of a successful school would include, but not be limited to,

- Providing quality academic instruction
- Preparing youth for postsecondary education and careers
- Developing highly qualified staff
- Developing individualized instruction
- Being fully accountable for meeting state standards

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

A successful school would be one that demonstrated a strong partnership with the current school district to provide a specialized curriculum tailored for toward the educational success of our underserved student population. There would be noted academic performance improvement of the overall population, resulting in the targeted

number of youths moving on to higher levels of education, or successfully entering the workforce. There should be a flexible curriculum in place enabling each individual student to matriculate through the program while still being able to maintain their day-to-day life (work, family balance) while achieving their academic goals.

Governance

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

The board will be responsible for the following:

- Setting and achieving annual budgetary goals
- Managing and maintaining oversight of all facets of the school's day-to-day operations
- Screening and hiring qualified teaching and administrative staff
- Developing each of or individual board member skills to better serve the school and student population

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

A successful school would be one that demonstrated a strong partnership with the current school district to provide a specialized curriculum tailored for toward the educational success of our underserved student population. There would be noted academic performance improvement of the overall population, resulting in the targeted number of youths moving on to higher levels of education, or successfully entering the workforce. There should be a flexible curriculum in place enabling each individual student to matriculate through the program while still being able to maintain their day-to-day life (work, family balance) while achieving their academic goals.

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

A successful school after 5 years would be one that grew their strong partnership with the current school district and are looked to as a referral partner for those students and families needing a blended learning environment provided by PIE-NC. There would be marked academic performance improvements of the overall population which is trended and showing positive results after each school year. The number of youths moving on to higher levels of education, or successfully entering the workforce shows marked and "trendable" improvement.

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

To ensure success the board will need to actively seek well-qualified staff and administrators who share and embrace the mission and vision of PIE-NC. We will meet consistently and frequently to discuss planning, goals, successes, and opportunities for the school. We will need to partner with the community to better understand the needs of the school, and how we can work together in benefiting the targeted student population. We will need to be able to strategically and methodically plan the fiscal year and manage any potential shortfalls accordingly. We will need to review school data monitoring for successes and proactively address any potential barriers that could impede the school's success.

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?

To address any such situations, we would need to bring all members to the table including the persons of concern. We would address the matters at hand and come up with a solution that everyone can buy into ensuring that everyone realizes that whatever decision we make, should always be in the best interest of the students and our school.

*Please include the following with your Information Form

- a one page resume

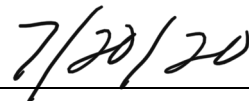
*If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action taken and the license validity. [Click or tap here to enter text.](#)

Certification

I, Alvin Donnell Wallace, 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 Pathways in Education - North Carolina Charter School is true and correct in every respect.



Signature



Date

Alvin D. Wallace

Email: Adwallace11@yahoo.com

Alvin D. Wallace is a native of Charlotte, North Carolina. He was educated in the Charlotte Mecklenburg School System graduating from West Charlotte Senior High in 1983. He received his Bachelor of Science degree from North Carolina Agricultural & Technical State University in Greensboro, NC in 1987. He is currently pursuing a Master of Divinity degree from Hood Theological Seminary in Salisbury, NC.

Alvin's professional career path is in banking and finance, and expands over 30 years. Currently he is employed with Wells Fargo Bank as a Business Support Associate within the Wells Fargo Advisors group. He has also held the positions of Senior Compliance Consultant, Senior Operations Auditor, and Treasury Services Analyst.

Alvin is the son of the late M.C. and Dorothy Wallace, and had 9 siblings. Although he has no biological children of his own, Alvin has played an active role in raising his nieces and nephews who all absolutely adore him. He believes in proverb, "it takes a village to raise a child," and he proudly does his part. He believes in the unity and growth of the family, immediate and extended. He has been very active in raising his preteen god-nephew from an infant until the present. He finds no greater joy than doing so.

Alvin's professional and community associations include the following:

- Mentor through Big Brothers Big Sisters of the Carolinas
- Co-founder and Chief Operating Officer of a non-profit organization Youth Empowered to Bring Change
- Board Member of An Angels Touch Youth Enrichment Program
- Associate Minister of St. Paul Baptist Church (through June 2020)
- Founder of iConnect Small Group Ministry at St. Paul Baptist Church
- Small Group Ministry Leader
- Associate Minister of The Park Ministries (2005 – 2017 and July 2020 - present)
- Singles Ministry Leader
- Community Volunteer
- New Members Council Facilitator

Charter School Board Member Information Form

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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: Pathways In Education- North Caroline (PIE-NC)
2. Full name: Tara S. Gibbs

Home Address: 9224 Kings Parade Boulevard, Unit 2313, Charlotte, NC 28273

Business Name and Address:

Telephone No.: 919-616-0662

E-mail address: revtaragibbs@gmail.com

3. Brief educational and employment history.

Education

2016 Th.M. Practical Theology, Princeton Theological Seminary, Princeton, NJ

2015 M.Div. Theology Shaw University Divinity School, Raleigh, NC

2011 B.A. Romance Languages & Literature: Spanish, UNC-Chapel Hill, Chapel Hill, NC

Employment

2017-present Director of Christian Education, Reeder Memorial Baptist Church, Charlotte, NC

2016 Supply Pastor, Lumberton United Methodist Church, Lumberton, NJ

2015-2016 Y Scholars Facilitator, Princeton Family YMCA, Princeton, NJ

2014-2015 Spanish Instructor, Renaissance Education Group, Durham, NC

2013-2015 Teaching Associate, Citizen Schools, Durham, 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?

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

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?

Recruitment:

- Currently serving at-risk youth through volunteerism & work in underserved communities in Charlotte, NC.
- +7 years of experience serving at risk youth through educational non-profits: YMCA, Renaissance Education Group, and Citizen Schools.

Reasons to serve:

- Commitment to the community of Charlotte-Mecklenburg
- Dedication to at-risk youth (PIE-NC will focus on serving disadvantaged youth including students who are credit deficient, pregnant/parenting, truant, have existing IEPs that recommend independent study as an appropriate placement, English language learners, economically disadvantaged, homeless, in foster care, and/or adjudicated)
- Desire to prepare a local workforce that closes the skills gap and meets the needs of employers
- Recognize a need for alternative education options for students who are not as well served by traditional educational models

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

- Fiscal oversight
- Operations & academics oversight
- Personnel oversight, particularly the hiring and evaluation of school leader
- School discipline (expulsions)
- CMO (Pathways Management Group, PMG) oversight
- Participation in trainings, retreats, and board meetings
- Follow relevant meeting laws
- Avoid conflicts of interest
- Champion/advocate for the school
- Assist with recruitment
- Engage in fundraising and partnership development/leverage personal networks

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.

- Board experience – 5 years Student Government Board experience (President, Vice President, Chaplain, and Representative)
- Volunteerism: CMS Schools volunteer at University Park Creative Arts Elementary; facilitated back to school supply drives in August and January for the last 3 year.
- Professional experience – Engaged in education and community engagement at work; started free weekly tutoring programs at Reeder Memorial for at-risk youth.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

- “Adopted” and tutored a homeless, unemployed church member who needed to complete a GED and her son who was starting Kindergarten without any formal preschool education.
8. Describe the specific knowledge and experience that you would bring to the board.
- Education – experience as an educator, special education knowledge, experience managing staff or programs, connections to postsecondary institutions, understanding of different learning styles and how PIE-NC’s blended model of Small Group Instruction (SGI), Independent Study (IS) and Online Learning (OL) will work better for some students who have not thrived in traditional settings, understanding of pressing issues in education including diversity, equity, and inclusion
 - Business/NPO/Church management – experience hiring and managing staff, policy development and implementation, compliance, finance, information technology, etc.
 - Community engagement – experience recruiting community members (for anything), marketing/PR, attendance at local government and community meetings (such as...), partnership development, knowledge of local nonprofits, the community, and its needs
 - Workforce development – connections to the business community (particularly in high growth, high demand industries), knowledge of the Workforce Innovation and Opportunity Act (WIOA), knowledge of/experience with apprenticeships, connections to community colleges

School Mission and Program

1. What is your understanding of the school’s mission and guiding beliefs?
 - Mission: The mission of PIE-NC is to provide educational programs (partnering with school districts) and support to high school students, enabling them to graduate from high school prepared for postsecondary education and a 21st century workforce.
 - Vision: Students in the Charlotte-Mecklenburg Schools (CMS) boundaries will have the choice to enroll in PIE-NC where every student is provided a quality academic education through high school and access to postsecondary education and careers. Students will have workforce and career development opportunities, which deepens their connection to school, fosters lifelong learning, and graduates productive members of society.
 - Core values: mutual trust, mutual respect, compassion, resilience, and integrity
2. What is your understanding of the school’s proposed educational program?
 - PIE-NC will be a school in which students achieve academic success by focusing on dropout recovery, preparing for post-high school endeavors (postsecondary education and career), and practicing PIE-NC's core values in their daily lives.
 - Serving at-risk and disadvantaged youth, including special populations (credit deficient, pregnant/parenting, truant, have existing IEPs that recommend independent study as an appropriate placement, English language learners, economically disadvantaged, homeless, in foster care, and/or adjudicated)
 - Individualized and personalized attention
 - Blended SGI, IS, OL teaching platforms
 - Flexible schedules

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- Credit recovery/return many students to home schools once caught up
 - Career technical education (CTE) and workforce development
 - Preparation for college/dual enrollment with community colleges
3. What do you believe to be the characteristics of a successful school?
- Quality academic instruction
 - Prepares youth for postsecondary education and careers
 - Diverse, equitable, inclusive culture
 - Highly qualified staff
 - Small class sizes
 - Individualized instruction
 - Strong special education program and processes
 - Strong English language learners program
 - Accountable for meeting state standards
 - Whole child approach to uncover and overcome any barriers
 - Blended learning (SGI, IS, OL)
 - Teaching to different learning styles (visual, auditory, kinesthetic)
 - Strong relationships and mentoring between teachers/staff and students
 - Schedules that allow students with competing responsibilities to succeed
 - Sound management
 - Fiscally responsible
 - Transparent
4. How will you know that the school is succeeding (or not) in its mission?
- Partnership with school district established
 - School is providing a curriculum aligned with state standards
 - Student performance on state tests
 - Student grades and other assessments
 - Student body reflects community demographics
 - Student body is primarily made up of at-risk target demographics students
 - Exceptional children (EC, these are students with disabilities), ELs, and Academically or Intellectually Gifted (AIG) students are all served well and advancing along with their peers
 - Student and parent surveys indicate a high level of satisfaction
 - Dual enrollment
 - CTE participation
 - Graduation rates
 - College acceptance/attendance
 - Training related career entry

Governance

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

1. Describe the role that the board will play in the school's operation.
 - Fiscal oversight – annual budget approval, budget projections, student enrollment, manage annual audits
 - Operations & academics oversight – evaluate CMO, policy development, strategic planning
 - Personnel oversight - hiring and evaluation of school leader and other staff
 - School discipline - expulsions
 - Participation in trainings, retreats, and board meetings
 - Champion/advocate for the school – recruitment events; word-of-mouth marketing; meetings with government officials and business leaders; introduction to funders, volunteers, and board member prospects; leverage personal networks for fundraising

2. How will you know if the school is successful at the end of the first year of operation?
 - Recruitment goals are met
 - Instruction is aligned with state standards
 - Students are advancing academically
 - Students are participating in CTE opportunities
 - Student body is diverse and comprised of individuals in the target demographic primarily
 - Exceptional children, EL, and AIG programs in place

3. How will you know at the end of five years of the schools is successful?
 - School enrollment goals are met each year
 - History of student performance on state tests is proficient and trending upward
 - EC, EL, and AIG programs are showing year over year gains
 - Graduation rates rising
 - College acceptance rates rising
 - Students entering training related careers rising
 - Dual enrollment participation rising

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
 - Rigorous recruitment of school leader
 - Maintain regular board meeting schedule and provide board training
 - Participate in school and community events
 - Leverage personal networks to make advantageous introductions for the school
 - Regularly review school data and finances
 - Engage in strategic and fiscal planning
 - Use best practices in governance, including adherence to bylaws, all applicable state and federal laws, state meeting rules, and avoid conflicts of interest

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?

- Bring all members to the table including the persons of concern. Discuss the matters at hand and come up with a solution that everyone can buy into. Making sure that everyone realizes that whatever decision we make, should always be in the best interest of the students and our school.

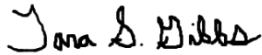
*Please include the following with your Information Form

- 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. N/A

Certification

I, Tara S. Gibbs, 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 Pathways in Education- NC Charter School is true and correct in every respect.



Signature

July 21, 2020

Date

Tara S. Gibbs

Director of Christian Education
Reeder Memorial Baptist Church
Charlotte, NC 28216 Email: revtaragibbs@gmail.com Tel: (919) 616-0662

Curriculum Vitae

Education

2016 Th.M. Practical Theology

Specialization: Christian Education

Princeton Theological Seminary, Princeton, NJ
Shaw University Divinity School, Raleigh, NC

2015 M.Div. Theology

2011 B.A. Romance Languages & Literature

Specialization: Spanish

UNC-Chapel Hill, Chapel Hill, NC

Research Experience

August 2013-December 2013

Research Assistant, Hosea Commentary, Dr. Cheryl Kirk-Duggan
Prince Hall Masons of Louisiana, and Civilian Conservation Corp in
Louisiana 1940-1955, Dr. Cheryl Kirk-Duggan.

2016

Thesis "Supplementing the Realist-Only Approach to Christian
Education with Pragmatism in the Black Baptist Church Context,"
Princeton Theological Seminary.

Publications

"The Testimony of Hidden Figures," *#MillennialWomanism*, Black Theology Project (Summer 2017)

Curriculum Development

Reeder Memorial Baptist Church, Apprenticeship Model Curriculum Designer, "God Is..." June 2018
Lott Carey Jamaica Short Term Mission 2018, Head Curriculum Designer, "Be A Hero For Jesus:
#BlackPanther," July 2018

Work Experience

Reeder Memorial Baptist Church: Director of Christian Education

January 2017-Present

I supervise and lead all ministries pertaining to Christian Education at a Charlotte church serving over 1,000 members. I design curriculum for Sunday School and Vacation Bible School, teach youth and adult Bible Study, and design events around the Christian calendar such as a Holy Week Stations of the Cross experience and Advent Services. My latest project is designing monthly workshops on critical issues in the African-American Community that churches need to address directly such as domestic violence and nutritious eating habits. The senior pastor consults with me for writing relevant and theologically sound litanies for each weekly service. As an associate minister, I also preach every month, provide counseling to members, and volunteer in the community.

Lumberton United Methodist Church: Supply Pastor

May 2016-December 2016

I served as the senior pastor of a small New Jersey congregation as they searched for a long-term pastor. I provided empathetic pastoral care for the congregation by visiting the sick, counseling grieving families, and donating goods to the needy. Every week I preached relevant messages to address the needs of the congregation as well as teach them more of the Christian Faith in an ever-changing world. I intentionally crafted each service, including hymn selection, bulletin format, and the litanies, to further emphasize the message for the week. In the community, I represented our congregation at town halls, police policy meetings, and interfaith events.

Princeton Family YMCA: Y Scholars Facilitator

September 2015- June 2016

I oversaw and managed the Y Scholars program, an extracurricular educational and teen mentoring program that supports underrepresented youth. I recruited and supervised volunteers through appealing presentations. I also recruited students and effectively engaged their families through in-person conferences, emails, and various social media. In the community, I solicited and negotiated business donations. Administratively, I compiled student/volunteer information in an organized database. By making day-to-day decisions about the program design, I created and implemented strategies to publicize the program. I developed and taught engaging college preparedness lessons.

Renaissance Education Group Upward Bound: Spanish Instructor

June 2014-August 2015

I taught Spanish language and grammar to underrepresented minority high school students. Using Open Educational Resources, I developed an engaging yet rigorous Spanish curriculum. To measure growth, I created measuring instruments and assessed progress to set goals. Additionally, I guided students through the college application process by planning college tours and assisting with financial aid applications. I also collaborated with other instructors to research national college access programs.

Citizen Schools: Teaching Associate

November 2013-May 2015

I taught underrepresented middle school students afterschool and collaborated with day instructors to ensure student success. I created hands-on, differentiated, and engaging academic lessons in Math and English Language Arts to reinforce learning from the traditional school day. Additionally, I infused lessons with connections to career and college options for students, making college real and plausible to the students. I built relationships with students, families, volunteers, and the school community. This allowed me to encourage student growth and high achievement. I also served as the campus translator for Spanish speaking families.

Certifications, Skills, and Proficiencies

- Social Media Marketing (Facebook, Instagram, Twitter)
- *NCLB Highly Qualified Status*: Spanish and ESOL/ESL with high Praxis II Score
- Advanced Spanish: Written, Oral, and Spoken
- Proficient with software such as Banner, Salesforce, Blackboard, Moodle, and Adobe Connect
- Stewards of Children Child Sexual Abuse Prevention Certified

Charter School Board Member Information Form

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Background

1. Name of charter school on whose Board of Directors you intend to serve: Pathways In Education- North Caroline (PIE-NC)
2. Full name: **Linda P. Thomas**

Home Address: **8616 Getalong Rd, Charlotte NC 28213**

Business Name and Address:

Telephone No.: **(704) 576-8220**

E-mail address: **lptgm@aol.com**

3. Brief educational and employment history.
M. Ed-Cleveland State Univ., B.S.-Ursuline College. Charlotte-Mecklenburg Schools: Professional Development Master Teacher, Lead-Master Kindergarten Teacher, Family Educator Coordinator, Parent Involvement Coordinator

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?

If you have questions regarding the application process, please contact the Office of Charter Schools via email at _____

I became interested after hearing about Pathways' intention to establish a school from a colleague. I inquired of the Development Director and shared my experience as a Charlotte-Mecklenburg Schools educator for over 30-years serving at-risk-youth. I was asked to join the board as a good fit due to my leadership and management experience. I have a deep and abiding commitment to serving underserved families in our community. I've worked with and led adolescent pregnancy programs, homeless youth, and parent engagement groups. I also recognize the need for education options for youth who are not being served by traditional educational models. PIE-Charlotte's mission aligns with my life's work and passion.

6. What is your understanding of the appropriate role of a public charter school board member?
To provide overall oversight to the operations and management of the school. This includes fiscal/budgets, hiring processes and procedures, adherence to guidelines, state laws and policies; disciplinary policies; Pathways Management Group, and every aspect therein. We will also serve as a voice and advocate for the school and the students within the community. Fundraising and continual partnership opportunities are also important roles.

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.

- Program Specialist for Family Self Sufficiency (Charlotte Housing Authority)
- Charter Member of Ready To Learn Advisory Council
- Charlotte-Mecklenburg Community Relations Committee
- Board of Trustees for Project Friendship
- Moderator of Christian Education, St. Marks Presbyterian Church
- Advisory Council, Committee of 100 Women- Johnson C. Smith University

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

I have over 40 combined years of being an educator and civic leader. I have vast experiences understanding and working with children and youth with different learning styles and behavioral issues. Educational equity and equality, policy and procedure implementation, community outreach and engagement, and non-profit partnerships are also experiences that I will use as tools to be an effective board member.

School Mission and Program

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

The mission of PIE-NC is to provide educational programs in partnership with school districts to provide support to high school students. Social Emotional Learning is a key approach to Pathways' guiding beliefs. All students are capable of learning and excelling at their own pace through a blended model instructional methodology. Students will have workforce and career development opportunities, which deepens their connection to school, fosters lifelong learning, and graduates productive members of society.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at

2. What is your understanding of the school's proposed educational program?
 - **PIE-NC will be a school in which students achieve academic success by focusing on dropout recovery, preparing for post-high school endeavors (postsecondary education and career), and practicing PIE-NC's core values in their daily lives.**
 - **Serving at-risk and disadvantaged youth, including special populations (credit deficient, pregnant/parenting, truant, have existing IEPs that recommend independent study as an appropriate placement, English language learners, economically disadvantaged, homeless, in foster care, and/or adjudicated)**
 - **Individualized and personalized attention**
 - **Blended SGI, IS, OL teaching platforms**
 - **Flexible schedules**
 - **Credit recovery/return many students to home schools once caught up**
 - **Career technical education (CTE) and workforce development**
 - **Preparation for college/dual enrollment with community colleges**

3. What do you believe to be the characteristics of a successful school?
 - **Safe school environment for ALL students, faculty and staff**
 - **Quality instructional program tailored uniquely for the targeted demographic**
 - **Qualified and passionate faculty and staff**
 - **Diversity and Inclusion intentionality**
 - **Adherence to laws, policies and procedures**
 - **Fiscally responsible**
 - **Community Engagement**
 - **Parent Involvement**
 - **Experiential learning opportunities for students and parents**
 - **Academic success measures and student tracking**
 - **Whole child approach to education and social constructs**

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

We will know if the school is succeeding or not in its mission by having measured and graded evaluations completed periodically by students and parents; faculty internal evaluations and frequent communication; student enrollment maintenance and growth; student performance (will vary contextually); community reactions to the school. Graduation rates and college readiness will also be factors.

Governance

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

The board will provide fiscal oversight specifically to budget development/implementation/management and overall projections. The board will approve all budget submissions. The board will call for and manage annual auditing

If you have questions regarding the application process, please contact the Office of Charter Schools via email at

processes. The board will also give oversight to academic and instructional planning, policy development and implementation, as well as stringent adherence to laws and state guidelines.

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

- **Recruitment goals are met**
- **Instruction is aligned with state standards**
- **Students are advancing academically**
- **Student retention goals are met/exceeded**
- **Students are participating in CTE opportunities**
- **Student body is diverse and comprised of individuals in the target demographic primarily**
- **Exceptional children, EL, and AIG programs in place**

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

School enrollment and student retention goals are on par each year. Student performance evaluations continue to rise. Graduation rates increase and college acceptance is achieved at a high rate. Most of the short-term and long-term metrics are met academically, operationally, and communally.

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

Recruitment of qualified leaders and faculty members who share the mission and vision of Pathways' School. Adjusting evaluation standards periodically to align with the growth patterns and trends of the school academically and operationally. Engage in continual strategic planning and use best governance practices across the board.

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?

We would refer to the conflict-resolution policies agreed upon by the Board. We would then adhere to these policies in order to determine the best resolution. We will be sure that all resolutions and decisions are fair, integral, and represent the best interests of the school.

*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

If you have questions regarding the application process, please contact the Office of Charter Schools via email at

*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, Linda P. Thomas, 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 PIE-Charlotte Charter School is true and correct in every respect.

Linda P. Thomas

Signature

7-19-20

Date

If you have questions regarding the application process, please contact the Office of Charter Schools via email at

LINDA P MARKS THOMAS

lptgm@aol.com

©704-576-8220

8615 Getalong Rd, Charlotte, NC 29213

SKILLS: Supervision/Leadership, Collaborative Planning, Student and Family Relations/Budget

TEACHING AND EDUCATIONAL EXPERIENCES

CHARLOTTE MECKLENBURG SCHOOLS, Charlotte, NC

- *Professional Development Master Teacher*
- *Lead, Master Kindergarten Teacher*
- *Pre-K Lead Teacher.* Bright Beginnings Program
- *Coordinator/Family Educator,* Even Start Family Literacy Program. Developed, implemented, coordinated, and supervised all functions for a federal funded family literacy program. Developed curriculum and instructional practices for adult learners. Made assessments. Provided support and acted as a resource to staff and parents. Consulted with site teams and other family educators to establish program needs. Led/facilitated professional development sessions. Collaborated extensively with other agencies. Administered grants written and received. Supervised college interns.
- *Family Involvement Literacy Facilitator.* Promoted family/school partnerships. Modeled/demonstrated best practices in literacy strategies. Led/facilitated professional development activities. Assisted in program development and assessment of school-based literacy program. Assisted with writing the then new curriculum for CMS' Bright Beginnings Pre-K Program's Family-School Connection.
- *Volunteer Coordinator.* Developed, implemented volunteer leadership training. Coordinated volunteer placement. *Grant Developer.* Sought corporate sponsorship and partnership.
- *Parent Involvement Coordinator.* Provided family-based workshops, leadership in developing parent involvement plans for schools, work with school personnel to develop parent centers and establish community partnerships with schools.

EDUCATION AND PROFESSIONAL ACHIEVEMENTS

M. Ed, Cleveland State University, *magna cum laude*

B.S., Ursuline College

Licensures: Birth-Kindergarten, Elementary, Curriculum and Instructional Specialist

Achievements: Teacher of the Year, STAR Teacher, Master Teacher, Parents as Teachers Certification, Professional Development Master Teacher

ADDITIONAL SCHOOL INVOLVEMENT

Facilitator, Faculty Advisory Council/also Teacher Advisory Council Representative

Co-Advisor, Student Council

Mentor, New Teachers

Facilitator, Safety and Wellness Cadre, Member of Cadre's Steering Committee

Facilitator, Math Cadre, Parent Involvement Cadre

Co-Facilitator, Community/Outreach Cadre

Member, Literacy Cadre; Instructional Advisory Committee; Discipline Committee

Member, Learning Assistance Team; Steering Committee; School Leadership Team

Staff Liaison to PTA, Chair, Nominating Committee

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: Pathways In Education- North Caroline (PIE-NC)
2. Full name: **Queen N. Thompson**

Home Address: **4933 Lawrence Orr Rd, Charlotte NC 28212**

Business Name and Address:

Telephone No.: **(704) 661-6568**

E-mail address: **Queencharlotte33@bellsouth.net**

3. Brief educational and employment history.

M.S. Ed. Southern Illinois University (Counseling Psychology)

B.A. Johnson C. Smith University (Sociology, Psychology, and History)

Social Worker in Public Assistance, Child Welfare and Protective Services

Juvenile Probation Officer

Educational Services Coordinator for Special Needs Children

Charlotte-Mecklenburg Schools Special Populations Coordinator

Director of Vocational Technical Education

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

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 based on a recommendation from one of my former educator colleagues. My vast experience with disenfranchised communities and youth was a match for the underserved demographic that Pathways' Schools have made a priority to serve. My passion has always been to serve impoverished communities, and low-achieving students. I understand that there are social contexts that contribute to low academic performance students. My mission has always been to address those issues coupled with ensuring access to quality education. Serving on this board will be a direct continuation of that work.

6. What is your understanding of the appropriate role of a public charter school board member?
- To work in tandem with the school's management agency to ensure that all aspects of the school are functioning at a high level. Operational and fiscal oversight, governing laws and policies, school personnel, and other aspects are all under the oversight purview of board members.**

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

I have served on various boards and committees over my professional career and as a part of my civic service. I have also founded and established various organizations that serve at-risk populations. This includes an Alcohol Treatment Center, DropOut Prevention Programs, and others. I wrote and was awarded grants for Tumbleweed (a shelter for handicapped adults), ACMI Shelter for Battered Women, and Crossroads Charter High School. I was recognized by Charlotte Mecklenburg Schools as a Ben Craig Outstanding Educator for innovative programs. I was also recognized by Governors James Martin and Pat McCrory.

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

I have specified skills in the areas of teaching, professional development, board governance, and organizational leadership. I have worked both in the traditional and non-traditional school models. I'm an experienced grant writer and fundraising campaign management is also a strength. My administrative skills will also serve the board effectively.

School Mission and Program

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

The mission and guiding beliefs of Pathways' In Education schools begin and end with the success of every student personally and educationally. Social Emotional Learning is a core principle of the school's method and approach. Every student is both capable of and worthy of empathy, compassion, and respect. No student should fail to be served.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at

2. What is your understanding of the school's proposed educational program?
The program is a blended model that espouses the flexibility to accommodate the specific needs of each student. The program is specifically designed for under-served youth, including dropout students, credit deficient students, and students for whom the traditional model doesn't work. Career Technical Education and workforce development in addition to college enrollment ensures success beyond high school.

3. What do you believe to be the characteristics of a successful school?
 - **Clarity of Vision and Goals**
 - **High Standards for school leadership and students**
 - **Quality instruction**
 - **Small class sizes**
 - **Strong education programs**
 - **Access to wrap-around-services**
 - **Community Participation**
 - **Sustained Outcomes**
 - **Fiscal Fitness**

4. How will you know that the school is succeeding (or not) in its mission?
Evaluations and established goals will be carefully examined to determine the strengths and areas of improvements. Quality control will be a key factor in determining the level of success. Proof of the success of the school's mission will ultimately be identified by student success and personal growth.

Governance

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

The Board will provide oversight and establish policies that will instruct and inform the school's operational functions. The board will monitor and provide oversight to every level of operation. Financial management will be one of the core areas of oversight to ensure fiscal responsibility. Academic and personnel evaluation, practices, policies, and procedures, conflict of interest/conflict resolution, along with carefully implementing metrics for overall sustainability will also be employed.

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

At the end of the first year of the establishment of the school will be met with successes and challenges. How well these challenges are mitigated will determine the measure of success the school has had in the first year of operation. If the school was fiscally responsible, students were successfully recruited and retained, quality teachers and staff were effectively hired and met specific metrics, as well as increased community affirmation, then the first year of operation will be successful.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at charter@ncps.org.

2. How will you know at the end of five years if the school is successful?
 - Sustained educational programming and implementation
 - Student, teacher and staff retention rates are high
 - Fiscal reporting is fluent, accurate and reflects responsible management
 - Community support gains traction
 - Students and parents are satisfied
 - Graduation rates trend upward
 - Services make an impact
 - Metrics show gains, improvements, and upward trends across the board

3. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
 - Establish policies that align with the mission and vision of the school
 - Clearly articulate expectations and standards
 - Provide regular trainings for board members, faculty and staff
 - Engage in best fiscal planning and management practices
 - Rigorous recruitment of students and qualified staff
 - Participate in school and community events

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

Unethical behavior will be met with zero tolerance. I would consult with the Board Chair and be guided by the policies that are in place to resolve such matters expeditiously.

*Please include the following with your Information Form

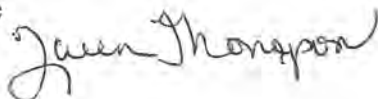
- a one page resume

*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, Queen N. Thompson, 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 PIE - Charlotte Charter School is true and correct in every respect.

Signature



Date

1-17-20

If you have questions regarding the application process, please contact the Office of Charter Schools via email at

Queen Norwood Thompson

educationsolute@bellsouth.net

Thompson was born in Charlotte, North Carolina and grew up in the District 4 school district. Thompson retired from Charlotte-Mecklenburg Schools where she monitored federal compliance and coordinated services for members of special populations. Thompson graduated from Johnson C. Smith University in Charlotte in 1968. She earned a master's in counseling psychology from Southern Illinois University and has also completed further graduate studies at the University of Delaware, University of Oklahoma, and the University of North Carolina. She has been a part-time instructor at Western Oklahoma Community College, Central Piedmont Community College, and has been a visiting co-instructor at the University of North Carolina at Charlotte.

Thompson became a social worker for Union County Department of Social Services in Monroe, North Carolina where she worked in public assistance and child welfare and protective services. She has also served as a juvenile probation officer as well as facilitated pre-release evaluations for the North Carolina Department of Corrections.

Thompson also performed public service work in Delaware, where she worked with the ACL-CIO Union Shop Steward for the State of Delaware Department of Social Services, certified and trained in Child Welfare and Protective Services by the National Center for Child Abuse and Protective Services in Denver, Colorado, and coordinated Education and Medical Services for multi-handicapped children, blind and deaf-blind children for the Delaware Bureau f/t Visually Impaired. Thompson has also worked as a clinical social worker for Oklahoma Department of Mental Health and as a hospital director of social work. She has been a member of the American Association of University Women, served as the Diversity chair for the State of North Carolina, served on the AAUW National Legal Advocacy Board, and as the chairperson of the Charlotte Branch NAACP Legal Redress Committee.

Thompson has a long documented history as an advocate for education reform and youth advocacy of underserved youth and young adult demographics.

Charter School Board Member Information Form

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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: **Pathways In Education- North Caroline (PIE-NC)**
2. Full name: **Patrice McClain Wright**

Home Address: **3201 Burbank Drive, Charlotte 28216**

Business Name and Address:

Telephone No.: **704-231-7444**

E-mail address: **patricewright@cms.k12.nc.us**

3. Brief educational and employment history.

Bachelor of Science – Accounting Hampton University
Master of Education – Curriculum and Supervision – UNC- Charlotte
Certification – Institutional Technology

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 after attending information sharing session and voicing my concern regarding the plight of under-served students in the West and East Charlotte communities. I received a call a week later inquiring about my desire and availability to serve on the founding board for Pathways in Education- North Carolina.

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 involves providing strategic direction for the school, fundraising activities, provide oversight and accountability, adopt policies and procedures that are relevant to the vision and direction of the school, ensure that the school meets and maintains all regulatory requirements and standards, and that the school is operating optimally in all aspects.
7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have served as the President of non-profit organization as well as on the Board of Managers for the YMCA. I'm also an educator in the Charlotte Mecklenburg Schools System.

8. Describe the specific knowledge and experience that you would bring to the board.
O bring an array of skills and knowledge to the board as an accountant and educator, and a curriculum expert. I will be proficient in regards to the financial operations of the school, educational program execution , administrative elements, and a keen knowledge of the demographic dynamic of under-served students that will be relevant in planning and executions.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
Pathways' mission is propelled by the belief that under-served students need to be discovered and recovers in the educational system. The mission is to identify areas where dropout rates are high and retention rates are low. The goal is to impact the mitigating factors that adversary affect the student's inability to academically successful. The mission extends to ensuring that each student is set on a course to be productive and maintain a sustainable lifestyle beyond high school graduation.
2. What is your understanding of the school's proposed educational program?
The school's proposed educational program includes a comprehensive curriculum that ensures that students achieve credit requirement for college entry or a workforce and career development program that prepares students for the workplace who choose not to

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attend college. The blended model approach is designed to facilitate the overall needs of the student to ensure successful integration and retention. The Social Emotional Learning foundation prepares students to excel in academics and life skills. Other components of the educational program such as the travel seminars, and other experiential learning opportunities enhances the student's overall educational experience.

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

The characteristics of a successful school are rooted in the core value to which the school embraces. These characteristics include an environment that nurtures and develops confident learners; transparent and effective leadership; consistent communication between school leadership, students and parents; equal access to educational opportunities; clearly stated accountability reequipments; fiscal integrity.

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

I know that the school is succeeding in its mission of elements of the clearly defined mission statements are successfully and consistently achieved. Teacher and student relationships will be strong, student will develop a trust for the learning environment in which they are served, and evaluations will be an important determining factor.

Governance

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

The role of the board involves providing leadership and direction through the establishment of policies that are informed nu state regulations. The board will serve as an oversight committee as a key role that ensures operational efficiency. Governance, financial and budgetary, proficiency, as well as other responsibilities and practices germain to the school's operations will be in the direct purview of the board.

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

A successful first year will mirror the success of the first class of students. Student academic success and tracking the personal growth of at-risk students will be a sign of success and mission accomplishments. Audit and evaluation will show the rate of success and expose any areas of improvement.

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

Five years will be a critical benchmark for determining the current state and future projected outcomes for the school. Five years would be enough time to work through any operational or programmatic issues and to determine a positive way forward. If, at the end of five years, the school had managed to have respectable graduation rate, maintained an improved retention rate, increased the number of students, increased diversity within the student populations, broadened its overall capacity and bandwidth,

and remained operationally sound, I would have concluded that the first five years had been successful.

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

1. **A commitment to actively participate in school's financial success**
2. **Develop a mission statement that is clear and definitive**
3. **Ensure opportunities for professional development**
4. **Establish tracking measures for success and mediation**
5. **Set the tone for excellence and accountability**
6. **Ensure that state requirements and standards are followed**
7. **Advocate for the school in the community**

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?

The PIE-NC By-Laws should provide for a process by which a board member should be handled in light of unethical practices that could be detrimental to the reputation and/or operations of the school. I would respond and process accordingly.

*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, Patrice McClain Wright, 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 PIE - Charlotte Charter School is true and correct in every respect.

Patrice M Wright 7/21/2020
Signature Date

If you have questions regarding the application process, please contact the Office of Charter Schools via email at

Patricia McClean Wright

3203201 BURBANK DRIVE, CHARLOTTE, NC 28216
704-231-7444 PATRICE.WRIGHT@CMS.K12.NC.US

Work Experience:

CAREER DEVELOPMENT COORDINATOR INDEPENDENCE HIGH SCHOOL

AUGUST 2014 - PRESENT

- Primary focus placed on developing a path for students after high school, both career and educational. Focused on dual enrollment for students to participate in post-secondary classes while in high school to give them options after high school. Served as a member of the Principal's Advisory Board to make critical site-based decisions.

INSTRUCTIONAL ACCOUNTABILITY FACILITATOR HAWTHORNE HIGH SCHOOL

AUGUST 2005 – AUGUST 2014

- Responsible for facilitating the administration of all state and national tests. Maintained data relative to school improvement and student achievement. Served as a part of the administrative team to ensure safety and instruction in the school.

BUSINESS EDUCATION TEACHER WEST CHARLOTTE HIGH SCHOOL

AUGUST 2002 – AUGUST 2005

- Provide all students with the best education available anywhere, preparing every child to lead a rich and productive life in the 21st century. Establish learning objective consistent with the North Carolina Standard Course of Study. Plan and utilize instructional methods, resources, and evaluation techniques which motivate and enable each student to achieve learning objectives.

RATER EDUCATIONAL TESTING SERVICE

MARCH 2008 – PRESENT

- Scored the following projects as a rater: NBCT, CAHSEE, Praxis PLT, Texas STAAR, Missouri MoPTA Elementary, CAASPP, CELLA, PPST, HSTW, CTP4, MET, FfT

SCORING LEADER EDUCATIONAL TESTING SERVICE

APRIL 2012 – PRESENT

- Managed a team of raters, checking for accuracy, punctuality and assisting with a basic understanding of holistic scoring: CAHSEE, Texas STAAR, MET, FfT

RATER PEARSON

MARCH 2010 – PRESENT

Scored the following projects as a rater: VA SOL, SAT, ARIZONA AIMS, ACT Aspire, HSE

Education:

- CERTIFICATION – INSTRUCTIONAL TECHNOLOGY • MAY, 2016 • EAST CAROLINA UNIVERSITY
- MASTER OF EDUCATION – CURRICULUM AND SUPERVISION • MAY, 2005 • UNIVERSITY OF NORTH CAROLINA AT CHARLOTTE
- BACHELOR OF SCIENCE - ACCOUNTING • MAY 1993 • HAMPTON UNIVERSITY

Volunteer Experience or Leadership:

- Alpha Kappa Alpha Sorority, Incorporated
Alpha Lambda Omega Chapter – President 2010 – 2013 Western Carolina Cluster Coordinator
2015 – 2016
- The Links, Incorporated
- Chapter Treasurer 2014 – Present
- YMCA Board of Managers McCrorey Branch
- Christian Emphasis Committee Chairman 2017 – Present
- Academy of Engineering Advisory Board

Charter School Board Member Information Form

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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: Pathways In Education- North Caroline (PIE-NC)

2. Full name: **Kathleen Hoskin Tunson**

Home Address: **1918 Mountain Park Drive, Charlotte NC**

Business Name and Address:

Telephone No.: **(704) 201-6291**

E-mail address: **ktunson@gmail.com**

3. Brief educational and employment history.

B.A. Communications-Mississippi State University,

MBA Marketing- in progress MSU

Marketing Communications Director-TIAA-CREF, Web Publications Editor-Carolina Healthcare Systems, VP Brand and Communications-Bank of America

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?

Recruitment:

If you have questions regarding the application process, please contact the Office of Charter Schools via email at

2. What is your understanding of the school's proposed educational program?
The foundation of the education is Social Emotional Learning. This is the holistic approach for focusing on dropout recovery and preparing these students for academic success and post-high school viability. PIE-Charlotte will employ a blended learning model that will be designed for the needs of each student. Serving special populations, underserved and disadvantaged youth, and recovering students who lack credits is at the core of the targeted demographics. Wrap-around services and a strong Workforce and Career Development program will fortify the educational program.
3. What do you believe to be the characteristics of a successful school?
A clear and well communicated vision; High standards and expectations for faculty, students and parents; collaboration between the community, the school, and parental involvement; curriculum and instruction aligned with state guidelines; fiscal and operational integrity; frequent assessments and evaluations; manageable classroom sizes; realistic yet ambitious goals.
4. How will you know that the school is succeeding (or not) in its mission?
Personal and academic progress of the student population will be measured and a key determining factor. Working in tandem with the Charlotte Mecklenburg school district and ensuring that the student body reflects the community demographics. The satisfaction of students, the parents, and the community will reflect the success of our mission.

Governance

1. Describe the role that the board will play in the school's operation.
The board will be tasked with the stringent fiscal oversight of the school. This includes budget projections and approvals. Oversight will also be given to personnel management and hiring practices. Policy development will also be an important responsibility in the school's operation,
2. How will you know if the school is successful at the end of the first year of operation?
 - **Public health and safety of students, faculty and staff is at a high level**
 - **Recruitment goals are achieved**
 - **Instruction is at a high quality and aligned with state standards**
 - **Academic success is being measured and achieved**
 - **Programs are operating efficiently**
 - **Fiscal integrity is at a high level**
3. How will you know at the end of five years of the schools is successful?
 - **Enrollment goals continue to be met**
 - **State test proficiency trends upward**
 - **Graduation rates are steadily increasing**
 - **Fiscal goals and funding goals are achieved**

If you have questions regarding the application process, please contact the Office of Charter Schools via email at

I was made aware by some of my professional peers regarding the intention of a Pathways School coming to Charlotte. I was recruited because of my background in Marketing and Communications as a important role for community engagement efforts. More than that, I know firsthand what PIE-Charlotte would mean in our community. I have worked as a youth advocate in Charlotte for over 20 years. I have always been committed to advocating for underserved youth and young adults as well as for educational equality.

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 includes providing strategic vision for the school, fiscal and operational oversight, hiring strong leaders , and being an instrument of the overall checks and balances for the entire operation of the school. In addition, being a voice in the community for the school, students, and parents is also a key role to ensure the success of the school.
7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have served on the board of several civic and charitable organizations, including my sorority. I have also chaired several committees at my church. My expertise in communications, marketing, and branding brings a unique skillset to the table. Public relations will be a crucial aspect for the growth and sustainability of the school's success. I will be able to lend my background and my skills comprehensively in that area in particular.

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

My background is in the areas of public relations, communications, marketing and branding at a high level. I also have experience in accounting and being responsible for the management and implementation of large budgets for large corporations. My knowledge of strategic planning processes, business planning, financial management, strategic marketing and branding will be used not only to ensure the success of the school from an institutional aspect, but also from an effective community outreach and engagement standpoint. Information systems and technology are also areas of expertise that will prove helpful.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
The guiding principles of Pathways is what impressed me the most. The belief that every young person deserves an opportunity for a quality education no matter what their background is. Disadvantaged youth are deserving of being afforded the chance to realize their potential and see their dreams manifest. A holistic approach to education will produce academic success.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at

- Parent and Community Involvement increases
- College entry increases

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

5.

The recruitment of a success school leader in the person of the principle is crucial. Hiring teachers and staff who are not only qualified but who embody the guiding beliefs of Pathways is also important. The board will need to be engaged in organizing community-in-schools events, leverage networks, strategically plan forward, and maintain the best practices operationally and instructionally.

6. 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 adhere to the guidelines and policies in the conflict resolution policy. I would first share my concerns with the Board Chair, and then bring the matter before the board.

*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, Kathleen Turson, 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 PIE-Charlotte Charter School is true and correct in every respect.

Kathleen Turson
Signature

7-22-20

Date

Work Experience:

PROFILE: Innovative **Marketing Communications and Business Professional** with over 20 years' of experience in B2B, B2C and internal communication. Areas of expertise include: project/campaign management; team/agency management; integrated marketing strategy/planning; public relations; event planning, online/social media marketing; and, readiness/change management (internal) communication.

WORK HISTORY: ***Xylem, Inc./Spectraforce, Charlotte, N.C., August 2018 – on-going***

Communications Manager/Project Manager – Contract role for Spectraforce. Primary responsibilities include managing internal and external product marketing and communication activities for the Applied Water Technologies division of Xylem, Inc. Activities managed include: writing promotional brochure and web content, developing technical brochures and IOMs, competitive analysis, organizing technical specifications for web and product communication, developing product training presentations, internal readiness communication/bulletin announcements, developing FAQs/product talking points, coordinating product displays for tradeshow and events, scheduling and coordinating product training and managing product content on SharePoint sites.

Ariel MarCom & Events, Charlotte, N.C., 2012 – 2018 (small business/consultant)

Consultant - Founder of a home-based marketing communication, consulting and event planning company. Provide fully integrated B2B and B2C marketing communication and event planning services including: employee/internal communication, project management, brand strategy/marketing, public relations, advertising, online/e-marketing (e-mail, search engine, banner advertising, and social media), newsletter, presentations, internal reporting, and trade show & event planning.

Aldersgate/Asbury Care Center, Charlotte, N.C., June 2017 –November 2017

Director, Transitional Care/Marketing Communications Manager – Full-time role designed to help create awareness of the new Asbury Health & Rehabilitation Center at Aldersgate. Primary responsibilities included promoting new facility within medical community, developing internal/external marketing plan, coordinating internal training, developing internal and external brochures, web content, online advertising, welcome packages, patient/family surveys, and coordinating tours/events.

TIAA/Accrue Partners, Charlotte, N.C., February 2016 –September 2016

Sr. Marketing Communications Manager/Readiness Lead – Contract position for Accrue Partners. Primary responsibilities included leading the “participant” communication readiness (internal) activities for the money market reform project team. Responsibilities included managing internal readiness communication status/ updates; written and verbal updates to cross functional teams; developing PowerPoint presentations; executive level reporting and briefings; as well as writing articles, frequently asked questions, talking points, and learning guides for client facing teams.

Wells Fargo Co., Inc./Apex Systems, Inc., Charlotte, N.C., February 2015 – February 2016

Project Manager/Marketing Communications Manager – Contract position for Apex Systems, Inc. Primary responsibilities included managing internal marketing communications initiatives and overall communications project plans for Wells Fargo's Global Banking, Treasury Management Market Delivery Team. Projects included internal and external communication such as training materials (learning guides, courses, videos), collateral, RFP library, banker and customer communications, and, general marketing (fact sheets, email, direct mail and online marketing).

Marketing Communications Director/Program Manager – 2009 – 2011. Served in newly defined role combining the client facing role of the program manager and skills of an experienced marketing communications professional for TIAA-CREF's 529 products. Served as primary contact between state clients (State Treasurers/Treasurers staff), internal business partners and external agencies to ensure branding, legal content, messaging and primary objectives were consistently and successfully implemented across state marketing communication initiatives. Developed marketing plans and managed integrated B2B and B2C campaigns (traditional and online)/promotions, monthly/quarterly reporting, local and national marketing and public relations agencies, legal review/content, lead generation, retention campaigns, community events and internal marketing budgets. Directly responsible for internal change management communication targeting employees including: readiness phone calls/team updates; writing internal newsletter articles, Frequently Asked Questions, phone center scripts, PowerPoints, SharePoint content and banner ads. Managed campaigns using marketing automation software and SharePoint. **Milestones: successfully launched TIAA-CREF's first Spanish 529 College Savings Website (Connecticut), brochures and print ad (Connecticut); and, launched and enhanced the successful "DreamBig" competition targeting and awarding talented elementary aged students with a monetary award to start a 529 college savings plan.**

LICENSING: *Project Management Plus Certificate Program* from Central Piedmont Community College (Project Management Professional Exam scheduled in Q4 2018). Previously held licenses include: *Series 6, Series 63, Life and Accident & Health or Sickness Insurance.*

EDUCATION: Mississippi State University, Mississippi State Mississippi. BA in Communications with emphasis in public relations. Currently working on MBA with emphasis in marketing.

RELEVANT ACCOMPLISHMENTS:

- Received an award for branding an effective internal marketing communication campaign at Verbatim Corporation (1997).
- Developed a direct mail campaign that played a major role in a 35% increase in sales; developed a consistent corporate brand for internal sales literature/training materials; created product names for tape/imaging products; and, received awards for outstanding work and commitment to detail Verbatim Corporation (1996-1998).
- Developed the strategy and launch of TIAA-CREF's 529 College Savings Plan first multi-touch, e-mail campaign targeting new/existing clients across 7 states (first deployment generated over \$2 million in sales – 2006/2007).
- TIAA-CREF corporate recognition award for the development and launch of the Connecticut 529 program's first Spanish website, phone scripts, marketing collateral targeting Hispanic speaking residents and supporting internal tools. (2010).
- Appointed as the Local Host Committee Chair (Project Manager) for the National Baptist Convention's, Pre-Convention Musical, *The Carolinas Worship Experience* (2,000+ attendees, 200 voice choir, two programs - 2013).
- Recognized for the successful execution and launch of Georgia's 529 program's first rebranding initiative (agency selection/management, focus groups, new logo/program name and campaign/content development). (2008/2009).
- Recognized for efficient management of corporate exhibits at major tradeshow such as Comdex, AIIM, IT Expo, ASUG, and EXsite - booth design, on-site construction, sales/lead management and promotions. (Osprey/Verbatim Corporation)
- Recently received certificate for Central Piedmont Community College's Project Management Plus (PMP) Program. (Target completion of PMP Exam is October 2019).

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

Pathways In Education – North Carolina

**BYLAWS
OF
PATHWAYS IN EDUCATION — NORTH CAROLINA, INC.
A North Carolina Nonprofit Corporation**

**ARTICLE I
PURPOSE AND DEFINITIONS**

SECTION 1. The purposes for which the Corporation is organized are to engage in all lawful activities in which nonprofit Corporations may engage under the North Carolina Nonprofit Corporation Act.

**ARTICLE II
OFFICES**

SECTION 1. NAME. The name of the corporation shall be Pathways in Education – North Carolina, Inc. (Hereinafter, the “Corporation” or “School”.)

SECTION 2. PRINCIPAL OFFICES. The Corporation’s principal office shall be located at such place in Charlotte-Mecklenburg County, North Carolina or elsewhere as the Board of Directors (the “Board”) shall from time to time determine. The Board is granted full power and authority to change the location of the Corporation’s principal office.

SECTION 3. REGISTERED OFFICE. The registered office of the Corporation required by law to be maintained in the State of North Carolina may be, but need not be, identical to the principal office of the Corporation. The address of the registered office may be changed from time to time by the Board of Directors.

SECTION 4. OTHER OFFICES. The Board of Directors or the President may at any time establish branch or subordinate offices at any place or places where the Corporation is qualified to do business.

**ARTICLE III
MEMBERS**

SECTION 1. MEMBERS. There shall be no members in the Corporation unless provisions for them are later made through an amendment to the Articles of Incorporation.

**ARTICLE IV
BOARD OF DIRECTORS**

SECTION 1. MANAGEMENT. The Board shall manage the business and affairs of the Corporation. The powers of the Corporation shall be exercised by the Board except as otherwise authorized by statute, the Articles of Incorporation, these Bylaws, and resolutions duly adopted by the Board.

SECTION 2. NUMBER OF DIRECTORS. The Board of the Corporation shall consist of seven (7) persons with each director holding a Board Seat Number out of seven (7) Board Seat Numbers. Board Seat Numbers will be assigned at the time each Director is appointed to the initial Board, unless changed by a duly adopted amendment to these Bylaws. The composition of the Board of Directors shall accurately reflect the demographics of the communities served by the public charter school operated by the Corporation and include a board cross-section of skills deemed necessary by the Board to properly govern the operations of the Corporation.

SECTION 3. DESIGNATION OF DIRECTORS. The Corporation's charter management organization, Pathways Management Group, Inc. ("PMG") will assist the Board in facilitating an election process. Initial Board Members will be assigned the seven (7) Board Seat Numbers. Subsequent prospective Director candidates shall be reviewed by PMG and presented to the Board for election at the last Board of Directors Meeting of each school year. PMG will assist the Board in facilitating the election process by reviewing all nominees. Nominations will be solicited by PMG during a two (2) week period commencing approximately one (1) month prior to the last Board of Directors Meeting of each school year (hereinafter referred to as the "Nomination Window").

Nominations for prospective candidates submitted during the Nomination Window will be accepted from all sources including, but not limited to, nominations by teachers, staff, students, parents/guardians, community members, charter authorizer, and current and former directors and officers of the Corporation. All nominees seeking to serve on the Board must clear a criminal background check including a criminal history review prior to being presented to the Board on the slate of candidates for election.

Following review of each nominee's qualifications and clearance of a criminal background check, PMG will prepare a slate consisting of the top three (3) candidates per Board Seat Number for the Board's review. If a current Director is seeking to serve on the Board in the following school year, then that Director will be included as one of the three candidates on the slate of directors proposed for the following school year. If PMG receives less than three nominations for any Board Seat Number, then all the nominees for that Board Seat Number will be included on the slate of candidates for the Board's review. Board Seat Number 7 shall be appointed by PMG.

Each current Director serving in Board Seat Numbers 1 through 6 shall be eligible to place only one vote per Board Seat Number, with the exception of each Director's own Board Seat Number. The Director serving in Board Seat Number 7 shall not participate in the voting for election or appointment of any directors for any of the Board Seat Numbers. Voting will be done as follows:

- **Board Seat Number 1** – Directors serving in Board Seat Numbers 2, 3, 4, 5 and 6 may vote to elect a director to Board Seat Number 1.
- **Board Seat Number 2** – Directors serving in Board Seat Numbers 1, 3, 4, 5 and 6 may vote to elect a director to Board Seat Number 2.
- **Board Seat Number 3** – Directors serving in Board Seat Numbers 1, 2, 4, 5 and 5 may vote to elect a director to Board Seat Number 3.

- **Board Seat Number 4** – Directors serving in Board Seat Numbers 1, 2, 3, 5 and 6 may vote to elect a director to Board Seat Number 4.
- **Board Seat Number 5** – Directors serving in Board Seat Numbers 1, 2, 3, 4 and 6 may vote to elect a director to Board Seat Number 5.
- **Board Seat Number 6** – Directors serving in Board Seat Numbers 1, 2, 3, 4 and 5 may vote to elect a director to Board Seat Number 6.
- **Board Seat Number 7** – Director serving in Board Seat Number 7 shall not participate in the voting for election or appointment of any directors for any of the Board Seat Numbers.

Incoming Directors shall have an effective start date of the first day after the conclusion of the current school calendar year. No Director of this Corporation may simultaneously serve as a Director or Officer of PMG.

SECTION 4. TERM OF OFFICE. Each Director shall serve for a one (1) year term and there is no limitation on the number of consecutive terms a Director may serve subject to North Carolina charter school law.

SECTION 5. COMPOSITION OF THE BOARD OF DIRECTORS. The composition of the Board of Directors shall accurately reflect the demographics of the communities served by the public charter school(s) operated by the Corporation and include a broad cross-section of skills deemed necessary by the Board to properly govern the operations of the Corporation.

SECTION 6. VACANCIES. A vacancy or vacancies shall be deemed to exist in the event of the death, resignation or removal of any Directors from office. In the event that such office is declared vacant, PMG will solicit nominations to fill the vacancy on the Board during a two (2) week period commencing immediately upon the vacancy. Thereafter, a new Director to fill the unexpired portion of the term and to hold the Board Seat Number of the Director whose office was declared vacant shall be appointed by a majority vote of the Board then in office from a slate of candidates presented pursuant to the process required in Section 3 of this Article IIV for the designation of directors.

SECTION 7. RESTRICTION ON INTERESTED PERSONS AS DIRECTORS. No Director shall own any interest in any vendor or other third party entity with which the Corporation engages in any business or contractual relationship of any kind.

SECTION 8. REMOVAL OR RESIGNATION OF DIRECTORS. Except as otherwise required by law any Director of the Corporation may resign at any time by giving written notice to the Board or to the President or to the Secretary of the Corporation. Such resignation shall take effect at the time not more than thirty (30) days after such receipt as specified in such notice, or on receipt of the notice if no time is specified. Unless otherwise specified in the notice of resignation, no acceptance of such resignation shall be necessary to make it effective.

Except for a Director appointed by PMG as set forth in Section 3 of these Bylaws, a Director may be removed from office for cause by a two-thirds vote of the Directors then in office (not merely a quorum of those present). Cause to remove a Director shall be defined as (1) dereliction of his/her duties, (2) mental incapacity, (3) engaging in conduct that adversely affects

the integrity or reputation of the school, (4) if convicted of a misdemeanor or felony, with the exception of convictions for minor traffic offenses, or (5) if a Director misses two consecutive regular Board meetings and fails to appear at the next regular Board meeting.

Notwithstanding, a Director may not resign nor be removed if such resignation or removal would cause the Corporation to be left without a duly appointed Director or Directors in charge of the Corporation's affairs.

SECTION 9. POWERS. Except as otherwise provided in the Articles of Incorporation or in these Bylaws, all the corporate powers shall be and are hereby vested in and shall be exercised by the Board of Directors. The primary function of the Board of Directors is to set policy and provide general oversight of the School's operations, rather than manage its day-to-day operations. Specifically, this includes the following:

- (a) To provide general leadership and direction;
- (b) To formulate policies that promote the School's mission and objectives;
- (c) To govern the School in accordance with federal and state laws;
- (d) To facilitate communication with the community;
- (e) To ensure that the School is effectively managed and staffed;
- (f) To oversee and assure proper financial and operational practices
- (g) To ensure that sufficient funds and other support are sought and secured to provide for short-and long-term needs; and
- (h) To retain necessary expertise, consulting, and contractor services and training.

SECTION 10. PLACE OF MEETINGS. Regular meetings of the Board may be held at any place within or outside the State of North Carolina designated from time to time by resolution of the Board. In the absence of any such designation, regular meetings shall be held at the principal executive office of the Corporation. Special meetings of the Board shall be held at any place within or outside the State of North Carolina that has been designated in the notice of the meeting or, if not stated in the notice or there is no notice, at the principal executive office of the Corporation.

SECTION 11. ANNUAL MEETING. The Board of Directors shall hold an annual meeting each year on a date and at a time designated by the President or the Board of Directors.

SECTION 12. REGULAR MEETINGS. The Board of Directors shall hold regular meetings at such times as are designated by the Board of Directors.

SECTION 13. SPECIAL MEETINGS. Special meetings of the Board of Directors for any purpose or purposes may be called at any time by, the President of the Corporation or a

majority (51 percent) of the Board of Directors. The specific purpose must be stated in the notice, and no other business shall be transacted at the special meeting. Unless actual notice is not required by the laws of the State of North Carolina or these Bylaws for the validity of the Directors' actions at any such special meeting, notice must be given not less than forty-eight (48) hours prior to any special meeting. Such notice may be given by any usual means of communication. Meetings shall be held at a place and at such time as shall be fixed by the President or Directors calling the meeting.

SECTION 14. EMERGENCY MEETINGS. When urgent circumstances arise, the Board of Directors may meet on less than twenty-four (24) hours' notice in accordance with the North Carolina Non-profit Corporations Act. Board members and the public shall be given notice in compliance with open meeting laws. At such meetings the Board may only conduct business related to the purpose(s) for which the meeting was called.

SECTION 15. ACTIONS WITHOUT MEETINGS. Any action required or permitted to be taken by the Board of Directors at a meeting may be taken without a meeting by vote of the Directors to a communication describing the action proposed, and signed by or affirmed by receipt of e-mail or other reasonable communication from each Director, filed with the Board Secretary and included in or filed with the corporate records. For the purpose of this Article, "written consent" includes consent by members of the Board in electronic form and delivered by electronic mail or other reasonable communication. Any Board action without a meeting shall conform to all open meetings notice and public records requirements under state law. Action taken under this section is effective when the last director returns his/her consent form, unless the consent form specifies a different effective date.

SECTION 16. OPEN MEETINGS AND PUBLIC RECORDS LAWS. All meetings of the Board shall at all times comply with Article 33C of Chapter 143 (Open Meetings) and Chapter 132 (Public Records) of the North Carolina General Statutes (and any subsequently amended provisions related to those statutes).

SECTION 17. QUORUM. Except as otherwise provided by law or by the Articles of Incorporation or these Bylaws, the acts of a majority of the Directors present at a meeting at which a quorum is present shall be the acts of the Board. A majority of the Board of Directors present at a meeting shall constitute a quorum for the transaction of business, except to adjourn. Every act or decision done or made by a majority of the Directors present at a meeting duly held at which a quorum is present shall be regarded as the act of the Board of Directors.

SECTION 18. ATTENDANCE BY REMOTE COMMUNICATION. Any or all Directors and Officers may participate in a meeting by, or conduct the meeting through the use of, any reasonable and legal means of communication by which all Directors participating in the meeting may simultaneously hear each other during the meeting. A Director participating in a meeting by this means is deemed present in person at the meeting unless otherwise determined by the Board or required by law.

SECTION 19. FEES AND COMPENSATION OF DIRECTORS. Directors shall not receive compensation for their services, but may be reimbursed reasonable actual expenses

incurred in connection with their service as Directors. Directors shall not solicit or accept personal gifts from any person or entity doing business, or seeking to do business, with the charter school.

ARTICLE V OFFICERS

SECTION 1. OFFICERS. The officers of the Corporation shall be a President, Secretary, and a Treasurer. Any number of offices may be held by the same person except as otherwise provided in the Articles of Incorporation or in these Bylaws.

SECTION 2. ELECTION OF OFFICERS. The Officers of the Corporation, except such Officers as may be appointed in accordance with the provisions of this Article V, Section 4, shall be chosen by the Board of Directors, and each shall serve at the pleasure of the Board. Officers shall assume their duties immediately upon election and shall serve for a one (1) year term and until their successors are duly elected and qualified, unless such terms are otherwise designated by separate resolution of the Board of Directors.

SECTION 3. REMOVAL AND RESIGNATION OF OFFICERS. Any Officer may resign at any time by giving written notice to the Corporation. Any resignation shall take effect on the date of receipt of that notice or at any later time specified in that notice; and, unless otherwise specified in that notice, the acceptance of the resignation shall not be necessary to make it effective. Any resignation is without prejudice to the rights, if any, of the Corporation under any contract to which the officer is a party.

Subject to the rights, if any, of an Officer under any contract of employment, any Officer may be removed, with cause, by the Board at any regular or special meeting of the Board, by a majority vote of a quorum of the Board. Cause to remove an Officer shall be defined as (1) dereliction of his/her duties, (2) mental incapacity, (3) engaging in conduct that adversely affects the integrity or reputation of the school, and (4) if convicted of a misdemeanor or felony, with the exception of convictions for minor traffic offenses.

Subject to the rights, if any, of an Officer under any contract of employment, any Officer may be removed, without cause, by the Board at any regular or special meeting of the Board, by a two-thirds vote of the Directors then in office (not merely a quorum of those present at a meeting).

SECTION 4. VACANCY IN THE OFFICE OF THE PRESIDENT. A vacancy in the office of the President because of death, resignation, removal, disqualification or any other cause shall be immediately filled by the Secretary and then the Treasurer.

SECTION 5. VACANCY IN ALL OTHER OFFICES. A vacancy in any office other than that of the President, because of death, resignation, removal, disqualification or any other cause shall be filled in the manner prescribed in these Bylaws for regular appointments to that office.

SECTION 6. PRESIDENT. The President of the Corporation shall, subject to the control of the Board of Directors, have the general powers and duties of management usually vested in the office of President of a Corporation, and shall have such other powers and duties as may be prescribed by the Board of Directors or the Bylaws.

SECTION 7. SECRETARY. The Secretary shall keep or cause to be kept, at the principal executive office or such other place as the Board of Directors may direct, a book of minutes of all meetings and actions of Directors, with the time and place of holding such meeting, whether regular or special, and, if special, how authorized, the notice given, the names of those present. The Secretary shall keep or shall cause to be kept, at the principal office a copy of the Articles of Incorporation. The Secretary shall give, or cause to be given, notice of all meetings of the Board of Directors required by the Bylaws or by law to be given, and shall keep the seal of the Corporation, if one be adopted, in safe custody, and shall have such other powers and perform such other duties as may be prescribed by the Board of Directors or by the Bylaws.

SECTION 8. TREASURER. The Treasurer shall keep and maintain, or cause to be kept and maintained, adequate and correct books and records of accounts of the properties and business transactions of the Corporation, including accounts of its assets, liabilities, receipts, disbursements, gains, and losses. The books of account shall at all reasonable times be open to inspection by any Director.

The Treasurer shall deposit or cause to be deposited all moneys and other valuables in the name and to the credit of the Corporation with such depositories as may be designated by the Board of Directors. He or she shall disburse or cause to disburse the funds of the Corporation as may be ordered by the Board of Directors, shall render to the President and Directors, whenever they request it, an account of all of his or her transactions as Treasurer and of the financial condition of the Corporation, and shall have other powers and perform such other duties as may be prescribed by the Board of Directors or the Bylaws.

SECTION 9. FEES AND COMPENSATION OF OFFICERS. Officers shall not receive compensation for their services but may be reimbursed for reasonable expenses incurred in connection with their service as Officers.

**ARTICLE VI
INDEMNIFICATION OF DIRECTORS, OFFICERS, EMPLOYEES
AND OTHER AGENTS**

The Corporation shall, to the maximum extent permitted by the North Carolina Nonprofit Corporation Law, hold harmless and defend each of its agents against expenses, judgments, fines, settlements and other amounts actually and reasonably incurred in connection with any proceeding arising by reason of the fact any such person is or was an agent of the Corporation if such person was found by the Board to be acting in good faith and in a manner such person reasonably believed to be in the best interests of the Corporation, and, in case of a criminal proceeding, had no reasonable cause to believe the conduct of such person was unlawful. For purposes of this Section, an "agent" of the Corporation includes any person or entity who is or was a Director, Officer, employee, or other agent of the Corporation, or is or was serving at the request of the Corporation

as a Director, Officer, employee, or agent of another Corporation, partnership, joint venture, trust, or other enterprise, or was a Director, officer, employee, or agent of a corporation which was a predecessor corporation of the Corporation or of another enterprise at the request of such predecessor corporation.

ARTICLE VII RECORDS AND REPORTS

SECTION 1. MAINTENANCE AND INSPECTION OF BYLAWS. The Corporation shall keep at its principal executive office, or if its principal executive office is not in the State of North Carolina, at its principal business office in this state, the original or a copy of the Bylaws as amended to date. The Corporation's annual tax returns shall also be available for public inspection at the Corporation's principal office during regular business hours.

SECTION 2. MAINTENANCE AND INSPECTION OF OTHER CORPORATE RECORDS. The accounting books and records and minutes of proceedings of the Board of Directors shall be kept at such place or places designated by the Board of Directors, or, in the absence of such designation, at the principal executive office of the Corporation. The minutes shall be kept in written form and the accounting books and records shall be kept either in written form or in any other form capable of being converted into written form.

SECTION 3. INSPECTION BY DIRECTORS. Every Director shall have the absolute right at any reasonable time to inspect all books, records, and documents of every kind and the physical properties of the Corporation, and the records of any subsidiary of the Corporation. This inspection by a Director may be made in person or by an agent or attorney and the right of inspection includes the right to copy and make extracts of documents.

SECTION 4. FINANCIAL STATEMENTS. A copy of any annual financial statement and any income statement of the Corporation for each quarterly period of each fiscal year, and any accompanying balance sheet of the Corporation as of the end of each such period, that has been prepared by the Corporation shall be kept on file in the principal executive office of the Corporation.

SECTION 5. ANNUAL REPORT. An annual report will be sent to the Directors within 120 days after the end of the Corporation's fiscal year, or at the Directors' Annual Meeting. The report shall contain the following information, in appropriate detail:

- (a) The assets and liabilities, including the trust funds, of the Corporation as of the end of the fiscal year;
- (b) The principal changes in assets and liabilities, including trust funds;
- (c) The Corporation's revenue or receipts, both restricted and unrestricted to particular purposes;
- (d) The Corporation's expenses or disbursements for both general and restricted purposes; and
- (e) An independent accountants' report, or if none, the certificate of an authorized officer of the Corporation that such statements were prepared without audit from the Corporation's books and records.

The requirement of an annual report shall not apply if the Corporation receives less than \$25,000 in gross receipts during the fiscal year, provided, however, that the information specified above for inclusion in an annual report must be furnished annually to all Directors who requests it in writing.

SECTION 6. ANNUAL STATEMENT OF INDEMNIFICATIONS. As part of the annual report to all Directors, or as a separate report if no annual report is issued, the Corporation shall, within 120 days after the end of the Corporation's fiscal year, annually prepare and furnish to each Director a statement of any indemnifications or advances aggregating more than \$10,000 paid during the fiscal year to any Officer or Director of the Corporation under Article VI of these Bylaws.

ARTICLE VIII GENERAL CORPORATE MATTERS

SECTION 1. CHECKS, DRAFTS, EVIDENCES OF INDEBTEDNESS. All checks, drafts, or other orders for payment of money, notes, or other evidences of indebtedness, issued in the name of or payable to the Corporation, shall be signed or endorsed by such person or persons and in such manner as, from time to time, shall be determined by resolution of the Board of Directors.

SECTION 2. CORPORATE CONTRACTS AND INSTRUMENTS; HOW EXECUTED. The Board of Directors, except as otherwise provided in these Bylaws, may authorize any Officer or Officers, agent or agents, to enter into any contract or execute any instrument in the name of and on behalf of the Corporation, and this authority may be general or confined to specific instances; and, unless so authorized or ratified by the Board of Directors or within the agency power of an Officer, no Officer, agent, or employee shall have any power or authority to bind the Corporation by any contract or engagement or to pledge its credit or to render it liable for any purpose or for any amount.

SECTION 3. 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 the Board of Directors. Such authority may be general or confined to specific instances. In accordance with G.S. 55A-8-32, no loan, guaranty, or other form of security shall be made or provided by the Corporation to or for the benefit of its Directors or Officers.

SECTION 4. CONSTRUCTION AND DEFINITIONS. Unless the context requires otherwise, the general provisions, rules of construction, and definitions in the North Carolina Nonprofit Corporation Law shall govern the construction of these Bylaws. The Corporation shall, however, be governed by a Board of Directors and any reference in said laws to "Directors" or to the "Board of Directors" shall be deemed to refer to said Board of Directors. Without limiting the generality of this provision, the singular number includes the plural, the plural number includes the singular, and the term "person" includes both a Corporation and a natural person.

ARTICLE IX

CONTRACTS WITH AND LOANS TO DIRECTORS AND OFFICERS

SECTION 1. CONTRACTS WITH DIRECTORS AND OFFICERS. No Director of this Corporation nor any other corporation, firm, association, or other entity in which one or more of this Corporation's Directors have a material financial interest, shall be interested, directly or indirectly, in any contract or transaction with the Corporation or any corporation in which this Corporation is a member or holds any ownership interest, unless as otherwise permitted under the North Carolina Nonprofit Corporations Law.

No Officer of this Corporation nor any other corporation, firm, association or other entity in which one or more of this Corporation's Officers have a material financial interest, shall be interested, directly or indirectly, in any contract or transaction with this Corporation or any corporation in which this Corporation is a member or holds any ownership interest, unless as otherwise permitted under the North Carolina Nonprofit Corporations Law.

SECTION 2. LOANS TO DIRECTORS AND OFFICERS. The Corporation shall not lend any money or property to or guarantee the obligation of any Director or Officer; provided, however, that the Corporation may advance money to a Director or Officer of the Corporation for expenses reasonably anticipated to be incurred in the performance of his or her duties if that Director or Officer would be entitled to reimbursement for such expenses by the Corporation.

ARTICLE X AMENDMENTS

New Articles of Incorporation or new Bylaws may be adopted or the existing Articles of Incorporation or Bylaws may be amended or repealed only by a supermajority vote of all Directors then in office (not merely a quorum of the Directors present at a meeting). All references to a super majority (herein defined as "Super Majority") in these Bylaws shall mean a minimum of eighty percent (80%) of all Directors then in office (not merely a quorum of the Directors present at a meeting).

ARTICLE XI CONFLICT OF INTEREST AND NEPOTISM

SECTION 1. GENERAL PROVISIONS. Directors shall avoid improper conduct arising from conflicts of interest and shall abide by all legal requirements governing conflicts of interest, including G.S. 55A-8-31. If any Director has or may have a conflict of interest in a matter pending before the Board, such member shall fully disclose to the Board the nature of the conflict or potential conflict. No transaction may be approved if it would constitute self-dealing. The Board shall also establish and implement policies conforming to other legal requirements, including state rules and policy pertaining to charter school conflicts of interest and nepotism practices.

ARTICLE XII DISSOLUTION AND DISTRIBUTION

SECTION 1. PROCEDURE. This Corporation may be wound up and dissolved upon a Super Majority vote of the Board of Directors (as defined in Article X).

SECTION 2. DISTRIBUTION OF ASSETS. The assets of the Corporation shall be distributed and allocated as provided herein. Any Corporation assets which are purchased with any public funds shall be distributed pursuant to North Carolina requirements as well as any other requirements provided under North Carolina law. Any assets acquired with private funds shall be distributed to such tax-exempt charitable organizations as may meet the general objectives and mission of the Corporation, or to a community foundation or other charitable organization which will carry out the Corporation's mission, in such manner as the Board of Directors deems reasonable and appropriate. Such termination and dissolution shall be subject to and bound by all then applicable rules of the Internal Revenue Code, and with such approval and consent as may be required by the Internal Revenue Service.

CERTIFICATE OF SECRETARY

I, the undersigned, do hereby certify:

(1) That I am the duly elected and acting Board Member of PATHWAYS IN EDUCATION – NORTH CAROLINA, INC.; and

(2) That the foregoing Bylaws, comprising eleven (11) pages, constitute the Bylaws of such corporation as duly adopted by the corporation as of the 16 day of July, 2020.

IN WITNESS WHEREOF, I have hereto subscribed my name this 23 day of July, 2020.

James H. Wilkes Jr.

BOARD MEMBER,
PATHWAYS IN EDUCATION – NORTH CAROLINA,
INC.

Appendix K – Articles of Incorporation Pathways In Education – North Carolina



NORTH CAROLINA

Department of the Secretary of State

To all whom these presents shall come, Greetings:

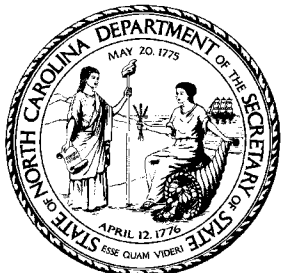
I, Elaine F. Marshall, Secretary of State of the State of North Carolina, do hereby certify the following and hereto attached to be a true copy of

ARTICLES OF INCORPORATION

OF

PATHWAYS IN EDUCATION-NORTH CAROLINA, INC.

the original of which was filed in this office on the 28th 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 28th day of August, 2019.

Elaine F. Marshall

Secretary of State

**ARTICLES OF INCORPORATION
OF
PATHWAYS IN EDUCATION – NORTH CAROLINA, INC.**
A North Carolina Nonprofit Corporation

Pursuant to N.C. Gen. Stat 55A-2-02, the undersigned corporation submits these Articles of Incorporations (“Articles”) for the purpose of forming a nonprofit corporation under the laws of the State of North Carolina.

ARTICLE I.

The name of the Corporation is Pathways in Education – North Carolina, Inc. a North Carolina Nonprofit Corporation

ARTICLE II.

The period of duration of the Corporation shall be perpetual

ARTICLE III.

The specific purpose of this Corporation is to engage in charitable and educational purposes.

ARTICLE IV.

The mailing address of the corporation is as follows:

320 North Halstead St. Suite 280
Pasadena, CA 91107 Los Angeles County

The name and address of the corporation's principal office and initial agent for service of process is:

Cogency Global
212 S Tryon Street, Ste. 1000
Charlotte, Nc 28281, Mecklenberg County
866.775.0114 Fax 866.775.0115

ARTICLE V.

The name and address of this corporation's incorporator is as follows:

David Hostetler, Esq.
4711 Hope Valley Road, Suite 4F-512
Durham, NC 27707, Durham County

ARTICLE VI.

The board of directors shall consist of no fewer than five (5) members. The names and addresses of the founding board of directors are:

Linda P. Marks Thomas
8615 Getalong Rd.
Charlotte, NC 29213

Apt. 2313
Charlotte, NC 28273

Brentela M. Daugherty
5 Stillhouse Place
Durham, NC 27704

James H. Wilkes, Jr.
6721 Barton Creek Dr.
Whitsett, NC 27377

Tara Gibbs
9224 Kings Parade Blvd.

Patrice McClain
3201 Burbank Dr.
Charlotte, NC 28216

ARTICLE VII.

The Corporation is intended to qualify as a tax-exempt, charitable, educational, scientific or literary organization within the meaning of Section 501 (c)(3) of the Code. The affairs of the Corporation shall be conducted in such manner as to qualify for tax exemption under that Code section and any related Code section. No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to its trustees, 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 the purposes set forth in these Articles of Incorporation.

No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation (provided, however, that the Corporation, in this regard, may, but is not required to, elect to be governed by the objective expenditure limits of Section 501(h) of the Code), 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.

ARTICLE VIII.

Upon the dissolution or winding up of the corporation, its assets remaining after payment, or provision for payment, of all debts and liabilities of this corporation shall be distributed to a nonprofit fund, foundation or corporation which is organized and operated exclusively for charitable purposes and which has established its tax exempt status under Section 501(c)(3) of the Code, or shall be distributed to the federal government, or to a state or local government, for public purposes. Any such assets not so disposed of shall be disposed of by the Court of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations as said Court shall determine which are organized and operated exclusively for such purposes.

ARTICLE IX.

The number, manner of election or appointment, the qualifications and the term of directors of the Corporation shall be as set forth in the bylaws of the Corporation adopted by the directors. Such provisions shall not be in conflict with the provisions and requirements of the North Carolina Nonprofit Corporation Act (as it may be amended from time to time).

ARTICLE X.

To the fullest extent permitted by the North Carolina Nonprofit Corporation Act and the North Carolina Business Corporation Act to the extent that it applies, no person who is serving or who has served as a director of the Corporation shall be personally liable to the Corporation for monetary damages for breach of duty as a director. No amendment or repeal of this Article, nor the adoption of any provision to these Articles inconsistent with this Article, shall eliminate or reduce the protection granted herein with respect to any matter that occurred prior to such amendment, repeal or adoption, 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 the Code.

ARTICLE XI.

In addition to the powers granted to corporations under the laws of the State of North Carolina, the Corporation shall have full authority to adopt bylaws, policies and programs for the regulation of its internal affairs and the conduct of its business in such form and method as are not in conflict with or in violation of such laws, except as prohibited by the provisions of these Articles.

ARTICLE XII.

These Articles shall be effective upon filing.

This is the 26th day of August 2019.

Signed: 

David Hostetler, Esq.
Incorporator

08/26/2019
Date: _____

Appendix L – Insurance Quotes

Pathways In Education – North Carolina

4.3 Civil Liability and Insurance

The Nonprofit shall name the SBE as an Additional Named Insured to their liability coverage for operation of a charter school while obtaining and maintaining insurance at a minimum in the following amounts:

- a. Errors and Omissions: one million dollars (\$1,000,000) per occurrence;
- b. General Liability: one million dollars (\$1,000,000) per occurrence;
- c. Property Insurance: For owned building and contents, including boiler and machinery coverage, if owned;
- d. Crime Coverage: no less than two hundred fifty thousand dollars (\$250,000) to cover employee theft and dishonesty;
- e. Automobile Liability: one million dollars (\$1,000,000) per occurrence; and
- f. Workers' Compensation: as specified by Chapter 97 of NC General Statute, Workers' Compensation Law.

1. Complete the table below, indicating the amount of each type of coverage as outlined in a quote obtained from an insurance provider.

Area of Proposed Coverage	Proposed Amount of Coverage	Cost (Quote)
Comprehensive General Liability	\$1,000,000.00/occurrence	\$1,788
Officers and Directors/Errors and Omissions	\$1,000,000.00/occurrence	\$400 (approx.)
Property Insurance		\$1,600 (approx.)
Automobile Liability	\$1,000,000.00/occurrence	\$96 (Hired & Non-Owned Auto Only)
Crime Coverage Minimum/Maximum Amount	\$250,000.00 \$250,000.00	\$483
Worker's Compensation	\$500,000	\$3,150 (approx.)
Other Coverage		\$963
Total Cost		\$8,245

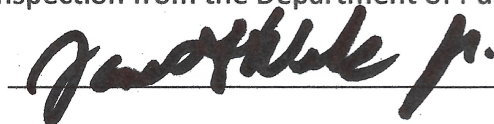
***Attach Appendix L: Insurance Quotes**

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

4.4 Health and Safety Requirements

All public charter schools are required to follow the regulations regarding health and safety as stated in G.S. 115C 218.75.

We, the Board members at Pathways In Education-North Carolina will develop a written safety plan and policies to be shared with staff, parents and students and be available upon inspection from the Department of Public Instruction and local Health Departments.



Board Chair Signature

7-22-20

Date

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.



Public Schools of North Carolina
State Board of Education
Department of Public Instruction

4.4 Health and Safety Requirements

All public charter schools are required to follow the regulations regarding health and safety as stated in G.S. 115C 218.75.

We, the Board members at Pathways In Education-North Carolina will develop a written safety plan and policies to be shared with staff, parents and students and be available upon inspection from the Department of Public Instruction and local Health Departments.


Board Chair Signature

7-18-20
Date

PROPOSAL FOR

Pathways In Education

New North Carolina Charter Coverage & Premium Indication



Prepared by:

Keith Miller

Vice President

1551 N. Tustin Ave., Suite 500

Santa Ana, CA 92705

T: 714.356-5151

Keith.Miller@nfp.com

July 20, 2020



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Commercial Property 4

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Crime 7

Errors & Omissions 8

Premium Summary 9



For informational purposes only This document does not amend, extend, or alter coverage. Please refer to any actual policy(s) for specific terms, conditions, limitations, and exclusions. Insurance services provided by NFP Property & Casualty Services, Inc. (NFP P&C), a subsidiary of NFP Corp. (NFP) and related NFP subsidiary companies. In California, NFP P&C does business as NFP Property & Casualty Insurance Services, Inc. License #0F15715. Neither NFP nor its subsidiaries provide tax or legal advice.

GENERAL LIABILITY

CARRIER Philadelphia Indemnity Insurance Company
A.M. BEST RATING A++ XV
POLICY PERIOD TBD

ADDITIONAL ANNUAL PREMIUM: \$2,130 (Indication Estimate)

COVERAGE DETAIL	LIMIT
General Aggregate – Applies per Location	\$2,000,000
Products/Completed Operations Aggregate	\$2,000,000
Each Occurrence	\$1,000,000
Personal and Advertising Injury	\$1,000,000
Fire Damage – Any One Fire	\$300,000
Medical Expense – Any One Person	\$5,000
Liquor Liability	\$1,000,000

SCHEDULE OF HAZARDS

CLASSIFICATION	EXPOSURE	PREMIUM BASIS
North Carolina		
School- Public- High Schools	600	Number of Students



SEXUAL OR PHYSICAL ABUSE OR MOLESTATION

CARRIER Philadelphia Indemnity Insurance Company
A.M. BEST RATING A++ XV
POLICY PERIOD TBD

ADDITIONAL ANNUAL PREMIUM: \$982 (Indication Estimate)

COVERAGE DETAIL	LIMIT
Aggregate Limit	\$1,000,000
Each Abusive Conduct Limit	\$1,000,000
Employee Defense Coverage	Included

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COMMERCIAL PROPERTY

CARRIER Philadelphia Indemnity Insurance Company
A.M. BEST RATING A++ XV
POLICY PERIOD TBD

ADDITIONAL ANNUAL PREMIUM: \$1,906 (Indication Estimate)

COVERAGE DETAIL

LOC #	SUBJECT	LIMIT	DED	VALUATION	CO-INS %	CAUSE OF LOSS
1-1	Building / TIB	\$650,000	5,000	Replacement Cost	100%	Special (Including theft)
1-1	Business Personal Property	\$150,000	5,000	Replacement Cost	100%	Special (Including theft)
1-1	Computers	\$32,400	5,000	Replacement Cost	100%	Special (Including theft)

Indication based on the following information:

528 N Brevard St, Charlotte, NC 28202
 8,700 Square Feet, Built in 1950
 Construction is brick
 Sprinklered

COMMERCIAL AUTO

CARRIER Philadelphia Indemnity Insurance Company
A.M. BEST RATING A++ XV
POLICY PERIOD TBD

ADDITIONAL ANNUAL PREMIUM: \$105 (Indication Estimate)

COVERAGE	SYMBOL(S)	LIMIT/DEDUCTIBLE
Liability	8, 9	\$1,000,000
Comprehensive/OTC	8	\$1,000 Deductible
Collision	8	\$1,000 Deductible

HIRED AND BORROWED AUTO	
Hired/Borrowed Liability	Yes
Non-Owned Auto Liability	Yes

COVERED AUTO SYMBOLS		
(1) ANY AUTO	(4) OWNED AUTOS OTHER THAN PRIVATE PASSENGER	(7) AUTOS SPECIFIED ON SCHEDULE
(2) ALL OWNED AUTOS	(5) ALL OWNED AUTOS WHICH REQUIRE NO-FAULT COVERAGE	(8) HIRED AUTOS
(3) OWNED PRIVATE PASSENGER AUTOS	(6) OWNED AUTOS SUBJECT TO COMPULSORY U.M. LAW	(9) NON-OWNED AUTOS



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WORKERS' COMPENSATION

CARRIER Oak River Insurance Company
A.M. BEST RATING A++ XV
POLICY PERIOD TBD

ADDITIONAL ANNUAL PREMIUM: \$3,148 (Indication Estimate)

PART I – WORKERS' COMPENSATION

Statutory Limits
 States Covered: AL, AZ, CA, HI, ID, IL, LA, TN, TX, NC

PART II – EMPLOYERS LIABILITY

COVERAGE	LIMIT
Each Accident	\$1,000,000
Disease – Policy Limits	\$1,000,000
Disease – Each Employee	\$1,000,000

PART III– OTHER STATES

Other States Covered: All States Except: ND, OH, WA, WY



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CRIME

CARRIER Philadelphia Indemnity Insurance Company
A.M. BEST RATING A++ XV
POLICY PERIOD TBD
ADDITIONAL ANNUAL PREMIUM: \$500 (Indication Estimate)

INSURING AGREEMENTS

COVERAGE	LIMIT
Employee Theft & Client Coverage	\$1,000,000
ERISA Fidelity	\$100,000
Forgery or Alteration	\$1,000,000
Computer Fraud and Funds Transfer Fraud	\$1,000,000

SCHEDULE OF ADDITIONAL COVERAGES AND LIMITS

Business Travel Accident Benefit	\$50,000
Conference Cancellation	\$25,000
Donation Assurance	\$50,000
Emergency Real Estate Consulting Fee	\$50,000
Fundraising Event Blackout	\$25,000
Identity Theft Expense	\$50,000
Image Restoration and Counseling	\$50,000
Key Individual Replacement Expenses	\$50,000
Kidnap Expense	\$50,000
Political Unrest	\$5,000 per employee \$25,000 policy limit
Temporary Meeting Space Reimbursement	\$25,000
Terrorism Travel Reimbursement	\$50,000
Travel Delay Reimbursement	\$1,500
Workplace Violence Counseling	\$50,000



ERRORS & OMISSIONS

CARRIER Philadelphia Indemnity Insurance Company
A.M. BEST RATING A++ XV
POLICY PERIOD TBD
ADDITIONAL ANNUAL PREMIUM: \$425 (Indication Estimate)

INSURING AGREEMENTS

COVERAGE	LIMIT
A. Professional Aggregate Limit	\$1,000,000
B. Defense Reimbursement	\$100,000
Defense Reimbursement Aggregate	\$300,000

DEDUCTIBLE	LIMIT
Coverage A	\$2,500
Coverage B	\$2,500

Retroactive Date:
 (Date the entity is added)

Note: In order to add Directors & Officers Coverage a newly completed application will be required.

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PREMIUM SUMMARY

COVERAGE	CARRIER	AM BEST RATING	ADMITTED	PROPOSED PREMIUM
General Liability	Philadelphia	A++ XV	Yes	\$4,260
Sexual or Physical Abuse	Philadelphia	A++ XV	Yes	\$982
Commercial Property	Philadelphia	A++ XV	Yes	\$1,906
Commercial Auto	Philadelphia	A++ XV	Yes	\$105
Workers Compensation	Oak River (BHHC)	A++ XV	Yes	\$3,148
Crime	Philadelphia	A++ XV	Yes	\$500
Errors & Omissions	Philadelphia	A++ XV	Yes	\$425
TOTAL ESTIMATED ANNUAL PREMIUM				\$11,326



Appendix M – Revenue Assurances and/or Working Capital Report

Pathways In Education – North Carolina

SECURED PROMISSORY NOTE

NOT TO EXCEED \$2,600,000.00

(July 1, 2020)
Pasadena, California

FOR VALUE RECEIVED, the undersigned, Pathways in Education – North Carolina, Inc., a North Carolina nonprofit public benefit corporation (“Borrower”), hereby promises to pay to Pathways Management Group, Inc., a California nonprofit public benefit corporation (“Lender”), at 320 N. Halstead Street, Suite 280, Pasadena, California, 91107, or at such other place as Lender may from time to time designate in writing, the principal sum of up to Two Million Six Hundred Thousand Dollars (\$2,600,000.00) (the “Commitment Amount”), or so much thereof as shall from time to time be advanced by Lender to Borrower pursuant to the terms of this Secured Promissory Note (the “Note”) with interest as determined herein, payable as set forth herein.

Term of Note. The term of this Note shall commence and be effective upon the date of the Borrower’s charter petition acceptance by the North Carolina Department of Education and shall continue until the Note is repaid in full, or until June 30, 2029 (the “Maturity Date”)

Advances. On or about the date of this Note, Lender shall make an initial advance to borrower in such amount as may be agreed to by Lender and Borrower. Thereafter, provided that the total Commitment Amount has not been advanced to Borrower, and provided that an Event of Default (as hereinafter defined) has not occurred and is continuing, Lender shall make subsequent advances as may be requested by Borrower from time to time, the aggregate total of which shall not exceed the Commitment Amount. As described above, the aggregate maximum amount that will be loaned by Lender to Borrower under the terms of this Note and the Agreement is the Commitment Amount, and, accordingly, Lender will advance funds to Borrower in an amount not to exceed the Commitment Amount. Notwithstanding the foregoing, nothing herein shall be construed as an obligation on the part of Lender to advance the Commitment Amount or any portion thereof (or any other amount) to Borrower and Lender shall have the right to elect, from time to time, in its sole discretion, not to advance any funds requested by Borrower. This Note is in the form of a non-revolving line of credit. Lender shall maintain an account on its books to evidence the amount from time to time outstanding under this Note. Lender shall by appropriate entries debit to such book account the amount of each advance hereunder, and any other amounts due Lender with respect to this Note and shall credit to such book account each payment of principal and interest on account of advances hereunder and other amounts payable hereunder. Each amount advanced to Borrower under this Note, including the initial advance, may be set forth on the Schedule of Advances attached hereto as Exhibit “A” and incorporated herein by this reference. All amounts so advanced shall be added to the principal balance of this Note; provided, however, that any failure to make any entries of advances on the attached Schedule of Advances shall not affect the rights or obligations of the parties hereunder. Absent manifest error, the records of Lender shall prevail in the event of a dispute.

Interest Rate. Interest shall accrue on the principal sum, or any other advances made by Lender, at a per annum interest rate of fifty percent (50%) of the lowest corresponding applicable

Long Term Federal Rate posted by the Internal Revenue Service (Applicable Interest Rate) in the month in which any Advance or disbursement was made.

Payment. The entire outstanding principal balance advanced to Borrower under this Note, together with any and all accrued but unpaid interest, shall be due and payable to Lender on the Maturity Date. Each payment made by Borrower shall be credited to the principal balance of the earliest advance made to Borrower then having an outstanding principal balance, and next to the principal balance of the next earliest advance made to Borrower then having an outstanding principal balance, and so forth until all outstanding principal is paid. Borrower shall pay to Lender as cash is available until the loan is paid in full, or until the Maturity Date, whichever occurs first.

- I. \$500,000.00 on June 30, 2025**
- II. \$500,000.00 on June 30, 2026**
- III. \$500,000.00 on June 30, 2027**
- IV. \$500,000.00 on June 30, 2028**
- V. Remaining Amount on June 30, 2029**

Prepayment. The unpaid principal amount hereof, or any portion thereof, may be prepaid at Borrower's option at any time prior to the Maturity Date without penalty or premium.

Pledge of ADA Apportionment. This Note, and the performance of Borrower's obligations hereunder, is secured by that certain Security Agreement (the "Agreement") to be entered into by Borrower concurrently herewith, whereby Borrower pledges, assigns and sets over to Lender Borrower's right, title and interest in ADA apportionment to be hereafter received by Borrower in connection with Borrower's operation as a charter school organization.

Representations of Borrower. Borrower warrants, represents and covenants to Lender that Borrower has full right, power and authority to enter into this Note and the Agreement and to consummate the transactions contemplated hereby and thereby. This Note and the Agreement have been duly and validly executed and delivered by Borrower and constitutes legal, valid and binding obligations of Borrower, enforceable against Borrower in accordance with their terms.

Event of Default. "Event of Default," whenever used herein, means any one or more of the following events of default shall have occurred and be continuing (whatever the reason for such event of default and whether it shall be voluntary or involuntary or be effected by operation of law pursuant to any judgment, decree or order of any court or any order, rule or regulation of any administrative or governmental body):

- (a) Any default in the payment of any amounts due under this Note or the Agreement;
- (b) Any default in the performance or breach of any other agreement, covenant, representation or warranty of Borrower as set forth in this Note or the Agreement;

- (c) The entry of a decree or order by a court having jurisdiction adjudging Borrower as bankrupt or insolvent, or approving as properly filed a petition seeking reorganization, arrangement, adjustment or composition of or in respect of Borrower under Federal Bankruptcy Law or any similar federal or state law for the relief of debtors (hereinafter Bankruptcy Law), or appointing a receiver, liquidator, assignee, trustee, conservator, sequestrator or assignee in bankruptcy or insolvency of Borrower or of any substantial part of its property, or ordering the winding up or liquidation of its affairs, and such decree or order shall have continued undischarged and unstayed for a period of sixty (60) days; or
- (d) Borrower shall commence a voluntary case or shall consent to the entry of an order for relief in any involuntary case under Bankruptcy Law, or shall consent to the appointment of or taking possession by a receiver, liquidator, custodian, sequestrator, trustee or assignee of any substantial part of its property, or shall make an assignment for the benefit of creditors, or shall fail generally to pay its debts as they become due.

Remedies on Default. If an Event of Default occurs and is continuing (unless waived in writing by the Lender), the Lender may exercise any one or more of the following remedies against Borrower without further notice or demand: (a) to receive interest on the principal balance from its due date until the date of payment at a default rate equal to the maximum rate permitted by law in lieu of the non-default interest rate specified in this Note; and/or (b) to exercise any remedy available at law or in equity to holders of notes which are in default.

Waiver of Presentment. Borrower hereby waives presentment, notice of dishonor, protest and diligence in bringing suit against Borrower. Acceptance by the Lender of any payment which is less than the full amount then due and owing hereunder shall not constitute a waiver of the Lender's right to receive payment in full at such time or at any prior or subsequent time. Borrower consents that the time of payment may be extended an unlimited number of times before or after the Maturity Date without notice to Borrower, and that Borrower shall not be discharged by reason of any such extension or extensions of time. No delay or omission on the part of the Lender in exercising any right hereunder shall operate as a waiver of such right or any other right under this Note. A waiver on any one occasion shall not be construed as a bar to or waiver of any such right or remedy on any future occasion. To the extent permitted by applicable law, the defense of the statute of limitations is hereby waived by Borrower. This Note may not be amended without the written consent of Lender.

Subordination. All of Borrower's obligations to Lender hereunder are expressly subordinated in right of payment to the prior payment in full of Borrower's indebtedness to any other party.

Expenses Incurred on Default. If an Event of Default occurs under this Note and this Note is placed in the hands of an attorney for collection or is collected through any courts including, without limitation, bankruptcy court, then Borrower shall be liable for any and all costs and expenses of collection to the fullest extent allowed by the applicable law of the State of California, including, without limitation, attorney's fees and legal costs.

Governing Law. This Note is made and delivered in the State of California and shall be governed by and construed in accordance with the laws of the State of California.

Binding Effect. This Note shall not be assigned by Borrower. Subject to the foregoing, this Note shall be binding upon Borrower, its successors and assigns, and shall inure to the benefit of Lender and its successors and assigns and all subsequent holders of this Note.

IN WITNESS WHEREOF, the parties hereto have duly executed this Note as of the date first above written.

BORROWER:

Pathways in Education – North Carolina, Inc.
A North Carolina nonprofit public benefit corporation

By: James H. Wilkes Jr.

Name: James H. Wilkes Jr.

Title: Member of Board of Director

LENDER:

Pathways Management Group, Inc.
A California nonprofit public benefit corporation

By: _____

Name: _____

Title: _____

SECURITY AGREEMENT

This SECURITY AGREEMENT (this “Agreement”) is made and entered into as of January 1, 2021, between Pathways in Education – North Carolina, Inc., a North Carolina nonprofit public benefit corporation (“Debtor”), and Pathways Management Group, Inc., a California nonprofit public benefit corporation (the “Secured Party”), with reference to the following facts:

A. Debtor operates education program which will enable disadvantaged youth to obtain a high quality and diverse education. However, Debtor is in need of working capital to start their education program and meet their respective anticipated obligations. In connection with such need, Secured Party has agreed to lend Debtor up to an aggregate of Two Million and Six Hundred Thousand Dollars (\$2,600,000.00) all in accordance with the terms of that certain Secured Promissory Note, dated as of the date hereof, made by Debtor in favor of Secured Party (the “Note”).

B. As a charter school, Debtor receives ADA apportionment in connection with Debtor’s operation as a charter school organization. In order to secure the prompt payment and performance of the Note by Debtor, Secured Party has requested that Debtor, and Debtor has agreed to, pledge, assign, set over and grant a security interest in Debtor's right, title and interest in ADA apportionment received by Debtor, in accordance with terms this Agreement.

NOW, THEREFORE, in order to induce Secured Party to lend funds to Debtor under the Note, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, Debtor hereby agrees as follows:

1. Definitions. As used in this Agreement:

“Collateral” means all right, title, and interest of Debtor in, to and under the following property, whether now owned or owing to, or hereafter acquired by or arising in favor of, Debtor (the following capitalized terms shall have the meaning assigned to such terms in the Commercial Code):

(a) All ADA apportionment, which Debtor is entitled to receive in connection with Debtor’s operation as an educational provider; and

(b) To the extent not otherwise included above, all proceeds and products of the foregoing and all accessions to, substitutes and replacements for, and revenues of each of the foregoing.

“Commercial Code” means the Uniform Commercial Code as may, from time to time, be enacted and in effect in the State of California.

“Lien” means any security interest, mortgage, pledge, lien, attachment, claim, charge, encumbrance, agreement retaining title, or lessor's interest covering the Collateral.

“Obligations” means all obligations of Debtor under that the Note, and attorneys’ fees and costs incurred by Secured Party in enforcing this Agreement or collecting payment under it.

2. UCC Definitions Incorporated by Reference. Terms defined in the Commercial Code not otherwise defined in this Agreement are used in this Agreement as defined in the Commercial Code on the date of this Agreement.

3. Grant of Security Interest. To secure the prompt and complete performance and observance of all of the Obligations, Debtor hereby grants and assigns to Secured Party a first priority Lien on all of its respective right, title, and interest in, to, and under the Collateral, whether now owned or owing to, or hereafter acquired by or arising in favor of it, and any and all proceeds and products of the foregoing and all accessions to, substitutions and replacements for, and profits of any and all of the Collateral.

4. Debtor’s Covenants. Debtor hereby covenants and agrees as follows:

(a) To pay the Obligations to Secured Party when they are due;

(b) To pay all expenses, including attorneys’ fees, incurred by Secured Party in the perfection, preservation, realization, enforcement, and exercise of Secured Party’s rights under this Agreement upon an Event of Default;

(c) To give Secured Party notice of any litigation, proceeding or claim that may have a material adverse effect on the Collateral;

(d) Not to sell, assign, lease, transfer, or otherwise dispose of the Collateral;

(e) Not to permit any Lien on the Collateral, except in favor of Secured Party;

(f) To execute and deliver to Secured Party all financing statements and other documents that Secured Party reasonably requests, in order to carry into effect the provisions of this Agreement and to perfect and maintain a perfected first-priority security interest in the Collateral; and

(g) To perform any and all acts reasonably requested by Secured Party necessary to maintain, preserve, and protect the Collateral.

In connection with the foregoing, promptly upon the request of Secured Party, Debtor shall execute irrevocable instructions in a form prepared by Secured Party directing Debtor’s respective client’s (and any other appropriate third party), and their successors and assigns, to pay or cause to be paid, to Secured Party, by wire transfer, the proceeds otherwise payable to Debtor from the Collateral. All amounts received by Secured Party pursuant to such instructions shall be applied against the amount owing to Secured Party by Debtor. Debtor

further agrees that: (i) Debtor shall execute such other and further documents as are reasonably required to carry out the intent of this Agreement; (ii) the grant of the security interest described in this Agreement is an absolute and unconditional grant, irrevocable by Debtor; and (iii) for purposes of avoiding doubt, the Collateral does not constitute the sole source of repayment of the Obligations, and Secured Party may proceed against Debtor (and any and all of its assets) to collect the amount owing to Secured Party without having to wait for the Management Fees to occur to first seek repayment of the Obligations.

5. Power of Attorney. Debtor hereby appoints the Secured Party as attorney in fact for it with the following powers:

(a) To prepare and file financing statements, continuation statements, statements of assignment, termination statements, amendments thereto and the like, as necessary to perfect, protect, preserve, or release Secured Party's interest in the Collateral;

(b) To endorse the name of Debtor for assignment to Secured Party on instruments, documents, or other forms of payment or security with respect to the Collateral; and

(c) To give notice to third parties of the right to payment of Secured Party with respect to the Collateral, including the State of California, and to enforce that right, and if necessary, to endorse the name of Debtor on such notice.

The foregoing power of attorney is irrevocable, coupled with an interest.

6. Termination of Agreement. This Agreement will terminate when all of the Obligations of Debtor owed to Secured Party have been satisfied in full in accordance.

7. Default. Debtor shall be in default under this Agreement upon the occurrence of any of the following events (each an "Event of Default"):

(a) Debtor commits any breach or fails to comply with the terms of the Note;

(b) There is a seizure or attachment of, or a levy on, any of the Collateral; or

(c) Debtor commits a breach of this Agreement.

8. Remedies. When an Event of Default occurs:

(a) Secured Party may exercise all rights and remedies available to a secured creditor after default, including, but not limited to, all of the rights and remedies of secured creditors under the Commercial Code; and

(b) Debtor shall (1) make the Collateral and all records relating to it available to Secured Party as Secured Party directs, and (2) allow Secured Party, its representatives, and its agents to enter the premises where all or any part of the Collateral, the records, or both may be, and remove any or all of it.

9. Payment of Enforcement Rights. Debtor shall pay all costs, fees and expenses (including, but not limited to, attorneys' fees) incurred by Secured Party in connection with taking of any action to enforce this Agreement, to perfect, protect or enforce the first priority Security Party in the Collateral, and/or to take possession of the Collateral upon an Event of Default.

10. Waiver by Secured Party. No waiver by Secured Party of any breach or default will be a waiver of any breach or default occurring later. A waiver will be valid only if it is in writing and signed by each Secured Party.

11. Assignment. This Agreement will bind and benefit the successors and assignees of the parties, but Debtor may not assign its respective rights or delegate its respective obligations under this Agreement.

12. Governing Law. This Agreement shall be governed by the law of California. Jurisdiction and venue of any dispute arising from this Note, including but not limited to performance by either party or the interpretation of its terms, shall be in Los Angeles Superior Court. The parties hereby waive any and all challenges to personal jurisdiction in said court.

13. Entire Agreement. This Agreement is the entire agreement between the parties and supersedes any prior agreement or understandings between the parties hereto relating to the Collateral.

14. Notices. Notices under this Agreement are considered to be served (a) three days after they are deposited in the United States mail, certified or registered with prepaid first-class postage, or (b) on receipt if served by facsimile or personal delivery. Debtor may change its address for service of notice, by notice to Secured Party in the manner set forth herein. All notices, requests and other communications hereunder to a party shall be in writing and shall be sent to the address set forth below:

14.1 If to Secured Party:
Pathways Management Group, Inc.
320 N. Halstead Street
Pasadena, CA 91107
ATTN: President

14.2 If to Debtor:
Pathways in Education – North Carolina, Inc.
Attn: Board President

15. Facsimile. Debtor agrees that facsimile signature of Debtor shall constitute due execution of this Agreement so executed and delivered by facsimile.

IN WITNESS WHEREOF, Debtor and Secured Party has executed this Agreement as of the day and year first written above.

Pathways in Education – North Carolina, Inc.,
A North Carolina nonprofit public benefit corporation

By: James H. Wilkes Jr.

Name: James H. Wilkes Jr.

Title: Member of Board of Director

Pathways Management Group, Inc.,
A California nonprofit public benefit corporation

By: _____

Name: _____

Title: _____

Appendix N – Proposed School Budget for Year 1 through Year 5 and Budget Narrative

Pathways In Education – North Carolina

1 Enrollment Projections Year 1 through Year 5

2 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.

3 The numbers in the following tables are projections, or estimates, and do not bind the State to fund the school at any particular level.

7	LEA #1:	600-Char.-Mecklenburg	What percentage of students from the LEA selected above will qualify for EC funding?	11%
8	LEA #2:		What percentage of students from the LEA selected above will qualify for EC funding?	
9	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
14	600			600			600			600			600		
15															
16	Kindergarten														
17	Grade 1														
18	Grade 2														
19	Grade 3														
20	Grade 4														
21	Grade 5														
22	Grade 6														
23	Grade 7														
24	Grade 8														
25	Grade 9	100		200			200			200			200		
26	Grade 10	100		200			200			200			200		
27	Grade 11	50		100			100			100			100		
28	Grade 12	50		100			100			100			100		
29	LEA Totals:	300	0	0	600	0	0	600	0	0	600	0	0	600	0

30 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).

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

12

13 **REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS**

14

LEA #1:		600-Char.-Mecklenburg		
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds	\$5,291.06	300	\$1,587,318.00	
Local Funds	\$2,756.00	300	\$826,800.00	
State EC Funds	\$4,464.16	33	\$147,317.28	
Federal EC Funds	\$1,514.35	33	\$49,973.55	
Total:			\$2,611,408.83	

22

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	

30

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	

38

1 **Total Budget: Revenue Projections Year 1 through Year 5**

2
 3 *All per pupil amounts are from the most current information and would be approximations for Year 1.*
 4
 5 *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.*
 6
 7 *These revenue projection figures do NOT guarantee the charter school would receive this amount of funding in Year 1.*
 8
 9 *For local funding amounts, applicants will need to contact their local offices or LEA.*
 10

11	Income:	Year 1	Year 2	Year 3	Year 4	Year 5
12	Revenue Projections					
12	State ADM Funds	\$ 1,587,318	\$ 3,174,636	\$ 3,174,636	\$ 3,174,636	\$ 3,174,636
13	Local Per Pupil Funds	\$ 826,800	\$ 1,653,600	\$ 1,653,600	\$ 1,653,600	\$ 1,653,600
14	State EC Funds	\$ 147,317	\$ 294,635	\$ 294,635	\$ 294,635	\$ 294,635
15	Federal EC Funds	\$ -	\$ 49,974	\$ 99,947	\$ 99,947	\$ 99,947
16	Other Funds*	\$ 2,600,000				
17	Working Capital*					
18	TOTAL REVENUE:	\$ 5,161,435	\$ 5,172,844	\$ 5,222,818	\$ 5,222,818	\$ 5,222,818

19 **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.*
 20
 21
 22 *Assurances are needed to confirm the commitment of these additional sources of revenue. Please include these as Appendix M.*
 23

Budget Expenditures Projection	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															
6 Lead Administrator	1	\$ 95,000	\$ 95,000	1	\$ 97,850	\$ 97,850	1	\$ 100,700	\$ 100,700	1	\$ 103,550	\$ 103,550	1	\$ 106,400	\$ 106,400
7 Assistant Administrator	0.1667	\$ 65,000	\$ 10,833	1	\$ 66,950	\$ 66,950	1	\$ 68,900	\$ 68,900	1	\$ 71,027	\$ 71,027	1	\$ 73,154	\$ 73,154
8 Finance Officer															
9 Clerical															
10 Food Service Staff															
11 Cafeteria															
12 Transportation Staff															
13 Cleaner/Driver	0.5	\$ 105,000	\$ 52,500	0.5	\$ 108,150	\$ 54,075	0.5	\$ 111,300	\$ 55,650	0.5	\$ 114,450	\$ 57,225	0.5	\$ 117,600	\$ 58,800
14 Center Coordinator	1.083	\$ 28,000	\$ 30,240	2	\$ 28,840	\$ 57,680	2	\$ 29,700	\$ 59,400	2	\$ 30,560	\$ 61,120	2	\$ 31,420	\$ 62,840
15 Enrollment and Outreach Specialist	1	\$ 45,700	\$ 45,700	1	\$ 47,135	\$ 47,135	1	\$ 48,570	\$ 48,570	1	\$ 50,005	\$ 50,005	1	\$ 51,440	\$ 51,440
16 Post-secondary & Student Services Counselor	0.333	\$ 50,000	\$ 16,667	1	\$ 51,500	\$ 51,500	2	\$ 53,000	\$ 106,000	2	\$ 54,500	\$ 109,000	2	\$ 56,000	\$ 112,000
17 Compliance Coordinator	0.333	\$ 35,500	\$ 11,833	1	\$ 36,925	\$ 36,925	2	\$ 38,350	\$ 76,700	2	\$ 39,775	\$ 79,550	2	\$ 41,200	\$ 82,400
18 Total Admin and Support	5.6667		\$ 314,390	9.167		\$ 482,380	9.5		\$ 514,515	9.5		\$ 529,951	9.5		\$ 545,840
Instructional Personnel															
21 Core Content Teacher(s)	2.16	\$ 48,000	\$ 104,160	10.9	\$ 49,440	\$ 538,896	12	\$ 50,920	\$ 611,078	12	\$ 52,450	\$ 629,411	12	\$ 54,020	\$ 648,263
22 Elective/Subject Teacher(s)															
23 Exceptional Children Teacher(s)	1.3	\$ 50,000	\$ 65,000	2.833	\$ 51,500	\$ 145,900	4	\$ 53,000	\$ 212,180	4	\$ 54,500	\$ 218,045	4	\$ 56,000	\$ 223,800
24 Instructional Support															
25 Teacher Assistants															
26 Small Group Instruction E.L.A.	0.833	\$ 48,000	\$ 39,864	1.833	\$ 49,440	\$ 91,620	2.833	\$ 50,920	\$ 144,864	3.833	\$ 52,450	\$ 200,904	4.833	\$ 54,020	\$ 261,048
27 Small Group Instruction Math	0.833	\$ 48,000	\$ 39,864	1.833	\$ 49,440	\$ 91,620	2.833	\$ 50,920	\$ 144,864	3.833	\$ 52,450	\$ 200,904	4.833	\$ 54,020	\$ 261,048
28 Small Group Instruction Science	0.833	\$ 48,000	\$ 39,864	1.833	\$ 49,440	\$ 91,620	2.833	\$ 50,920	\$ 144,864	3.833	\$ 52,450	\$ 200,904	4.833	\$ 54,020	\$ 261,048
29 Instructional Support	0.833		\$ 47,640	2		\$ 49,275	3		\$ 50,920	4		\$ 52,565	5		\$ 54,210
30 Total Instructional Personnel	10.9923		\$ 659,528	23.229		\$ 1,139,296	28		\$ 1,359,251	28		\$ 1,579,311	28		\$ 1,817,661
31 Total Admin, Support and Instructional Personnel	16.6590		\$ 973,918	33.396		\$ 1,621,676	37.5		\$ 1,873,766	37.5		\$ 1,909,262	37.5		\$ 1,963,501

** The personnel below may be re-assigned to another staffing of individual new schools. This includes aligning with proposed staff/total in the Operations Plan.

	A	B	C	D	E	F	G	H
1	Operations Budget: Expenditure Projections							
2								
3	<i>The following list of expenditure items is presented as an example. Applicants should modify to meet their needs.</i>							
4								
5	OPERATIONS BUDGET:							
6	Administrative and Support							
7		Year 1	Year 2	Year 3	Year 4	Year 5		
8	Office							
9	Office Supplies	\$ 60,000.00	\$ 30,000.00	\$ 40,000.00	\$ 40,000.00	\$ 40,000.00		
10	Paper	\$ 105,000.00	\$ 10,000.00	\$ 10,000.00	\$ 40,000.00	\$ 10,000.00		
11	Computers & Software	\$ 10,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00		
12	Communications & Telephone	\$ 5,300.00	\$ 10,600.00	\$ 10,600.00	\$ 10,600.00	\$ 10,600.00		
13	Other							
14	*** Insert rows and edit text as needed. ***							
15	Management Company							
16	Contract Fees	\$ 256,143.50	\$ 517,284.40	\$ 522,281.80	\$ 522,281.80	\$ 522,281.80		
17	Other							
18	*** Insert rows and edit text as needed. ***							
19	Professional Contract							
20	Legal Counsel	\$ 15,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00		
21	Student Accounting							
22	Financial							
23	Annual Audit	\$ 15,000.00	\$ 15,450.00	\$ 15,913.50	\$ 16,390.91	\$ 16,882.63		
24	*** Insert rows and edit text as needed. ***							
25	Facilities							
26	Facility Lease	\$ 120,000.00	\$ 162,400.00	\$ 167,272.00	\$ 172,290.16	\$ 177,458.86		
27	Maintenance	\$ 5,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00		
28	Custodial Supplies							
29	Custodial Contract	\$ 6,000.00	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00		
30	Insurance (General Liab. Pronev and	\$ 29,000.00	\$ 58,000.00	\$ 58,000.00	\$ 58,000.00	\$ 58,000.00		
31	School Furniture	\$ 80,000.00						
32	Leasehold Improvements	\$ 875,000.00						
33	Utilities							
34	Electric, Water, Gas	\$ 4,500.00	\$ 9,000.00	\$ 9,000.00	\$ 9,000.00	\$ 9,000.00		
35	Internet and Phone	\$ 15,000.00	\$ 30,000.00	\$ 30,000.00	\$ 30,000.00	\$ 30,000.00		
36	Trash	\$ 1,500.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00		
37	Other							
38	*** Insert rows and edit text as needed. ***							
39	Transportation							
40	Buses	\$ 5,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00		
41	Gas							
42	Oil/Tires & Maintenance							
43	Other							
44	*** Insert rows and edit text as needed. ***							
45	Other							
46	Marketing	\$ 35,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00		
47	Child nutrition	\$ 7,500.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00		
48	Travel	\$ 2,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00		
49	Staff Incentives	\$ 143,250.00	\$ 286,500.00	\$ 286,500.00	\$ 286,500.00	\$ 286,500.00		
50	*** Insert rows and edit text as needed. ***							
51	Total Administrative & Support	\$ 1,795,193.50	\$ 1,224,234.40	\$ 1,244,567.30	\$ 1,280,062.87	\$ 1,255,723.30		
52								
53	OPERATIONS BUDGET:							
54	Instructional							
55		Year 1	Year 2	Year 3	Year 4	Year 5		
56	Classroom Technology							
57	Software	\$ 10,000.00	\$ 14,000.00	\$ 14,000.00	\$ 14,000.00	\$ 14,000.00		
58	Instructional Technology	\$ 105,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00		
59	*** Insert rows and edit text as needed. ***							
60	Instructional Contract							
61	Staff Development	\$ 5,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00		
62	Exceptional Children Services	\$ 9,000.00	\$ 18,000.00	\$ 18,000.00	\$ 18,000.00	\$ 18,000.00		
63	Pathways Programs			\$ 125,000.00	\$ 125,000.00	\$ 125,000.00		
64	Books and Supplies							
65	Instructional Materials	\$ 130,000.00	\$ 140,000.00	\$ 140,000.00	\$ 140,000.00	\$ 140,000.00		
66	Curriculum/Texts							
67	Copy Paper							
68	Testing Supplies							
69	Other Education Services	\$ 100,000.00	\$ 150,000.00	\$ 150,000.00	\$ 150,000.00	\$ 150,000.00		
70	*** Insert rows and edit text as needed. ***							
71	Total Instructional Operations	\$ 359,000.00	\$ 337,000.00	\$ 462,000.00	\$ 462,000.00	\$ 462,000.00		
72								
73	TOTAL OPERATIONS	\$ 2,154,193.50	\$ 1,561,234.40	\$ 1,706,567.30	\$ 1,742,062.87	\$ 1,717,723.30		
74								
75	<i>* Applicants may amend this table and the position titles to fit their Education and Operations Plans.</i>							
76								
77								
78								
79								
80								
81								
82								
83								
84								
85								
86								

	A	B	C	D	E	F	G	H
1	Overall Budget							
2								
3	SUMMARY	Logic	Year 1	Year 2	Year 3	Year 4	Year 5	
4	Total Personnel	J	\$ 1,038,438.69	\$ 2,054,481.32	\$ 2,345,135.20	\$ 2,404,871.56	\$ 2,466,400.02	
5	Total Operations	M	\$ 2,154,193.50	\$ 1,561,234.40	\$ 1,706,567.30	\$ 1,742,062.87	\$ 1,717,723.30	
6	Total Expenditures	N = J + M	\$ 3,192,632.19	\$ 3,615,715.72	\$ 4,051,702.50	\$ 4,146,934.43	\$ 4,184,123.32	
7	Total Revenue	Z	\$ 5,161,435.28	\$ 5,172,844.11	\$ 5,222,817.66	\$ 5,222,817.66	\$ 5,222,817.66	
8	Surplus / (Deficit)	= Z - N	\$ 1,968,803.09	\$ 1,557,128.39	\$ 1,171,115.16	\$ 1,075,883.23	\$ 1,038,694.34	
9								



Pathways In Education – North Carolina Budget Narrative

Pathways In Education-North Carolina generates revenue from state and local per pupil aid to the school. The Charter School also receives a per pupil share of state and federal funds per student with disabilities. In addition, Pathways In Education-North Carolina anticipates receiving a one-time loan from Pathways Management Group at a per annum interest rate of 50% of the lowest corresponding applicable Long Term Federal Rate posted by the Internal Revenue Service in the month in which any advance or disbursement is made. This low interest loan is to fund start-up costs and operational expenses until distribution of State aid. Pathways In Education- North Carolina does not rely on donations, grants, or fundraising for revenue. Based on this information we estimate the following amounts for revenue for year one as:

Revenue year one: \$5,161,435

Expenses

Expenses were estimated based on anticipated staffing levels and related costs (i.e. payroll, health benefits, and retirement obligations), the monthly per pupil fee Pathways In Education- North Carolina will pay to Pathways Management Group for its management Services, and other facility, student activity, and ancillary costs. Loan repayment will begin in year two. The estimated expenses are based on Pathways In Education's long history of implementing similar successful educational models throughout Illinois, Louisiana, Tennessee, Arizona, and Idaho.

The budget detail provided with this application gives more insight into our budget assumptions and cost drivers. Below we highlight some of the key elements to our program and their corresponding budget.

Other Revenue: Loan for startup period from Pathways Management Group
\$2,600,000

Anticipated Start-up Costs

Administrative		
Principal	\$ 63,333.33	8 months prior to opening of \$95,000 annual salary 1 FTE
School Leader	\$ 52,500.00	1 Year prior to opening of \$105,0001 annual salary, half time
Administrative Staff	\$2,340.00	Admin Staff on site salary starts 1 month prior
Instructional Staff	\$ 53,620.00	Salary for 1 month prior to opening: ELA teacher, Math teacher, Science teacher, Social Science teacher, SPED teacher, Compliance Coordinator Salary for 5 months prior to opening: Pathways Career Coordinator
Payroll Taxes	\$ 13,743.47	Estimated 8% of total salaries (FICA: Social Security plus Medicare)
Benefits	\$ 32,640.73	Group Insurance Workers Comp 403B Contributions Paid Time Off
Recruiting/Marketing	\$ 40,000.00	Costs of promotional & marketing materials, public advertising, events prior to the school opening, recruitment fees included in management services
Total Administrative = \$ 258,177.80		
Supplies & Equipment		
Office Supplies	\$ 40,000	Start-up Office Supplies
Computers & Software (non-instructional)	\$ 100,000	Start-up Staff and Center Computers
Phone System	\$ 1,000	
Software (Instructional)	\$20,000	
Instructional Technology	\$100,000	
Curriculum/Texts	\$60,000	
Total Supplies & Equipment = \$321,000		
Facility		
Renovations & Repairs	\$ 875,000.00	\$125 sqft for 7,000 sqft Tenant Improvements

Rent/Lease	\$ 40,000.00		6 months prior to opening rent, CAM and Utilities included in the \$40,000
Fixtures & Furnishings	\$ 80,000.00		Estimate for 1 school site
Total Facility = \$ 995,000			
Contractual			
Legal	\$ 20,000.00		10 months prior to opening at \$2,000/month for legal fees
Total Contractual = \$ 20,000			
Total Expenditures = \$ 1,594,177.80			

Sustainability

Charter School Revenue Projections					
Revenue Source	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027
State ADM Funds	\$1,587,318	\$3,174,636	\$3,174,636	\$3,174,636	\$3,174,636
Local Per Pupil Funds	\$826,800	\$1,653,600	\$1,653,600	\$1,653,600	\$1,653,600
State EC Funds	\$147,317	\$294,635	\$294,635	\$294,635	\$294,635
Federal EC Funds	\$0	\$49,974	\$99,947	\$99,947	\$99,947
Other Funds	\$2,600,000				
Total	\$5,161,435	\$5,172,844	\$5,222,818	\$5,222,818	\$5,222,818

Appendix O-Other Forms and Evidence

- O.1 Recruitment and Marketing Plan
- O.2 Business Rules for Pathways In Education Reporting Metrics
- O.3 School Start-Up Plan (July 2022 Open Date)
- O.4 Support Staff Performance Review, Instructional and school leader Performance Review
- O.5 References
- O.6 Professional Development
- O.7 Application Fee
- O.8 Staffing Plan and School Org Chart
- O.9 Board of Directors Organizational Resolutions
- O.10 The Board of Directors Conflict of Interest Policy

Pathways In Education – North Carolina

Appendix O.1: Recruitment and Marketing Timeline

Pathways In Education – North Carolina



Pathways In Education – North Carolina Recruitment/ Marketing Timeline

Month	Action Description	Person Responsible	Collateral/Strategy
Fall 2021 (ongoing)	Visit/contact community leaders to inform them about PIE-NC' model and how they can play an integral part in its success	PIE-NC Board Members, School Leader, Principal, PMG	Fliers
January 2022	Create webpage and social media accounts	PMG Marketing	Page template/hosting
March 2022 (ongoing)	Visit/contact local service organizations and high schools to inform them about PIE-NC' model, and form referral networks for underserved students	School leader and Principal, PMG	Fliers
March – July 2022	Promote school online	PMG Marketing	Advertising and Social Media
March – July 2022	Secure visible advertising space in target neighborhoods, such as bus stops, billboards, and/or malls	PMG Marketing	Advertising and Social Media

<p>April-August 2022</p>	<p>Meet with administrators/counselors in CMS and charter secondary schools to detail the school model and collaborate around identification of students who would benefit from re-engagement efforts or a different school setting. During this window, PIE-NC will also launch participation in local job and career fairs.</p>	<p>School Leader, Principal, other school staff (if hired)</p>	<p>Brochures, fliers, and other printed collateral</p>
<p>May 2022</p>	<p>Host a community meeting at local rec center, library, or other neighborhood space to advertise PIE-NC to the public and answer questions about the program</p>	<p>School Leader, Principal, other school staff (if hired)</p>	<p>Brochures, fliers, and other printed collateral</p>
<p>June 2022</p>	<p>Host an open house at the new school site, invite local residents</p>	<p>School Leader, Principal and school staff</p>	<p>Invitation mailers, Brochures, fliers, and other printed collateral; Food/beverage</p>
<p>September 2022 – June 2023</p>	<p>Review performance/enrollment, secure additional online and physical advertising space as needed with remaining budget</p>	<p>School Leader, Principal, PMG Marketing</p>	<p>Advertising and Social Media</p>



PATHWAYS
IN EDUCATION

Pathways in Education North Carolina

Pathways In Education is a tuition-free accredited public high school dedicated to providing each student with a carefully tailored learning experience. At Pathways, every student is given the opportunity to succeed.



Sign Up to Learn More!

Sign up to get updates on the charter application for Pathways in Education - North Carolina.

Pathways in Education - North Carolina wants to serve students in grades 9-12 who are looking for a new school to call home. If you want a more flexible learning environment, Pathways can be the place for YOU!

Need a fresh start? Looking to graduate early? Want to catch up on credits?

Program Features



Guided Individual Learning

Students work and learn independently in a safe and constructive environment, at a pace tailored to each individual's ability and learning level as teachers give personalized attention and guidance.



Diverse Class Formats

Classes are available in several convenient formats— independent study, online, and small group instruction.



Flexibility

Students, parents, and teachers partner to create a learning plan schedule that respects and meets the needs of the student and their responsibilities outside of school.



Continuous Enrollment

The program operates year-round, allowing students to enroll any time.



Post-Secondary Counseling

Dedicated resources such as math tutors and student advisors are available to help each student focus on the development of a college or career plan.



Learning Support

In addition to free tutoring, small group instruction is offered in all levels of Math, English, and Science.



Experiential Learning

Pathways offers several experiential programs that seek to cultivate healthy life skills through hands-on activities.



Sports, Clubs, & Activities

Clubs and activities like baseball, student government, and prom ensure every student gets to take part in experiences that are both fun and important for social development.

Questions?
Call Nicholas Perez
at (773)230-0343
www.pathwaysedu.org



PATHWAYS
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Join Us to Learn More!

We're hosting an informational community meeting! Come by to learn more about our program, our plans for the future, and our dedication to our students.



When
Date TBD



Where
Address TBD



Free Food!
Light refreshments will be served.

Program Features



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Join Us to Learn More!

We're hosting an informational community meeting! Come by to learn more about our program, our plans for the future, and our dedication to our students.



When
Date TBD



Where
Address TBD



Free Food!
Light refreshments will be served.

Register at
***Not Required

Eventbrite®

Questions?
Call Nicholas Perez
at (773)230-0343
www.pathwaysedu.org

Appendix O.2: Business Rules for Pathways In Education Reporting Metrics

Pathways In Education-North Carolina

Business Rules for PIE Reporting Metrics

Below are some guiding questions that were used to develop PIE Metrics detailed in this document. Though these questions do not comprehensively measure the entire student experience, they generally represent a continuum of what happens from the time a student shows interest in the program to the time a student graduates and beyond.

1. Can we get students to enroll?
2. Can we get students to stay?
3. Can we get students to engage?
4. Can we get students to learn?
5. Can we get students to achieve a common goal (graduation)?
6. Are we equipping students for life after PIE?

Though no practical set of metrics can effectively measure every aspect of what our core values articulate, we have identified areas of focus for the 2017-18 school year.

Things to keep in mind:

- Length of school years (in school days) for PIE schools for 2017-18
 - IL: 218
 - LA: 205
 - TN: 205
 - AZ: 205
 - ID: 205
- Assuming a 24 credit (240 unit) graduation requirement:
 - 3 units per instructional period = 8 year graduation pace
 - 4 units per instructional period = 6 year graduation pace
 - 5 units per instructional period = 4 years 8 months graduation pace
 - 6 units per instructional period = 4 year graduation pace

Stabilization (Questions 2-3): The percentage of students who were enrolled at the end of the school year and subsequently returned to a PIE school by the end of Period 1 the following school year. This measures our ability to retain students across school years.

- Formula: $\frac{\text{Number of students in cohort enrolled as of the end of Period 1 the following year}}{\text{Cohort number of students enrolled as of the last day of the school year}}$
- Exclusions: Graduates or Completers
- Calculated once per year and expressed as a percentage

Average Student Retention (Question 2): Measures the percentage of students who are retained in the program. This does not seek to measure good vs. bad drops (as a defined dropout rate would) but rather is a measure of our ability to keep students at our

schools. Coupled with Credit Attainment, this metric provides a general measure of student engagement and connection with the staff.

- Formula: $\frac{\text{Total number of dropped students in the period}}{\text{Total number of students enrolled as of Day 1 of the instructional period}}$
- Exclusions:
 - Graduates or Completers
 - Secondary students, remanded students, or temporary enrollments
- Calculated for each period and expressed as a percentage
- Notes:
 - Based on a load of 50 students, a generally acceptable level of turnover is 2-4 students per period.
 - Schools in Year 1 of operation should be treated differently for this metric. Recommendation would be to either lower expectations or suspend incentives for semester 1.

12th Grade Graduation Rate (Question 5): A one-year cohort of graduates consisting of students who were in Grade 12 in StudentTrac by the end of Period 1 of the SY. Since students are not excluded if they drop from our school and graduate elsewhere, this also measures our ability to retain students in addition to graduating them in a timely fashion.

- Formula: $\frac{\text{Total number of graduates in 12th grade cohort}}{\text{Number of students in Grade 12 cohort by the end of Period 1}}$
- Note: This will be reported once per year with regular status updates from Accountability until an acceptable Tableau report is created for self-monitoring.

STAR Test Scores (Questions 4-5): This metric will be based on Reading and Math RenSTAR test scores. Research that PIE used in its Accountability proposals for other charters showed that students achieving “typical growth” had an SGP of between 35-65%.

- Formula: $\frac{\text{Number of students with an SGP of 45 or higher}}{\text{Total \# of students with qualifying Pre-and Post-Test scores}}$
- Expressed as a percentage
- **QUALIFYING PROVISION:** At least 95% of eligible students must be tested during designated testing windows to qualify for incentive regardless of outcome.
- Notes:
 - Both Math and Reading assessments will be reported separately
 - Since all STAR data is currently being uploaded into the internal data warehouse, Tableau will be used to track and report this metric.

Credit Attainment Rates (Questions 3 and 4): The total percentage of students meeting credit expectations. Generally, this metric seeks to track our ability to get students back on a 4-year graduation pace. This metric is based on the assumption that six graduation credits need to be earned per year for students to be on a 4-year graduation track.

- Formula: Number of students in each credit attainment category / Student count for Instructional Period
- Categories:
 - Not Meeting: 0-4 units attained during the period
 - Approaching: 4 units attained during the period
 - Meeting: 5 units attained during the period
 - Exceeding: 6 or more units attained during the period
- Exclusions:
 - Students not enrolled for the entire period including graduates
 - Students categorized as Lost Child (IL only)
- Notes:
 - The calendar has been reformatted with 10 equal instructional periods with between 20-22 days per period depending on the charter-defined number of school days in the SY.

Academic Recovery (Questions 3 and 4): The goal of this metric is to measure and subsequently minimize the number of students who are falling behind graduation pace. This will focus on students doing 0 or 1 unit of work during the period.

- Formula: Number of students earning 0 or 1 unit in a period / Student count for Instructional Period
- Exclusions:
 - Students not enrolled for the entire period including graduates
 - Students categorized as Lost Child or equivalent

Schoolwide Average Student Progress (Questions 3-4): Distinct from Credit Attainment in that it seeks to quantify an average student pace regardless of length of stay. This is based on the general rule that 6 credits (60 units) per year must be earned to be on a 4-year graduation pace. The goal of this metric is to measure year-over-year growth in average student pace. Further, this metric helps to tell PIE's story by comparing pace during students' time with PIE vs. students' time with schools they previously attended.

- Formula: $(\text{Total units earned by all students} \div 10) (\text{Total number of school days enrolled by all students}) * \text{Number of School Days}$
- The formula will be expressed as credits/year. Since the raw data will come in the form of number of units attained per day, the above formula converts this into credits/year.
- Exclusions:
 - Students with a total enrollment of less than 30 days
 - Identified short term students. Example: Secondary students in TN
- Notes:
 - This is a measure that is best applied to the entire school. This should not be analyzed on a teacher-level.
 - Comparison data to external schools will be dependent on completion "9th Grade Entry Date" field on the MPG for all students.

Appendix O.3: School Start-Up Plan (July 2022 Open Date)

Pathways In Education-North Carolina



Pathways In Education – North Carolina School Start-Up Plan (July 2022 Open Date)

Key Task	Activities	Responsible Parties	Completion
Board Meetings	<ul style="list-style-type: none"> Develop Schedule Develop and post agenda Conduct meetings Approve minutes Post minutes 	<ul style="list-style-type: none"> School Leader Principal Board Board 	<ul style="list-style-type: none"> 09/2021 Quarterly Quarterly Quarterly Quarterly
Budget	<ul style="list-style-type: none"> Board Approval Monitoring and revisions 	<ul style="list-style-type: none"> Board PMG 	<ul style="list-style-type: none"> First meeting Quarterly
Fiscal	<ul style="list-style-type: none"> Approval of fiscal policies Establish accounts 	<ul style="list-style-type: none"> Board, School Leader & PMG Board 	<ul style="list-style-type: none"> First meeting 06/2022
Facilities	<ul style="list-style-type: none"> Search Recommendation Selection Configuration and build-out Furnishing Maintenance 	<ul style="list-style-type: none"> School Leader PMG Board School Leader and PMG School Leader and PMG School Leader and PMG 	<ul style="list-style-type: none"> 11/2021 12/2021 01/2021 06/2021 06/2022 Ongoing
Curriculum	<ul style="list-style-type: none"> Create and finalize curriculum Purchase assessments and materials 	<ul style="list-style-type: none"> School Leader, Principal and PMG School Leader, Principal and PMG 	<ul style="list-style-type: none"> 12/2021 05/2022
Student Policies	<ul style="list-style-type: none"> Create and revise discipline, attendance, promotion, and grading policies Review and approval of policies (as necessary) 	<ul style="list-style-type: none"> School Leader, Principal and PMG Board 	<ul style="list-style-type: none"> 02/2022 Spring 2022 .

Leadership Selection (identifying key personnel)	<ul style="list-style-type: none"> Recruitment strategy implementation Selection recommendation Selection Orientation and training 	<ul style="list-style-type: none"> PMG School Leader and PMG Board PMG 	<ul style="list-style-type: none"> 09-12/2021 01/2022 01/2022 02/2022
Community Development	<ul style="list-style-type: none"> District schools Social services agencies Law enforcement Community-based organizations Parent meetings 	<ul style="list-style-type: none"> School Leader School Leader School Leader School Leader School Leader 	<ul style="list-style-type: none"> Ongoing Ongoing Ongoing Ongoing 01-06/2022
Hiring instructional staff	<ul style="list-style-type: none"> Recruitment strategy and implementation Selection recommendation Selection Orientation, professional development, and training 	<ul style="list-style-type: none"> PMG PMG School Leader PMG 	<ul style="list-style-type: none"> 01/2022-04/2022 04/2022 05/2022 06/2022
Student Enrollment	<ul style="list-style-type: none"> Recruitment Lottery Waitlist assignment Grade assignment Individualized Learning Plan 	<ul style="list-style-type: none"> School Leader PMG PMG PIE-NC PIE-NC 	<ul style="list-style-type: none"> 01/2022-03/2022 04/2022 04/2022-06/2022 Upon Enrollment Upon Enrollment

Appendix O.4: Support Staff Performance Review , Instructional Performance Review and School Leader Evaluation Form

Pathways In Education – North Carolina

Support Staff Performance Review

PURPOSE: To assess individual accomplishments; motivate by giving direction, recognition and encouragement; provide a review of performance and set goals for future performance.

SECTION 1 – EMPLOYEE INFORMATION

Name: Job Title:

Location: Date of Hire:

Review Date: Review Period:

PERFORMANCE RATINGS

Unacceptable <small>(Significantly below standards)</small>	Needs Improvement <small>(Does not meet standards)</small>	Effective <small>(Meets standards)</small>	Highly Effective <small>(Exceeds standards)</small>	Among the Best <small>(Significantly exceeds standards)</small>
0	1 - 4	5 - 8	9	10

SECTION 2 – PERFORMANCE FEEDBACK

1. JOB KNOWLEDGE:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best

Areas of Strength/Accomplishment:

Areas of Growth:

2. QUALITY OF WORK:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best

Areas of Strength/Accomplishment:

Areas of Growth:

3. QUANTITY OF WORK:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best

Areas of Strength/Accomplishment:

Areas of Growth:



4. PROFESSIONALISM:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best
--------------	-------------------	-----------	------------------	----------------

Areas of Strength/Accomplishment:

Areas of Growth:

5. ACHIEVING GOALS:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best
--------------	-------------------	-----------	------------------	----------------

Areas of Strength/Accomplishment:

Areas of Growth:

6. PERFORMANCE SUMMARY:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best
0	0	0	0	0

Areas of Strength/Accomplishment:

Areas of Growth:

**OVERALL
RATING**

0

SECTION 3 – AGREED EMPLOYEE GOALS

Write specific attainable goals/objectives for the employee to achieve during the next review period. Include quantitative and qualitative performance indicators, such as time, deadlines, budget goals/savings, knowledge, skills, abilities or changes to be implemented. Establish a priority (1, 2, 3, etc.) and weight (must total 100%) for each goal.

DESCRIBE GOALS/OBJECTIVES/RESULTS TO BE ACHIEVED	PRIORITY	WEIGHT
	1	50%
	2	25%
	3	15%
	4	10%

SECTION 4 – ACKNOWLEDGEMENTS

Employee Comments



Were you given an opportunity to complete the self-evaluation? Yes _____ No _____

Did you complete it? Yes _____ No _____

Enter any comments you wish to make about your performance discussion.

I have received a copy of this performance review and have had the opportunity to discuss it with my supervisor.

Employee Signature: _____ Date: _____

Conducted by: Name: _____ Title: _____

Signature: _____ Date: _____

HR's review prior to Appraisal Discussion: _____



CENTER COORDINATOR PERFORMANCE REVIEW
Weight Value Guideline

Automatic fill do not write on this page

		Rating Group #1						
		UN=0	NI=1-4	E=5-8	HE=9	AB=10		
Job Knowledge		0	0	0	0	0	TOTAL	0 x 2 = 0
Quality of Work		0	0	0	0	0		
Quantity of Work		0	0	0	0	0		
		Rating Group #2						
		UN=0	NI=1-4	E=5-8	HE=9	AB=10		
Professionalism		0	0	0	0	0	TOTAL	0 x 3 = 0
		Rating Group #3						
		UN=0	NI=1-4	E=5-8	HE=9	AB=10		
Achieving Goals		0	0	0	0	0	TOTAL	0 x 1.0 = 0
NEW OVERALL RATING		0	Needs Improvement		Effective	Highly Effective	Among the Best	Performance Summary Total
			NI ≤ 49		E = 50-87	HE=88-94	AB = 95-100	0

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

CENTER COORDINATOR REVIEW CONSIDERATIONS:

Listed below are a number of traits, abilities and characteristics (Performance Factors/Standards) that are important for an *effective* job performance. Carefully evaluate each factor separately. Remember, you are reviewing the employee’s performance for the entire review period. Provide staff with areas of strength and areas of growth in each of the 5 categories.

Then assign each section a rating based on the following rating scale:

Ranking	Description of Ranking	Rating
Unacceptable	Employee performance does not meet standards.	0
Needs Improvement	Employee performance is significantly below standards.	1-4
Effective	Employee performance meets standards.	5-8
Highly Effective	Employee performance meets, and exceeds standards.	9
Among the Best	Employee performance significantly exceeds all expectation.	10

1. JOB KNOWLEDGE

- A. Understands work procedures and equipment necessary to successfully perform assigned tasks and position responsibilities.
- B. Demonstrates understanding in the basic job assignments: data systems, online ordering software, managing budgets, collecting and requesting student records, EdPerformance and enrollment schedule management, safety procedures, curriculum/test drawer updates. Keeps abreast of new methods and technologies.
- C. Ability to effectively manage work load, plan and establish priorities, and efficiently utilize resources and assets, and follows jobs through to completion.

2. QUALITY OF WORK:

- A. Performs responsibilities effectively; demonstrates accuracy, neatness, completeness and timeliness in handling assigned tasks.
- B. Creativity: talent for having new ideas, being imaginative, and finding better ways of doing things. Creativity in day-to-day operations to improve efficiency and effectiveness. Also consider center décor and cleanliness.
- C. Problem Solving/Judgment: ability to identify and resolve real or potential problems in an effective and timely manner. Logically analyze alternative solutions or make recommendations while considering impact on co-workers and the school.
- D. Pro-active, positive willingness to flow with change and develop solutions. How well the employee adapts to new work situations, changes and responsibilities in policies and procedures. (Consider multi-task ability and flexibility.)

3. QUANTITY OF WORK

- A. Volume of quality work achieved as compared to the productivity standard. Consider extend to which center is stocked with curriculum, textbooks and supplies.
- B. Initiative: uses information, knowledge and job skills to accomplish tasks with minimal supervision; self-starter, uses time wisely.
- C. Enrollment Numbers: replenishing student loads quickly and keeps enrollment as full as possible.
- D. Consider additional roles assumed - test coordination, committee membership, student activities, newsletters.

4. PROFESSIONALISM:

- A. Dependability – Degree to which employee can be relied on to independently meet work commitments/deadlines with a minimum degree of supervision, and to follow through on tasks to completion. Consider attendance (including PTO accrual), tardiness, willingness to work overtime when necessary.
- B. Communication – ability to effectively speak, write & listen with all stakeholders with a spirit of cooperation & respect.
- C. Courtesy/Customer Service: degree to which politeness, assertiveness, and a positive attitude is shown to students, parents, district officials, visitors, outside vendors and co-workers.
- D. Teamwork on the center, regional and administrative level. Engagement in the center community
- E. Neatness, appropriateness of dress, appearance, demeanor, conduct, tact, maturity and the impression the individual makes on others, including the surrounding community.

5. ACHIEVING GOALS:

- A. Progress on previous years’ goals. Degree to which goals set during last evaluation period were achieved and improvement was shown in areas needing development.
- B. Establishing professional goals and pursuing opportunities to grow from previous year.

6. PERFORMANCE SUMMARY:

- A. Overall ability to achieve desired objectives and results.
- B. Summarize areas of strength.
- C. Summarize areas of growth.

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SUPPORT STAFF REVIEW CONSIDERATIONS

Listed below are a number of traits, abilities and characteristics (Performance Factors/Standards) that are important for an *effective* job performance. Carefully evaluate each factor separately. Remember, you are reviewing the employee's performance for the entire review period. Provide staff with areas of strength and areas of growth in each of the 5 categories.

Then assign each section a rating based on the following rating scale:

Ranking	Description of Ranking	Rating
Unacceptable	Employee performance does not meet standards.	0
Needs Improvement	Employee performance is significantly below standards.	1-4
Effective	Employee performance meets standards.	5-8
Highly Effective	Employee performance meets, and exceeds standards.	9
Among the Best	Employee performance significantly exceeds all expectation.	10

1. JOB KNOWLEDGE

- A. Understands work procedures and equipment necessary to successfully perform assigned tasks and position responsibilities.
- B. Demonstrates understanding in the basic job assignments (as applicable): data systems, online ordering software, managing budgets, collecting and requesting student/staff records, schedule management, safety procedures. Keeps abreast of new methods and technologies.
- C. Ability to effectively manage work load, plan and establish priorities, and efficiently utilize resources and assets, and follows jobs through to completion.

2. QUALITY OF WORK:

- A. Performs responsibilities effectively, demonstrates accuracy, neatness, completeness and timeliness in handling assigned tasks.
- B. Creativity: talent for having new ideas, being imaginative, and finding better ways of doing things. Creativity in day-to-day operations to improve efficiency and effectiveness.
- C. Problem Solving/Judgment: ability to identify and resolve real or potential problems in an effective and timely manner. Logically analyze alternative solutions or make recommendations while considering impact on co-workers and organization.
- D. Pro-active, positive willingness to flow with change and develop solutions. How well the employee adapts to new work situations, changes and responsibilities in policies and procedures. (Consider multi-task ability and flexibility.)

3. QUANTITY OF WORK

- A. Volume of quality work achieved as compared to the productivity standard.
- B. Initiative: uses information, knowledge and job skills to accomplish tasks with minimal supervision; self-starter, uses time wisely.
- C. Consider additional roles assumed/duties assigned.

4. PROFESSIONALISM:

- A. Dependability – Degree to which employee can be relied on to independently meet work commitments/deadlines with a minimum degree of supervision, and to follow through on tasks to completion. Consider attendance (including PTO accrual), tardiness, willingness to work overtime when/if necessary.
- B. Communication – ability to effectively speak, write & listen with all stakeholders with a spirit of cooperation & respect.
- C. Courtesy/Customer Service: degree to which politeness, assertiveness, and a positive attitude is shown to students, parents, district officials, visitors, clients, outside vendors and co-workers.
- D. Teamwork on the center/department, regional, administrative and/or organizational level.
- E. Neatness, appropriateness of dress, appearance, demeanor, conduct, tact, maturity and the impression the individual makes on others, including the surrounding community.

5. ACHIEVING GOALS:

- A. Progress on previous years' goals. Degree to which goals set during last evaluation period were achieved and improvement was shown in areas needing development.
- B. Establishing professional goals and pursuing opportunities to grow from previous year.

6. PERFORMANCE SUMMARY:

- A. Overall ability to achieve desired objectives and results.
- B. Summarize areas of strength.
- C. Summarize areas of growth.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

Instructional Performance Review

PURPOSE: To assess individual accomplishments; motivate by giving direction, recognition and encouragement; provide a review of performance and set goals for future performance.

SECTION 1 – EMPLOYEE INFORMATION

Name: Job Title:

Location: Date of Hire:

Review Date: Review Period:

PERFORMANCE RATINGS

Unacceptable <small>(Significantly below standards)</small>	Needs Improvement <small>(Does not meet standards)</small>	Effective <small>(Meets standards)</small>	Highly Effective <small>(Exceeds standards)</small>	Among the Best <small>(Significantly exceeds standards)</small>
0	1 - 4	5 - 8	9	10

SECTION 2 – PERFORMANCE FEEDBACK

1. JOB KNOWLEDGE:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best

Areas of Strength/Accomplishment:

Areas of Growth:

2. QUALITY OF INSTRUCTION AND/OR COMPLIANCE:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best

Areas of Strength/Accomplishment:

Areas of Growth:

3. STUDENT PROGRESS:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best

Areas of Strength/Accomplishment:

Areas of Growth:



4. PROFESSIONALISM:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best
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Areas of Strength/Accomplishment:

Areas of Growth:

5. ACHIEVING GOALS:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best
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Areas of Strength/Accomplishment:

Areas of Growth:

6. PERFORMANCE SUMMARY:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best
0	0	0	0	0

Areas of Strength/Accomplishment:

Areas of Growth:

OVERALL RATING 0

SECTION 3 – AGREED EMPLOYEE GOALS

Write specific attainable goals/objectives for the employee to achieve during the next review period. Include quantitative and qualitative performance indicators, such as time, deadlines, budget goals/savings, knowledge, skills, abilities or changes to be implemented. *Establish a priority (1, 2, 3, etc.) and weight (must total 100%) for each goal.*

DESCRIBE GOALS/OBJECTIVES/RESULTS TO BE ACHIEVED	PRIORITY	WEIGHT
	1	50%
	2	25%
	3	15%
	4	10%

SECTION 4 – ACKNOWLEDGEMENTS

Employee Comments



Were you given an opportunity to complete the self-evaluation? Yes _____ No _____

Did you complete it? Yes _____ No _____

Enter any comments you wish to make about your performance discussion. (attach sheets as necessary)

I have received a copy of this performance review and have had the opportunity to discuss it with my supervisor.

Employee Signature: _____ Date: _____

Conducted by: Name: _____ Title: _____

Signature: _____ Date: _____

HR's review prior to Appraisal Discussion: _____

TEACHER PERFORMANCE REVIEW
Weight Value Guideline

Automatic fill do not write on this page

		Rating Group #1				60%			
		UN=0	NI=1-4	E=5-8	HE=9	AB=10			
Job Knowledge		0	0	0	0	0	TOTAL	0 x 2 =	0
Quality of Instruction		0	0	0	0	0			
Student Progress (AKA Quantity)		0	0	0	0	0			
		Rating Group #2				30%			
		UN=0	NI=1-4	E=5-8	HE=9	AB=10			
Professionalism		0	0	0	0	0	TOTAL	0 x 3 =	0
		Rating Group #3				10%			
		UN=0	NI=1-4	E=5-8	HE=9	AB=10			
Achieving Goals		0	0	0	0	0	TOTAL	0 x 1.0 =	0
		NEW OVERALL RATING							
		0	Needs Improvement NI ≤ 49	Effective E = 50-87	Highly Effective HE=88-94	Among the Best AB = 95-100	TOTAL Performance		0

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

TEACHER REVIEW CONSIDERATIONS:

Listed below are a number of traits, abilities and characteristics (Performance Factors/Standards) that are important for an *effective* job

Then assign each section a rating based on the following rating scale:

Ranking	Description of Ranking	Rating
Unacceptable	Employee performance does not meet standards.	0
Needs Improvement	Employee performance is significantly below standards.	1-4
Effective	Employee performance meets standards.	5-8
Highly Effective	Employee performance meets, and exceeds standards.	9
Among the Best	Employee performance significantly exceeds all expectation.	10

1. JOB KNOWLEDGE

- A. Understands procedures for assigning student work (when to assign core classes, supplemental, etc).
- B. Demonstrates understanding in the basic job assignments: data systems, student records, appointment time management of approximately 5 students per hour, safety procedures.
- C. Ability to effectively manage work load, plan and establish priorities, and efficiently utilize resources and assets.

2. QUALITY OF INSTRUCTION AND/OR COMPLIANCE:

- A. File Compliance; Teacher maintains at least 86% on all audits.
- B. Maintains balance and interaction between students and administrative work.
- C. Course Offering, Average Course Difficulty
- D. Initiative/Creativity with students, parents, co-workers and instruction. Uses information, knowledge and job skills to accomplish assigned tasks without solicitation; self-starter; proactive; uses time wisely. Identifies needs, initiates solutions and has a talent for having new ideas, being imaginative and finding better ways of doing things.

3. STUDENT PROGRESS:

- A. ADA (minimum 40 ADA for full time Teacher: other positions as set by supervisor).
- B. Utilization (minimum 85%)
- C. Retention (Based on regional average). Follow up with Parents/Students regarding attendance issues.
- D. Enrollment Numbers (replenishing student loads).
- E. Maximizing effectiveness of class by utilizing additional school resources such as SGI, Tutors, etc...
- F. CAHSEE Pass Rates:
 - a. English: 2% Increase from Previous Year **OR** 3% Increase from previous year or 85% Pass Rate.
 - b. Math: 2% Increase from Previous Year **OR** 3% Increase from previous year or 75% Pass Rate.

4. PROFESSIONALISM:

- A. Dependability – Degree to which employee can be relied on to independently meet work commitments/deadlines with a minimum degree of supervision. And to follow through on tasks to completions.
- B. Communication – ability to effectively speak, write & listen with all stakeholders with a spirit of cooperation & respect.
- C. Problem solving – Ability to identify and resolve real or potential problems in an effective and timely manner and logically analyze alternative solutions or make recommendations, considering impact on co-workers, students, parents, districts and Company.
- D. Pro-active, positive willingness to flow with change and develop solutions. How well the employee adapts to new work situations, changes and responsibilities in policies and procedures. (Consider multi-task ability and flexibility.)
- E. Teamwork on the center, charter, and administrative level.
- F. Neatness, appropriateness of dress, appearance, demeanor, conduct, tact, maturity and the impression the individual makes on others, including the surrounding community.

5. ACHIEVING GOALS:

- A. Progress on previous years' goals. Degree to which goals set during last evaluation period were achieved and improvement was shown in areas needing development.
- B. Establishing professional goals and pursuing opportunities to grow from previous year.

6. PERFORMANCE SUMMARY:

- A. Overall ability to achieve desired objectives and results.
- B. Summarize areas of strength.
- C. Summarize areas of growth.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

SGI REVIEW CONSIDERATIONS:

Listed below are a number of traits, abilities and characteristics (Performance Factors/Standards) that are important for an *effective* job performance. Carefully evaluate each factor separately. Remember, you are reviewing the employee’s performance for the entire review period. Provide staff with areas of strength and areas of growth in each of the 5 categories.

Then assign each section a rating based on the following rating scale:

Ranking	Description of Ranking	Rating
Unacceptable	Employee performance does not meet standards.	0
Needs Improvement	Employee performance is significantly below standards.	1 - 4
Effective	Employee performance meets standards.	5 - 8
Highly Effective	Employee performance meets, and exceeds standards.	9
Among the Best	Employee performance significantly exceeds all expectation.	10

1. JOB KNOWLEDGE

- A. Understands procedures for assigning student work (when to assign core classes, supplemental, etc).
- B. Demonstrates understanding in the basic job assignments: data systems, student records, safety procedures
- C. Ability to effectively manage work load, plan and establish priorities, and efficiently utilize resources and assets.
- D. Student Tracking.

2. QUALITY OF INSTRUCTION AND/OR COMPLIANCE:

- A. Rapport with Students and Parents.
- B. Maintains balance and interaction between students and administrative work.
- C. Course Offering
- D. Initiative/Creativity with students, parents, co-workers and instruction. Uses information, knowledge and job skills to accomplish assigned tasks without solicitation; self-starter; proactive; uses time wisely. Identifies needs, initiates solutions and has a talent for having new ideas, being imaginative and finding better ways of doing things.

3. STUDENT PROGRESS:

- A. CAHSEE Pass Rate
- B. API
- C. Retention (Drops in General) Attendance IN classes
- D. Enrollment Numbers/Recruitment
- E. Maximizing effectiveness of Class.

4. PROFESSIONALISM:

- A. Dependability – Degree to which employee can be relied on to independently meet work commitments/deadlines with a minimum degree of supervision. And to follow through on tasks to completions.
- B. Communication – ability to effectively speak, write and listen with all stakeholders with a spirit of cooperation and respect.
- C. Problem solving – Ability to identify and resolve real or potential problems in an effective and timely manner and logically analyze alternative solutions or make recommendations, considering impact on co-workers, students, parents, districts and Company.
- D. Pro-active, positive willingness to flow with change and develop solutions. How well the employee adapts to new work situations, changes and responsibilities in policies and procedures. (Consider multi-task ability and flexibility.)
- E. Teamwork on the center, charter, and administrative level.
- F. Neatness, appropriateness of dress, appearance, demeanor, conduct, tact, maturity and the impression the individual makes on others, including the surrounding community.

5. ACHIEVING GOALS:

- A. Progress on previous years’ goals. Degree to which goals set during last evaluation period were achieved and improvement was shown in areas needing development.
- B. Establishing professional goals and pursuing opportunities to grow from previous year.

6. PERFORMANCE SUMMARY:

- A. Overall ability to achieve desired objectives and results.
- B. Summarize areas of strength.
- C. Summarize areas of growth.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

STUDENT ADVISOR REVIEW CONSIDERATIONS:

Listed below are a number of traits, abilities and characteristics (Performance Factors/Standards) that are important for an *effective* job performance. Carefully evaluate each factor separately. Remember, you are reviewing the employee’s performance for the entire review period. Provide staff with areas of strength and areas of growth in each of the 5 categories.

Then assign each section a rating based on the following rating scale:

Ranking	Description of Ranking	Rating
Unacceptable	Employee performance does not meet standards.	0
Needs Improvement	Employee performance is significantly below standards.	1 - 4
Effective	Employee performance meets standards.	5 - 8
Highly Effective	Employee performance meets, and exceeds standards.	9
Among the Best	Employee performance significantly exceeds all expectation.	10

1. JOB KNOWLEDGE

- A. Understands post-secondary options for students, including 2-year, 4-year, vocational, etc.
- B. Demonstrates understanding in the basic job assignments: data systems, student records, creating and presenting workshops.
- C. Ability to effectively manage work load, plan and establish priorities, and efficiently utilize resources and assets.
- D. Student Tracking.

2. QUALITY OF INSTRUCTION AND/OR COMPLIANCE:

- A. Rapport with Students and Parents.
- B. Maintains balance and interaction between students and administrative work.
- C. Workshop and/or Post-Secondary course offerings.
- D. Initiative/Creativity with students, parents, co-workers and instruction. Uses information, knowledge and job skills to accomplish assigned tasks without solicitation; self-starter; proactive; uses time wisely. Identifies needs, initiates solutions and has a talent for having new ideas, being imaginative and finding better ways of doing things.

3. STUDENT PROGRESS:

- A. Graduate rate increase
- B. Senior Benchmark
- C. College Entrance
- D. 12-Month College Completion Rate
- E. Cal Grants and FAFSA

4. PROFESSIONALISM:

- A. Dependability – Degree to which employee can be relied on to independently meet work commitments/deadlines with a minimum degree of supervision. And to follow through on tasks to completions.
- B. Communication – ability to effectively speak, write and listen with all stakeholders with a spirit of cooperation and respect.
- C. Problem solving – Ability to identify and resolve real or potential problems in an effective and timely manner and logically analyze alternative solutions or make recommendations, considering impact on co-workers, students, parents, districts and Company.
- D. Pro-active, positive willingness to flow with change and develop solutions. How well the employee adapts to new work situations, changes and responsibilities in policies and procedures. (Consider multi-task ability and flexibility.)
- E. Teamwork on the center, charter, and administrative level.
- F. Neatness, appropriateness of dress, appearance, demeanor, conduct, tact, maturity and the impression the individual makes on others, including the surrounding community.

5. ACHIEVING GOALS:

- A. Progress on previous years’ goals. Degree to which goals set during last evaluation period were achieved and improvement was shown in areas needing development.
- B. Establishing professional goals and pursuing opportunities to grow from previous year.

6. PERFORMANCE SUMMARY:

- A. Overall ability to achieve desired objectives and results.
- B. Summarize areas of strength.
- C. Summarize areas of growth.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

RESOURCE SPECIALIST TEACHER REVIEW CONSIDERATIONS:

Listed below are a number of traits, abilities and characteristics (Performance Factors/Standards) that are important for an *effective* job performance. Carefully evaluate each factor separately. Remember, you are reviewing the employee’s performance for the entire review period. Provide staff with areas of strength and areas of growth in each of the 5 categories.

Then assign each section a rating based on the following rating scale:

Ranking	Description of Ranking	Rating
Unacceptable	Employee performance does not meet standards.	0
Needs Improvement	Employee performance is significantly below standards.	1 - 4
Effective	Employee performance meets standards.	5 - 8
Highly Effective	Employee performance meets, and exceeds standards.	9
Among the Best	Employee performance significantly exceeds all expectation.	10

1. JOB KNOWLEDGE

- A. Understands and adheres to OFY policies and procedures related to IEP student enrollment and continued educational benefit in the independent study environment.
- B. Understands and adheres to Federal and State mandates related to special education.
- C. Demonstrates a good understanding of the resource specialty program in the independent study environment.
- D. Ability to effectively manage caseload (scheduling, IEP specified services and support, timelines, mandated paperwork).
- E. Understands IEP software (SEIS, WEBIEP) and OFY student data base.

2. QUALITY OF INSTRUCTION AND/OR COMPLIANCE:

- A. File management (maintains organized special education files at the center in a locked cabinet, submits paperwork to the Special Ed Department for the master file in a timely manner).
- B. Works collaboratively with Teacher of record on course offerings given the students IEP.
- C. Adheres to all IEP Timelines (100% Compliance): 30-Day, Annual, Triennial, Initial, Graduation/Transition, Progress Review. Additionally Updates IEP for enrolling students whose IEP’s are overdue.
- D. Completes all appropriate areas of the IEP and ITP. Scripts IEP appropriately with appropriate signatures.
- E. Chairs IEP meetings in a communicative and meaningful fashion and lists the involvement of the parent(s) in its development.
- F. Fosters positive rapport and constructive relationships among all IEP team members.
- G. Constructs and implements IEP’s to maximize student success in the independent study environment (services, accommodations, goals, supports). If independent study is not adequate, assisting students and parents in determining appropriate educational setting to assure education benefit and successful outcomes.
- H. Completes appropriate assessments within the mandated timelines.
- I. Maintains electronic databases (SEIS, WEBIEP).
- J. Completes and submits all necessary paperwork to the Special Ed Department in a timely manner (IEP pages, SRS forms, Progress Toward Goal Sheets).

3. STUDENT PROGRESS:

- B. Student Focused: Establishes positive rapport with students and all involved in students’ education program; motivates students to achieve; supports student attendance.
- C. Supports appropriately placed students effectively helping them to acquire the knowledge, skills and strategies for successful outcomes (minimum 85% utilization, CAHSEE passage, increased proficiency on standardized state exams).
- D. Collaborates with general education staff and others (parents, outside agencies) to optimize student outcomes (utilization, CAHSEE, standardized state exams) and resources (SGI, supplemental resources, tutors, Student Advisors).
- E. Contributes expertise applicable to the success of all students (i.e. Does at least one of the following: presents at meeting/workshop, facilitates small group instruction, provides resources to individual teachers or at charter meetings); communicates regularly with staff and general education teachers.
- F. Demonstrating student progress toward IEP goals, and achievement/support of organization goals (increased utilization, CAHSEE passage rates, standardized state exams)

4. PROFESSIONALISM:

- A. Dependability – Degree to which employee can be relied on to independently meet work commitments/deadlines with a minimum degree of supervision. And to follow through on tasks to completions.
- B. Communication – ability to effectively speak, write and listen with all stakeholders with a spirit of cooperation and respect.

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.



- C. Problem solving – Ability to identify and resolve real or potential problems in an effective and timely manner and logically analyze alternative solutions or make recommendations, considering impact on co-workers, students, parents, districts and Company.
- D. Pro-active, positive willingness to flow with change and develop solutions. How well the employee adapts to new work situations, changes and responsibilities in policies and procedures. (Consider multi-task ability and flexibility.)
- E. Teamwork on the center, charter, and administrative level.
- F. Neatness, appropriateness of dress, appearance, demeanor, conduct, tact, maturity and the impression the individual makes on others, including the surrounding community.

5. ACHIEVING GOALS:

- A. Progress on previous years' goals. Degree to which goals set during last evaluation period were achieved and improvement was shown in areas needing development.
- B. Establishing professional goals and pursuing opportunities to grow from previous year.

6. PERFORMANCE SUMMARY:

- A. Overall ability to achieve desired objectives and results.
- B. Summarize areas of strength.
- C. Summarize areas of growth.

Supervisory Self-EvaluationEmployee Name: Job Title: Location: Hire Date: Supervisor:

These questions can help you prepare for your review to discuss your performance, progress and plans for future growth. Each of the questions below corresponds to the applicable Considerations sheet for your position. Using the Considerations sheet as a guideline please respond to each section below with your areas of strength/accomplishment, and how you can grow further. Please note that the considerations sheets are not always tailored specifically to a unique position but rather a group of positions that share common characteristics. Because of this you may see considerations listed that are not applicable to your specific title. In cases such as these please address each area as best you can.

If you do not already have a copy of your positions considerations sheet, please contact your leadership team or a member of the HR department.

Once drafted, please give a copy to your supervisor.

1. Leadership:**Areas of Strength/Accomplishments:****Areas of Growth:****2. Quality of Work/Results:****Areas of Strength/Accomplishments:****Areas of Growth:**

3. **Employee Relations:**

Areas of Strength/Accomplishments:

Areas of Growth:

4. **Professionalism:**

Areas of Strength/Accomplishments:

Areas of Growth:

5. **Achieving Goals: Progress on last year's goals (if applicable):**

What new goals and standards should be established for the next review period? Which old ones need to be modified?

6. **How could my supervisor help me do a better job?**

7. **What resources, experience or training do I need to improve myself and do my job better?**

8. What are my long-term goals for me and my team?

9. What other topics would I like to discuss in my upcoming review?

Employee Signature

Date

Supervisory Performance Review

PURPOSE: To assess individual accomplishments; motivate by giving direction, recognition and encouragement; provide a review of performance and set goals for future performance.

SECTION 1 – EMPLOYEE INFORMATION

Name:		Job Title:	
Location:		Date of Hire:	
Review Date:		Review Period:	

PERFORMANCE RATINGS

Unacceptable <small>(Significantly below standards)</small>	Needs Improvement <small>(Does not meet standards)</small>	Effective <small>(Meets standards)</small>	Highly Effective <small>(Exceeds standards)</small>	Among the Best <small>(Significantly exceeds standards)</small>
0	1 - 4	5 - 8	9	10

SECTION 2 – PERFORMANCE FEEDBACK

1. LEADERSHIP:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best

Areas of Strength/Accomplishment:

Areas of Growth:

2. QUALITY OF WORK/RESULTS:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best

Areas of Strength/Accomplishment:

Areas of Growth:

3. EMPLOYEE RELATIONS:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best

Areas of Strength/Accomplishment:

Areas of Growth:

4. PROFESSIONALISM:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best
0	0	0	0	0

Areas of Strength/Accomplishment:

Areas of Growth:

5. ACHIEVING GOALS:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best
0	0	0	0	0

Areas of Strength/Accomplishment:

Areas of Growth:

6. PERFORMANCE SUMMARY:

Unacceptable	Needs Improvement	Effective	Highly Effective	Among the Best
0	0	0	0	0

Areas of Strength/Accomplishment:

Areas of Growth:

**OVERALL
RATING**

0

SECTION 3 – AGREED EMPLOYEE GOALS

Write specific attainable goals/objectives for the employee to achieve during the next review period. Include quantitative and qualitative performance indicators, such as time, deadlines, budget goals/savings, knowledge, skills, abilities or changes to be implemented.

Establish a priority (1, 2, 3, etc.) and weight (must total 100%) for each goal.

DESCRIBE GOALS/OBJECTIVES/RESULTS TO BE ACHIEVED	PRIORITY	WEIGHT
	1	50%
	2	25%
	3	15%
	4	10%

SECTION 4 – ACKNOWLEDGEMENTS

Employee Comments

Were you given an opportunity to complete the self-evaluation? Yes _____ No _____

Did you complete it? Yes _____ No _____

Enter any comments you wish to make about your performance discussion.

I have received a copy of this performance review and have had the opportunity to discuss it with my supervisor.

Employee Signature: _____ Date: _____

Conducted by: Name: _____ Title: _____

Signature: _____ Date: _____

HR's review prior to Appraisal Discussion: _____

SUPERVISORY PERFORMANCE REVIEW
Weight Value Guideline

Automatic fill do not write on this page

		Rating Group #1									
		60%									
		UN=0	NI=1-4	E=5-8	HE=9	AB=10					
Leadership		0	0	0	0	0	TOTAL	0	x 2 =	0	
Employee Relations		0	0	0	0	0					
Professionalism		0	0	0	0	0					
		Rating Group #2									
		30%									
		UN=0	NI=1-4	E=5-8	HE=9	AB=10					
Quality of Work/Results		0	0	0	0	0	TOTAL	0	x 3 =	0	
		Rating Group #3									
		10%									
		UN=0	NI=1-4	E=5-8	HE=9	AB=10					
Achieving Goals		0	0	0	0	0	TOTAL	0	x 1.0 =	0	
								Performance Summary			
NEW OVERALL RATING		0	Needs Improvement NI ≤ 49	Effective E = 50-87	Highly Effective HE=88-94	Among the Best AB = 95-100	Total		0		

SUPERVISORY REVIEW CONSIDERATIONS:

Listed below are a number of traits, abilities and characteristics (Performance Factors/Standards) that are important for an *effective* job performance. Carefully evaluate each factor separately. Remember, you are reviewing the employee's performance for the entire review period. Provide staff with areas of strength and areas of growth in each of the 5 categories.

Then assign each section a rating based on the following rating scale:

Ranking	Description of Ranking	Rating
Unacceptable	Employee performance does not meet standards.	0
Needs Improvement	Employee performance is significantly below standards.	1-4
Effective	Employee performance meets standards.	5-8
Highly Effective	Employee performance meets, and exceeds standards.	9
Among the Best	Employee performance significantly exceeds all expectation.	10

1. LEADERSHIP

- A. Ability to develop an environment that fosters confidence and respect, and supplies direction to others. Ability to provide opportunity for open communication at all levels.
- B. Coach/Motivate Employees: degree to which supervisor provides help to others; gives candid and regular feedback on performance; gives employees support to succeed and provides opportunities for employees to realize their full potential; takes responsibility for developing and improving the contribution of each employee.
- C. Encourage Teamwork: ability to establish common objectives with joint accountability among team members; develop two-way communication and a feeling of group identity; encourage conflict resolution; maintain and promote positive morale and productivity. Achieve buy-in when promoting a shared vision and/or new programs/initiatives.
- D. Effective Delegation: delegates company's objectives by giving employees appropriate authority and responsibility to act.
- E. Problem Solving/Judgment: identify real/potential problems or likely consequences of actions/events. Ability to logically analyze alternative solutions, taking risks into account; defend the alternatives selected and act upon it.
- F. Completes areas performance reviews on time.

2. QUALITY OF WORK/RESULTS:

- A. Achieving goals related to ADA projections, Utilization, Audit Scores, Graduation rates.
- B. Achieving goals related to CAHSEE passage rates, API scores, and proficiency levels.
- C. Planning/Organization: ability to set priorities, organize projects, create workable schedules and delineate short-term and long-term goals. Ability to plan for the future; evaluating project resource needs, formulate and evaluate new ideas.
- D. Job Knowledge: demonstrates understanding of job and work procedures necessary to successfully perform assigned tasks and position responsibilities. Keeps abreast of new methods and technologies.
- E. Staffing: ability to conduct a thorough selection process, select well-suited applicants, and train them effectively.
- F. Works with corporate and support departments effectively and meets external timelines (ie:timesheets, perf reviews, projections, exp. reports, etc...)

3. EMPLOYEE RELATIONS:

- A. Addresses Performance: ability to give effective and timely performance appraisals; give credit/recognition for success in monetary and non-monetary forms. Ability to correct substandard performance when it happens.
- B. Supports Reasonable Risk-Taking: create an environment where employees are willing to take actions where outcomes are less certain, but where potential rewards are greater; give credit when efforts succeed, give support/feedback when not achieved.
- C. Interpersonal Relations: interactions with others, responses to suggestions/criticism; maintaining a spirit of cooperation and respect.
- D. Manage Diversity: understands the work force is made up of people with great diversity of values, opinions, backgrounds and goals. Finds individual motivation of each employee and taps into it. Maintains high standards regardless of the people who are managed.

4. PROFESSIONALISM:

- A. Dependability – Degree to which employee can be relied on to independently meet work commitments/deadlines with a minimum degree of supervision. And to follow through on tasks to completions.
- B. Communication – ability to effectively speak, write & listen with all stakeholders with a spirit of cooperation & respect. Provides timely and concise information to employees; ability to understand and convey key issues; anticipates informational needs.
- C. Sets the professional example for neatness, appropriateness of dress, appearance, demeanor, conduct, tact, and maturity. Realizes that his/her actions reflect on the company in all aspects of business; consider impression the individual makes on others, both inside and outside the company.
- D. Safety: understands, supports and enforces company safety policy and complies with OSHA regulations.
- E. Holds and maintains appropriate credentials/qualifications for the position.

5. ACHIEVING GOALS:

- A. Progress on previous years' goals. Degree to which goals set during last evaluation period were achieved and improvement was shown in areas needing development.
- B. Establishing professional goals and pursuing opportunities to grow from previous year.

6. PERFORMANCE SUMMARY:

- A. Overall ability to achieve desired objectives and results.
- B. Summarize areas of strength.
- C. Summarize areas of growth.



Pathways In Education – North Carolina School Leader Evaluation Form

PART A: EVALUATION FORM FOR SCHOOL LEADER

Name: _____

Evaluation Year: _____

School Assignment/Position: _____

Total Years of Administrative/Teaching Experience: _____

Evaluation of the effectiveness of being an administrator is basic to improved instruction and professional growth. The criteria listed in each category of performance will assist both administrators and evaluators in the evaluation process and in order to draw conclusions regarding the overall effectiveness of administrators. Administrators will be rated as highly effective, effective, improvement necessary, or ineffective based on the evaluation criteria and student growth data.

Evaluators Will Use the Following Rubrics to Score Each Question:

Highly Effective - Performance consistently exhibits multiple strengths that have a strong, positive impact on students and the school climate. Counselor serves as a model. Areas for professional growth are self-directed. Score = 3

Effective - Performance typically exhibits multiple strengths that favorably impact students and the school climate. Counselor serves as a model in some areas. Areas for professional growth are generally self-directed. Score = 2

Improvement Necessary - Performance typically exhibits strengths that impact favorably on students and school climate. Areas of professional growth can be identified. Score = 1

Ineffective - Performance frequently exhibits weaknesses that negatively impact students and the school climate. Areas for professional growth will be identified, and an improvement plan will be developed. Direct and immediate intervention is required by administrator. Score = 0

Administrator Effectiveness: Administrators know that teacher quality is the most important in-school factor relating to student achievement. Administrators drive effectiveness through (1) their role as a human capital manager and (2) by providing instructional leadership. Ultimately, administrators are evaluated by their ability to drive teacher development and improvement based on a system that credibly differentiates the performance of teachers based on rigorous, fair definitions of teacher effectiveness. Scoring is a 3, 2, 1 or 0 for each question with 45 points possible.

- _____ 1. There is evidence that the administrator exudes high expectations for everyone under their supervision; Learning goals are communicated to parents and stakeholders. (1.3.1)
- _____ 2. The administrator recognizes the efforts of staff to utilize rigorous LIAs to define and lead a school's culture and drive a sense of urgency. A culture of using objective data involving all staff members is exhibited. (1.3.2)
- _____ 3. Building instructional time and routines are systematically monitored to allow innovative opportunities for increased/enhanced instructional time. (1.3.4)
- _____ 4. Monitoring collaborative efforts and collaborative practices to ensure a constant focus on student learning, solving specific challenges, and holding teams accountable for their results while encouraging a culture where teachers make correction to their instructional approaches based on personal reflection (1.2.3)
- _____ 5. Monitors the effectiveness of the systems involved and/or conducts the recruiting, hiring, and support of effective teachers who are diligent individuals who fit a rigorous school culture. Personnel are placed in positions to ensure that all students have equal access to highly effective teachers (1.1.1)
- _____ 6. Treats staff fairly in monitoring the time and/or evaluation procedures to consistently improve the evaluation process, while utilizing teacher evaluation to credibly differentiate the performance of teachers as evidenced by an alignment between teacher evaluation results and building-level performance (1.1.2)
- _____ 7. Frequently provides learning opportunities for staff aligned to professional needs based on student academic performance data and teacher evaluation results. These opportunities come in a variety of formats including highly effective teachers supporting their peers and allowing for time and resources dedicated to these opportunities (1.1.3).
- _____ 8. There is evidence that the administrator designs and implements succession plans for every position in the school, while encouraging and supporting teacher leadership and progression on career ladders. These plans include opportunities for emerging leaders to have authority to complete leadership tasks, while recognizing and celebrating such leaders. (1.1.4)
- _____ 9. Encourages and supports staff members in seeking out responsibility for tasks within the building while monitoring and supporting staff in his/her management of such responsibilities. (1.1.5)
- _____ 10. The administrator uses staff placement to support instruction by leveraging teacher effectiveness to further generate student success by assigning staff to professional learning communities that compliment individual strengths and minimize weaknesses in ways such that support school goals and maximize student achievement. (1.1.6)
- _____ 11. Addresses those teachers evaluated in the Improvement Necessary and/or Ineffective categories by working cooperatively with those teachers in developing remediation. (1.1.7)
- _____ 12. Tracks remediation plans and stays in frequent communication with teachers on improvement plans to ensure necessary support is occurring (1.1.7)
- _____ 13. Supports a school-wide instructional vision and/or mission by defining long, medium and short-term application of the mission/vision. (1.2.1)

_____ 14. Monitors and measures progress toward the mission/vision. The administrator will frequently revisit and discuss the vision/mission to ensure appropriateness and rigor. (1.2.1)

_____ 15. Classroom observations will be used to support student academic achievement through systems and schedules that allow all teachers to be frequently observed. Observations allows for feedback provided directly to the teachers and allows for an opportunity to give meaningful input. (1.2.2)

_____ **Total Score out of 45 points possible**

Evidence: (Classroom observation forms, building schedules, staff meeting agendas, professional development opportunities, multi-media communication forms, school data files)

Leadership Actions: Administrators are deliberate in making decisions to raise student outcomes and drive teacher effectiveness. Certain leadership actions are critical to achieving transformative results: (1) modeling the personal behavior that sets the tone for all student and adult relationships in the school; (2) building relationships to ensure all key stakeholders work effectively with one another; and (3) developing a school-wide culture of achievement aligned to the school's vision of success for every student. Scoring is a 3, 2, 1 or 0 for each question with 39 points possible

_____ 1. Modeling professional, ethical, and respectful behavior at all times, while expecting students and colleagues to display professional, ethical and respectful behavior at all times, as well. (2.1.1)

_____ 2. Articulates and communicates appropriate behavior to all stakeholders, while creating mechanisms, systems, and/or incentives to motivate staff/students/colleagues to do so. (2.1.1)

_____ 3. Establishes and monitors yearly, monthly, weekly and daily priorities and objectives by identifying and consistently prioritizing activities by placing the highest-emphasis on student achievement. (2.1.2)

_____ 4. Develops systems that actively solicit feedback and help from all key stakeholders. Acts upon feedback when appropriate to shape strategic priorities aligned to student achievement (2.1.3)

_____ 5. Consistently achieves and/or exceeds expected goals (as established with evaluator) by regularly identifying, communicating, and addressing the school's most significant obstacles to student achievement. (2.1.4)

_____ 6. Takes risks to support student achievement that includes establishing potential partnerships with groups/organizations. (2.1.4)

_____ 7. Aligns and ensures a culture of urgency that is sustainable by leading a relentless pursuit of continued academic and behavioral improvement. Progress should be celebrated. (2.2.1)

_____ 8. Messaging and monitoring the impact of key concepts (school's goals, needs, plans, successes and failures) by interacting with a variety of stakeholders (students, families, community groups, central office, teacher associations, etc.) and utilizing a

variety of communications approaches (face-to-face conversations, newsletters, websites, presentations, etc.). (2.2.2)

_____ 9. Using and guiding others to utilize effective strategies to work toward consensus for change and improvement while monitoring the success of such strategies, revising strategies, and securing cooperation and/or building consensus from key stakeholders in implementing change and driving improvement. (2.2.3)

_____ 10. Benchmarking and setting clear, high performance expectations for staff and students that model high performing schools. This includes setting clear expectations (and creating systems and approaches to monitor such) regarding academic, behavioral practices across all classrooms which in turn encourage a culture in which community members, staff, and students are able to clearly articulate school and personal academic goals. (2.3.1)

_____ 11. Creating ambitious academic goals and priorities that are accepted as fixed and immobile, which have systems to monitor and celebrate the progress towards achievements of such goals. (2.3.2)

_____ 12. Academic goals and priorities are clearly articulated with high expectations for all staff, including rules and procedures that maintain a safe and positive culture which reflect a demonstration of the values, beliefs, and attitudes that inspire staff and students to higher levels of achievement. (2.3.2)

_____ 13. Data will be used as a basis for informed decision-making by the administrator and staff which is transparent, communicated to all stakeholders, monitored to formulate action plans, and includes review of further areas for additional data. (2.3.3)

_____ **Total Score out of 39 points possible**

Evidence: (Logs or hard copies supporting items of interest to each question.)

Managerial Leadership: Administrators manage their fiscal resources and buildings with integrity and the best interest of students in mind. They focus their fiscal resources on student learning and ensure that their buildings provide the best learning atmosphere possible. Facilities are safe, well-maintained, and available to support student and community activities. Scoring is a 3, 2, 1 or 0 for each question with 6 points possible

_____ 1. Help develop, leverage, and prioritize resources to fully fund instructional initiatives necessary to achieve school goals and student outcomes while monitoring and meeting all fiscal, physical and personnel resources efficiently and effectively. (3.1.1)

_____ 2. Effectively supervises for the safe and effective operation and maintenance of school. (3.1.1)

_____ **Total Score out of 6 points possible**

Evidence: (Hard copies of examples)

Professionalism: Administrators display the highest degree of integrity, character, and ethics at all times. They are exemplary examples to both students and staff and are highly respected by

their staff and their communities. An atmosphere of trust and respect is evident in the interaction of staff and students. Scoring is a 3, 2, 1 or 0 for each question with 9 points possible

_____1. Conscientiously and routinely studies and maintains the school's compliance with local/state/national laws and district policies while ensuring that professional, ethical and respectful behavior is maintained at all times. (4.1.1)

_____2. Communicates and demonstrates mechanisms, systems, and/or incentives that establish the expectation of students and colleagues valuing diversity, encouraging an inclusive environment, and display of professional, ethical, and respectful behavior by staff and students at all times. (4.1.1)

_____3. Exhibits excellence in attendance, models punctuality for meetings, and establishes timelines/routines/mechanisms/procedures/policies for timely/methodical communication to staff and students of events, required meetings, building/district/state report completion, etc. (4.1.2)

_____ **Total Score out of 9 points possible**

Evidence: (Notes and logs.)

Mandatory Core of Professionalism: School Leader is given one evaluation point through their ongoing professional core of performance necessary for success. These include the following mandatory areas: Attends school events as needed and expected; is cooperative with peers and supervisors; follows all rules, procedures, board policies and mandates set forth by the school corporation; and sets the example for his/her staff for timeliness and attendance.

_____ **One Point or No Points Awarded Possible**

Evidence: (None needed unless an area is deemed Improvement necessary to maintain his/her position.)

Part A Total Overall Score: _____(Out of a total 100 points possible)

Part A Evaluation Summary Comments:

PART B EVALUATION FORM FOR SCHOOL LEADER

A school leader receives the same grade as his/her school but only after two years in the job.

Grade of A = 100 points = Highly Effective

Grade of B = 80 points = Effective

Grade of C = 60 points = Improvement Necessary

Grade of D = 40 points = Improvement Necessary

Grade of F = 20 points = Ineffective

Bonus points = 15 for Four Star School Status

Evidence: (None needed unless an area is deemed Improvement necessary to maintain his/her position.)

Part B Total Score: _____ (Out of a total 100 points possible)

Part B Evaluation Summary Comments:

Part A and Part B Total

Ineffective	Improvement Necessary	Effective	Highly Effective
Performance frequently exhibits weaknesses that negatively impact students, staff, and the school climate. Points 40 - 79	Performance typically exhibits strengths that impact students, staff, and school climate. Point 80 - 119	Performance typically exhibits multiple strengths that favorably impact students, staff, and the school climate. Points 120-159	Performance consistently exhibits multiple strengths that have strong, positive impact on students, staff, and the school climate. Point 160-200

Total Points

Part A Total Score _____

Part B Total Score _____

Part A and B Total Score _____ (Out of a total 200 points possible)

Signatures

School Year _____

Date of Post Conference Evaluation Meeting _____

School Leader Name

Signature

I acknowledge that I have reviewed and discussed this evaluation.

Board of Directors Name

Signature

Appendix O.5: References

Pathways In Education – North Carolina

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Appendix O.6: Professional Development Plan

Pathways In Education-North Carolina



Pathways In Education – North Carolina Professional Development Plan

One of the most-effective forms of learning for teachers occurs while they are teaching. This is accomplished through instructional coaching. PIE-NC will utilize the High-Quality Teaching Initiative (HQTl) framework that is used in all Pathways In Education schools. Instructional leaders in the schools utilize HQTl as a tool for teachers to not only self-reflect, but also provides areas to focus coaching supports. The HQTl is a non-evaluative tool that leads to shared discussions on growth for individuals and the larger team. Instructional coaching will support teaching and learning in the classroom and at the independent studies desk to increase teachers' capacity in their positions. HQTl is differentiated for the independent study and the small group instruction role.

All teachers will go through a minimum of two coaching cycles a year. Teachers will complete a self-assessment using the HQTl for their role and create a goal with their site administrator around the areas they want to improve. The site administrator will set up a formal observation during the coaching cycle to gather evidence which they will tag to the HQTl rubric to determine areas of strength and growth. At the end of each conference, site administrators and teachers will discuss the observation and evidence and determine next steps to help the teacher reach their goal. Both site administrators and instructional coaches will be informally observing teachers in between formal observations to give targeted feedback on their practice.

Teacher Evaluation

PIE-NC's vision is to create an environment of growth and high expectations through relevant professional development that results in a measurable increase of student achievement, teacher performance, and leadership capabilities. In order for professional development to be successful and have the desired impact, PIE-NC has created a comprehensive plan that provides required professional learning and an opportunity for choice. The majority of professional learning will happen through internal methods, especially during the first year of operation. The plan includes the new staff training for two weeks before the start of school (most sessions will be uniform, with individualized sessions based on role), and external opportunities at outside conferences, workshops, and online sessions. Teachers will also have the ability to attend virtual professional development sessions with the instructional team and other teachers through professional learning communities. The professional development plan is designed to support the Pathways mission, vision, and core values. The ultimate goal is for teachers to build their toolkit to push their students forward while utilizing data to identify areas of need.

Examples of some of our trainings for key elements of the plan include:

Topic	Responsible Party	Method
Instructional professional development to support the effective implementation of Common Core and North Carolina Essential Standards and corresponding state assessments	Internal: Assessment	Individualized to subject area, but all instructional staff will receive aspects that are uniform.
Pathways In Education curriculum including, but not limited to, independent study, small group instruction, and online learning platforms	Internal: Instructional Coaches	Uniform
Effective instruction in the independent study model including, but not limited to, student pacing, feedback, accountability, checks for understanding, and study skills for students	Internal: Instructional Coaches	Uniform to independent study teachers
Effective instruction in the small group instruction environment, including, but not limited to, lesson planning, learning targets, student engagement, classroom culture, feedback, checks for understanding, student grouping, and effective teaching strategies	Internal: Instructional Coaches	Uniform to small group instruction teachers
Effective teaching instruction in an online platform for courses including, but not limited to, student pacing, feedback, accountability, checks for understanding, and study skills for students	Internal: Online Program	Uniform for all teachers
Sexual harassment and discrimination training	Internal: Human Resources	Uniform
Suicide prevention policies and mandated reporting	Internal: Human Resources	Uniform
English Learners <i>EL Assessment - Access 2.0 (through WIDA)</i> Strategies to support English learners	External: NCDPI resources and trainings	Individualized for teacher need
Assessment <i>State webinars for state assessment</i> <i>College Board - virtual SAT, ACT, PSAT, etc.</i>	External	Uniform
Interventions Renaissance STAR, Achieve 3000, Accelerated Math	Internal and External	Uniform training on the basics and

		individualized for teacher role and subject
Special Education: compliance, how to best support students with disabilities, and instructional practices	Internal	Individualized
The Right Mindset: analyze how words, attitudes, and preconceived ideas form the implicit and explicit expectations we have and verbalize for students and how we change them	Internal	Individualized
Boost Student Work Completion: Identify strategic ways teachers can significantly boost student work completion including, but not limited to: in-the-moment conversations with students when they come unprepared, initial orientation conversations with parents about work completion, schedule adjustments to reinforce expectations, use of the student planner as a tool for creating student ownership, buy-in, and accountability, and how all staff members can reinforce and boost student work completion	Internal	Individualized

Professional Learning Communities: One of the foundations for professional learning in PIE-NC will be the use of Professional Learning Communities (PLC). During regular PLC time, teachers will analyze their student data to inform instructional supports for students. PLC members will regularly share data so that others can learn from successes as well as have a chance to discuss where future opportunities for growth lie. PLC time will also be utilized for book studies. The books selected are based on topics that will have an impact on school culture, achievement and student well-being.

Initial Professional Development Prior to Opening

PIE-NC’s Professional Development realizes that the school’s unique program requires specialized training and development to ensure all stakeholders are successful. PIE-NC offers a spectrum of comprehensive professional development for staff to ensure an understanding of the school culture and their instructional roles.

During the two weeks leading up to the school opening, all staff will participate in a detailed onboarding process to ensure they are prepared and acclimated to the school culture. After completing new-hire paperwork with a member of the Human Resources Department or a member of the charter leadership team, new staff meets with an instructional coach and site leader to receive further training on expectations. This includes, but is not limited to, rules, dress codes, contact information for site specific leadership staff, communication procedures, and information on their further training.

In addition to onboarding, staff will participate in a two-week induction period. PIE-NC professional development topics include (but are not limited to):

- Culture
- Curriculum
- Instructional strategies to meet the needs of all learners
- Using technology as a resource
- Equity
- Time management
- High expectations

- Compassionate pushing
- Formative feedback
- Teaching as leadership
- Bullying
- Restorative practices
- Multi-Tiered Systems of Supports (MTSS)
- Student Tracking System
- HQTl
- Online Programs

An example of a new school PD session is below:

PIE NEW SCHOOL PD SESSION OVERVIEW

WEEK 1 Focus: Instruction				
DAY 1				
#	Session	Participants	Objective	Description and Outcome
1-A	New Staff Onboarding <i>Led by HR Staff</i>	All staff	To welcome new staff members and complete new hire paperwork as well as review employee guidelines and benefits.	Newly hired staff members will be welcomed to PIE as well as review and complete needed paperwork for the hiring process.
2-A	Welcome to new staff training The basics of the school <i>Led by instructional team</i>	All staff	To introduce and familiarize staff to the school's culture and vision. Staff will have an understanding of the organizational structure (big picture) and how the center specific roles work together.	Pathways 101 <ul style="list-style-type: none"> ● Pathways Culture ● Mission/Vision/Core Values ● Overview of organization and where your role fits in
3-A	Instruction and Curriculum Part 1 <i>Led by the instructional team</i>	All staff	To show new staff how we support the "whole student" and introduce the programs they will encounter.	Introduction to Pathways curriculum <ul style="list-style-type: none"> ● Student Activity Workbooks ● Online Program - Edmentum ● Small Group Instruction courses
4-A	Instruction and Curriculum Part 2 <i>Led by the instructional team</i>	Independent Study Teachers	To familiarize independent study teachers to the most commonly used form of curriculum.	Student Activity Workbooks <ul style="list-style-type: none"> ● Formative Assessments ● Performance Tasks ● Introduction to Online Assessment
4-B	Instruction and Curriculum Part 2 <i>Led by the instructional team</i>	Small Group Instruction Teachers	To introduce small group instruction (SGI) teachers to the format of SGI classes.	Introduction to unit planning, course scope and sequence <i>Learn about resources available</i>

Day 2				
#	Session	Participants	Objective	Description and Outcome
5-A	Online Program Part 1 <i>Led by the online program team</i>	Independent Study Teachers and Small Group Instruction Teachers	To introduce teachers to Edmentum.	Introduction to Edmentum <ul style="list-style-type: none"> ● <i>Navigating the website</i> ● <i>How to enroll students</i> ● <i>Monitoring student engagement</i> ● <i>A Day in the life of an OP student</i> <ul style="list-style-type: none"> ○ <i>Coursework</i> ○ <i>Study sheets</i> ○ <i>Taking classes</i> ○ <i>Platform navigation</i> ● <i>Assessment Compliance</i> ● <i>Grading</i>
6-A	Online Program Part 2 <i>Led by the online program team</i>	Independent Study Teachers and Small Group Instruction Teachers	To engage teachers on the Edmentum website platform.	Introduction to Edmentum Continued <ul style="list-style-type: none"> ● <i>Navigating the website</i> ● <i>How to enroll students</i> ● <i>Monitoring student engagement</i> ● <i>A Day in the life of an OP student</i> <ul style="list-style-type: none"> ○ <i>Coursework</i> ○ <i>Study sheets</i> ○ <i>Taking classes</i> ○ <i>Platform navigation</i> ● <i>Assessment Compliance</i> ● <i>Grading</i> ● <i>Hands-on practice</i>
Day 3				
#	Session	Participants	Objective	Description and Outcome
7-A	Learning Periods and Units <i>Led by the instructional team</i>	All Staff	To familiarize staff with what a learning period is, and how the numbers are calculated through Carnegie Units.	<ul style="list-style-type: none"> ● <i>Breakdown of learning periods</i> ● <i>How Carnegie Units are used</i> ● <i>Accelerated Progress</i>
8-A	Enrollment <i>Led by the instructional team and site administrator</i>	All Staff	To familiarize staff with the enrollment process.	<ul style="list-style-type: none"> ● <i>Pre-registration</i> ● <i>Process for enrollment</i> ● <i>Student-trac: create and enroll a mock student</i>
9-A	Orientation <i>Led by the instructional team and site administrator</i>	All staff	To practice presenting the orientation.	<ul style="list-style-type: none"> ● <i>Orientation is pre-created with leadership</i> ● <i>Site administrator leads staff through a mock orientation</i> ● <i>Staff practices and presents the orientation to one another for feedback</i>
10-A	Guides and Goals	All staff	To inform staff of the guides and goals process.	<ul style="list-style-type: none"> ● <i>Analyze a transcript</i> ● <i>Fill out planning guide</i> ● <i>Enter courses into Student-trac</i> ● <i>Discussion of how to set up a student schedule when they</i>

				enroll (rigorous classes, SGI, etc.)
Day 4				
#	Session	Participants	Objective	Description and Outcome
11-A	Center Team <i>Led by the instructional team and site administrator</i>	All staff	Staff will understand the differences between IS and SGIs and how they work together toward a common goal.	<ul style="list-style-type: none"> ● IS/SGI shared and separate responsibilities ● Communication between staff members (hourly/daily/weekly/monthly) ● Creation of a written agreement ● Establish communication processes with families
12-A	Student attendance and truancy	All staff	To familiarize staff with the attendance policies.	<ul style="list-style-type: none"> ● Review attendance policies ● Review how students sign-in for attendance ● Learn and understand the truancy policy ● How to enter attendance
13-A	Routines and Procedures	Independent Study Teachers	To explore workspace set-up and organizational tools for independent study.	<ul style="list-style-type: none"> ● Maximizing workspace ● Organization and best practices ● Work time: set up based on pre-determine center theme
13-B	Routines and Procedures	Small Group Instruction Teachers	To think through classroom set-up and routines for the Small Group Instruction classrooms.	<ul style="list-style-type: none"> ● Classroom set-up ● Classroom routines and expectations (i.e. attendance policies) ● Work time: set up based on pre-determine center theme
14-A	Appointment Time	Independent Study Teachers and Center Coordinators	To familiarize independent study teachers and center coordinators with the appointment routines.	<ul style="list-style-type: none"> ● Review appointment time structures and best practices ● Determine routines to use as a site ● Learn how to communicate with students regarding the appointment
14-B	Pacing: Unit Planning/ Scope and Sequence	Small Group Instruction Teachers	To create whiteboards for SGI courses.	<ul style="list-style-type: none"> ● Rosters ● Overview of resources available ● Work time: Unit planning for SGI course
Day 5				
#	Session	Participants	Objective	Description and Outcome
15-A	Special Education in Independent Study 101 <i>Led by Special Education team</i>	All staff	<p>To inform teachers of Special Education methodologies that work in the IS model.</p> <p>To inform teachers of Special Education compliance indicators.</p>	<ul style="list-style-type: none"> ● Review special education compliance ● Learn how special education works in independent study ● Learn how the special education teacher works with the other roles ● Learn what to do at enrollment if a student enrolls with an IEP/504 plan

WEEK 2 Focus: Application and Practice				
Day 1				
#	Session	Participants	Objective	Description and Outcome
16-A	Data Driven Interventions	Instructional staff	Identify strategic ways teachers can significantly boost student mastery.	<ul style="list-style-type: none"> • Introduction to English learner strategies • Introduction to Accelerated Math • Introduction to Renaissance STAR • Introduction to Achieve 3000
17-A	Application of interventions	Instructional staff	Teachers incorporate intervention strategies for easily accessible use in their areas.	<ul style="list-style-type: none"> • Dive deeper into intervention strategies • Create resources
Day 2				
#	Session	Participants	Objective	Description and Outcome
18-A	High Quality Teaching Initiative (HQTI) <i>Led by the instructional team</i>	Instructional staff	To acclimate teachers to the Pathways in Education teacher evaluation system.	<ul style="list-style-type: none"> • Review HQTI rubric • Identify indicators • Utilize self-assessment to determine areas of strength and growth
19-A	HQTI continued - observation cycle	Instructional staff	To explore the observation cycle.	<ul style="list-style-type: none"> • Review of observation cycle and expectations
Day 3				
#	Session	Participants	Objective	Description and Outcome
20-A	State of the School Address	All staff members	Identify goals for the school year.	The school principal will address the goals for the school year with the entire PIE-NC staff.
21-A	Teambuilding Activity	All staff members	To engage in a collaborative activity to promote teambuilding.	Staff members will work together to solve a problem or situation. Staff will have to problem-solve to get a solution.
22-A	Focused Work Time & 1:1 Check ins with administrator	All staff members	To check in with administrators.	Teachers will prepare paperwork for registration. Teachers will model and practice student orientations. The principal will meet with each teacher one-on-one to do a pulse check.
Day 4				
#	Session	Participants	Objective	Description and Outcome
23- A	Parent Engagement- Part 1	All staff members		<p>All staff focuses on working together to create a draft for our Parent Engagement Plan in a way that truly promotes increasing parent presence, communication, response, and partnership. Outcomes should include:</p> <ul style="list-style-type: none"> • The Parent Engagement Plan draft including actionable items that the entire staff supports and can participate in. • Monthly parent communication tool

				<ul style="list-style-type: none"> • A quarterly parent involvement event/opportunity at the center • Use of the Student Planner, phone calls, home visits, and email as communication tools
24-A	Parent Engagement- Part 2	All staff members		<ul style="list-style-type: none"> • Staff creates a list of clear, achievable actions that each can schedule, with attendance goals attached • Examples: <ul style="list-style-type: none"> ○ Schedule a Back to School Night for each center with attendance goals ○ RSP teachers schedule a parent information night about parent rights, with attendance goals ○ SGI teachers schedule SGI Open House for fall and spring, with attendance goals
25-A	Building Relationships with Parents- Part 1	All staff members		How staff should use of registration time with parents as an opportunity to build sustainable relationships and create partnerships to support student success, increase work product completion, and increase student retention
26-A	Building Relationships with Parents- Part 2	All staff members		<ul style="list-style-type: none"> • Develop plans for a staff meeting to roll out this plan • Develop plans for starting home visits during the summer months • Discuss guidelines for home visits and role play home visits
Day 5				
#	Session	Participants	Objective	Description and Outcome
27-A	Make Every Interaction Count	All staff		Internalize how every interaction is an opportunity to move students forward...not move them out of our program.
28-A	Teambuilding	All staff	Staff will develop the core values of mutual trust, mutual respect, and build a sense of camaraderie as a team.	

Ongoing Professional Development

PIE-NC realizes that professional development needs to occur on a regular basis to have an impact. Throughout the school year, professional development days will be scheduled for two full days a month. These sessions will be aligned to our school mission and vision as well as areas of focus. These focus areas are based on teacher/staff input, student achievement data and education research regarding best-practices.

Staff members will be able to use Fridays as a time to schedule professional learning sessions with the instructional support team on the days that they do not have full professional development days. During these times, staff members will be participating in professional learning communities, content specific professional development, and training on various pieces of the HQTl to help move them to their goals.

Taking into account the trainings that happen prior to the start of the school year and the time available throughout the year, teachers at PIE-NC will receive over 100 hours of professional development throughout the school year. This includes full day professional development, PLCs, and trainings with the instructional team. The school schedule and staffing structure lends itself to allow many opportunities for teachers to collaborate and participate in professional learning.

Appendix O.7: Application Fee

Pathways In Education – North Carolina

NC DPI

06/15/2020

Check 22795

Document No.	Document Date	Posting Description	Amount	Discount	Net Amount
2020 Charter Application	06/11/2020	2020 Charter Application for PIE NC	1000.00	0.00	1,000.00
NC DPI		Pathways Management Group, Inc.		Total	1,000.00

Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

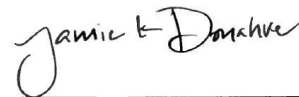
East West Bank
 624 South Grand
 Avenue
 Suite 100
 Los Angeles, CA
 90017

22795
 16-7038/3220

06/15/2020

Void after 180 days
 \$*****1,000.00

*****One Thousand and 00/100



 AUTHORIZED SIGNATURE

 AUTHORIZED SIGNATURE

**PAY TO THE
 ORDER OF** NC DPI
 Office of Charter Schools
 6303 Mail Service Center
 Raleigh, NC 27699

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Appendix O.8- Staffing Plan and School Org Chart

Pathways In Education – North Carolina

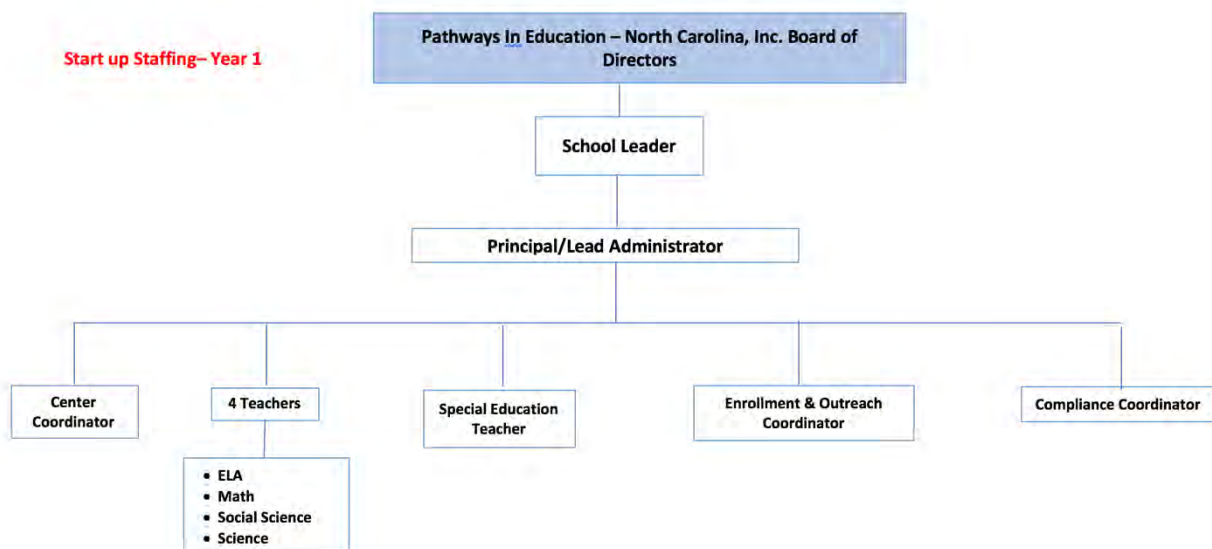


Pathways In Education – North Carolina

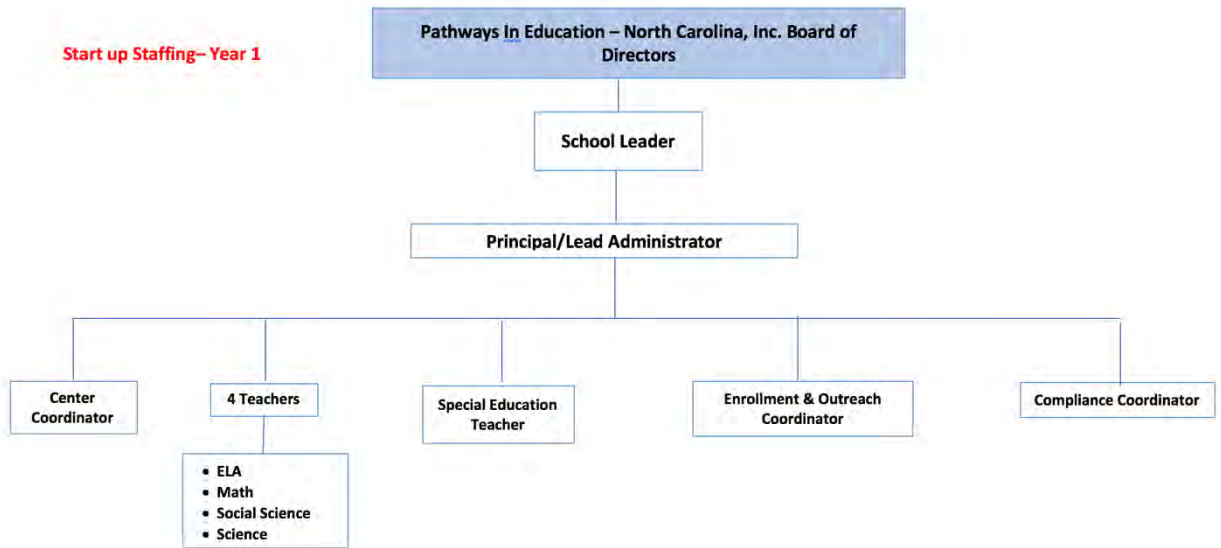
School Leadership/Organization

Pathways In Education (PIE-NC) will have a Principal/Lead Administrator who will report to the School Leader. The School Leader will report to the Board of Directors. All school employees will report to and be evaluated by the Principal. The Principal will make day-to-day operational decisions.

The organization chart included below outlines the staffing and reporting structure of PIE-NC for both the start and then end of the first school year. The School Leader for PIE-NC will report to and be evaluated by the Board of Directors following the NC Supervisory Evaluation Framework. Under the School Leader’s supervision, the school will be led by the Principal/Lead administrator, who in turn will oversee the general education (ELA, math, social science, science) and Small Group Instruction Teachers (ELA, math, science), Special Education Teacher, Post-Secondary and Student Services Counselor, Compliance Coordinator, Center Coordinator, and other support staff such as Enrollment & Outreach Specialist, Tutors and Substitute Teachers.



Start up Staffing– Year 1



PIE-NC Staff

School Leader: The School Leader’s primary directive is to accomplish the goals of the Board of Directors and Instructional Team in academics, student progression, and school culture. These three priorities should be reinforced by general oversight of small group instruction, student assessment, data analysis, professional development, accreditation, charter/contract renewals and new charter/contract openings as well as the development and coaching of the Principal. This position maintains and fosters relations with chartering district officials, schools boards and community based organizations. The School Leader is responsible for the general oversight “on the ground” of all developing operations and facilities.

Principal/ Lead Administrator: The Principal is the instructional leader and an integral part of the structure of the school. The Principal will serve as the chief administrator in developing and implementing policies, programs, curriculum activities, and budgets in a manner that promotes the educational development of each student and the professional development of each staff member. The Principal will be selected and evaluated based on the criteria set forth in the Louisiana Standards for Effective Principals.

Below is a chart showing a more detailed list of the Board’s expectations for the School Leader and Principal, both in capacity as instructional leaders and as school managers:

Instructional Leader	Effective Manager
<ul style="list-style-type: none"> ● Understands effective teaching and learning ● Analyzes data to improve 	<ul style="list-style-type: none"> ● Hires high quality staff members ● Manages school budget ● Reports to board on data, school

<p>achievement</p> <ul style="list-style-type: none"> ● Provides professional learning and development ● Understands Professional Learning Communities ● Skilled at providing feedback and evaluations to support growth ● Builds school climate and culture that supports equity and diversity 	<p>events and personnel</p> <ul style="list-style-type: none"> ● Manages day-to-day operations, ensuring a safe environment ● Demonstrates knowledge of federal and state education law, IDEA, Section 504 and FERPA compliance
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Assistant Principal/ Assistant Administrator: The Assistant Principal provides support with teacher development and professional development to help improve teacher performance, and is responsible for academic and retention of students. This position is primarily responsible for delivering our educational program to ensure data driven, results-based instruction for students in the implementation of the Common Core Standards. Assistant Principal will be selected by and will report to the Principal.

Teacher: A Teacher’s duties are to ensure that students receive quality instruction, make educational progress, and reach their academic goals. PIE-NC will have multiple Individualized Instruction Teachers, Small Group Instruction Teachers, and Special Education Teachers.

Post-Secondary and Student Services Counselor (PSSC): The PSSC is responsible for providing counseling support, identifying opportunities for students, and serving as the primary resource for students and teachers regarding post-secondary planning and options. They will help students become eligible for and knowledgeable about post-secondary options by meeting individually with students, using data, conducting workshops and designing activities to support students with their post-secondary plans. The PSSC will also coordinate field trips to local colleges and career resources to maximize student exposure to potential opportunities.

Center Coordinator: The Center Coordinator is a classified position primarily responsible for ensuring the day-to-day operations of the school and ensuring that everything is running efficiently. The Center Coordinator works closely with students and parents enrolling at PIE-NC.

Compliance Coordinator: The Compliance Coordinator is a classified position that supports staff with the preparation of student files and maintains data in all internal and external systems.

Enrollment & Outreach Coordinator: The Enrollment and Outreach Coordinator is a classified position that will be responsible for attracting students and enrolling students in PIE-NC. This position will collaborate with the School Leader and Principal in creating collateral, canvassing the community through various avenues including door to door campaigns, leading information sessions and tours for interested families, and supporting families through the enrollment process. COC will also be a primary resource for students and teachers regarding post-

secondary career options. The Career Pathways Coordinator will help students understand post-secondary options by meeting individually with students, using data, conducting workshops and designing activities that will increase the number of students participating in Workforce Innovation Opportunity Act (WIOA), CTE, and dual enrollment.

Substitute Teacher: The Substitute Teacher serves all facets of the blended learning program at PIE-NC. This includes support with Small Group Instruction and following up with lesson plans to provide instruction to a classroom of students, and help with administrative duties such as grading. The Substitute Teacher monitors student progress and testing, provides academic support, tracks student scheduling and progress, administers tests, provides academic support, and grades. This position can also provide support to Center Coordinator by fielding phone calls to current and prospective students and their guardians.

Tutor: The Tutor's primary responsibility is to assist teachers in teaching the necessary concepts to students within the designated math units. Provides direct non-certificated instructional support 100% of the time.

Please see all staff Job Descriptions for further details.

Key Qualities of Principal

The PIE-NC Principal will be critical to the success of the school. The Principal will be a proactive instructional leader who is a role model for all stakeholders. The leadership qualities expected of the principal of PIE-NC are based on research that ties principal quality and student outcomes.¹

PIE-NC principal will:

- Shape a vision of academic success for all students based on high standards.
- Create a climate hospitable to education so that safety, a cooperative spirit, and other foundations of fruitful interaction prevail.
- Cultivate leadership in others so that teachers and other adults assume their parts in realizing the school vision.
- Improve instruction to empower teachers to perform at the highest level, maximizing student learning.
- Manage people, data and processes to foster school improvement.

Roles of the Board of Directors and Administrators

The School Leader and Principal will be the primary liaisons between PMG and the PIE-NC Board of Directors. They will provide regular updates to the Board at each of the meetings on school progress, achievements, and any issues that may arise. Through analysis of school achievement data, review of financial reports, and staff evaluations, the School Leader and Principal, in consultation with PMG, will decide on program changes and staffing. They will work closely with PMG's school implementation team to accomplish all school start-up priorities and

¹ Krasnoff, Basha (2015). "Leadership Qualities of Effective Principals." *Northwest Comprehensive Center at Education Northwest*. Retrieved from <https://nwcc.educationnorthwest.org/sites/default/files/research-brief-leadership-qualities-effective-principals.pdf>

to develop the staff at PIE-NC. The School Leader and Principal will provide instructional support and evaluation of teachers and staff.

Roles/Responsibilities	Board of Directors	School Leader/ Principal
General	Governs the school	Advises the Board - manages the school
Policy	Adopts	Suggests and implements
Board Meetings	Leads	Serves as resource
Personnel	Establishes criteria, approves, or rejects	Interviews, recommends, hires, evaluates, promotes, trains
Community Relations	Creates a positive image for school	Creates a positive image for school, directs communications
Labor Relations	Provides guidelines	Monitors process within guidelines
Facilities	Develops usage policy	Implements policy, writes procedures, makes recommendations

Evaluating the Principal

As the instructional leader of PIE-NC, the Principal affects the overall quality of teaching and learning. The purpose of a supervisory evaluation system is to support the Principal's growth and development while simultaneously holding him or her accountable for student success. PIE-NC's Board of Directors will evaluate the Principal using the NC Supervisory Evaluation Framework. The Board will complete the evaluation of the Principal once per year, as required by North Carolina Code. The timeline of the evaluation will follow North Carolina Code, and will be written out in policy adopted by the Board of Directors after the charter petition is approved.

PIE-NC is planning to hire the second PIE-NC location staff on June 2023 to start the orientation, training, professional development, student recruitment and enrollment for Fall 2023.

Appendix O.9 – The Board of Directors Organizational Resolutions

Pathways In Education – North Carolina

**ORGANIZATIONAL RESOLUTIONS
OF
THE BOARD OF DIRECTORS OF PATHWAYS IN
EDUCATION – NORTH CAROLINA, INC.**
a North Carolina nonprofit public benefit corporation

The Board of Directors of Pathways in Education – North Carolina, Inc., a North Carolina nonprofit public benefit corporation (“Corporation”), adopts the following resolutions:

Ratification of Actions of Incorporator

RESOLVED, all actions of the incorporator in incorporating the Corporation and as were appropriate in connection with the establishment of the Corporation, whether before or after incorporation, are ratified and approved in all respects.

Ratification of Articles of Incorporation

RESOLVED, the Articles of Incorporation of Pathways in Education – North Carolina, Inc., attached to these resolutions as **Exhibit A**, are ratified.

Adoption of Bylaws

RESOLVED, the Bylaws of Pathways in Education – North Carolina, Inc., attached to these resolutions as **Exhibit B**, are adopted as the Corporation’s Bylaws; and

RESOLVED FURTHER, the Secretary of the Corporation is authorized and directed to execute a certificate of adoption of the Bylaws, insert the certified Bylaws in the Corporation’s minute book, and see that a copy of the Bylaws is kept at the Corporation’s principal office.

Establishment of Number of Directors

RESOLVED, the number of positions on the Board of Directors of the Corporation is seven (7), unless and until changed by a resolution of the Board or amendment of the Bylaws.

Submission of Charter Application and Designation of Lead Petitioner

WHEREAS, the Corporation aspires to open a new charter school to serve students in North Carolina;

WHEREAS, the Corporation recognizes the need to submit an application to operate a charter school in North Carolina to the North Carolina State Board of Education;

WHEREAS, the Corporation desires to grant authority to Nicholas Perez to submit the application on behalf of the Corporation;

NOW, THEREFORE, BE IT RESOLVED, the Corporation hereby agrees to grant Nicholas Perez the authority to submit a charter school application for a new charter school in North Carolina to

the North Carolina State Board of Education and execute any documents associated therewith.

Agent for Service of Process

RESOLVED, Cogency Global, Inc., designated in the Articles of Incorporation as the agent of this Corporation for the purpose of accepting service of process on the Corporation, shall serve as such agent until resignation or a new agent for service of process is designated by the Board.

Bank Account

RESOLVED, Subject to approval of Corporation's Charter School Petition submission to the North Carolina State Board of Education (the "Charter Petition"), the Corporation's officers, acting individually or together, or a designee, are authorized and directed to open one or more accounts on behalf of the Corporation at one or more federally insured banks or financial institutions as they deem necessary or desirable; and

RESOLVED, FURTHER, such officers, acting individually or together, or a designee, are also authorized to execute and deliver the standard form of resolutions required by such bank(s) or financial institution(s) for opening corporate bank accounts. The resolutions shall specify the types of accounts, the persons authorized, and the manner of signing for such persons, to draw on the accounts. The Secretary of this Corporation is authorized and directed to execute the Certificate of Secretary included with such resolutions and to affix the corporate seal of this Corporation thereto if so required. Such standard form of resolutions are adopted as the resolutions of the Board as if set forth in full herein; and

RESOLVED, FURTHER, the Secretary of this Corporation is directed to insert a copy of such standard form of resolutions and the related Certificate of Secretary in the Corporation's minute book of this Corporation immediately following these resolutions.

Accounting Year

RESOLVED, the Corporation's accounting year shall end on June 30 of each year.

Payment of Expenses

RESOLVED, the Corporation's officers, acting individually or together, or a designee, are authorized and directed to pay, from the Corporation's funds, the expenses of the incorporation and organization of this Corporation, and to reimburse, from the Corporation's funds, those persons who may have advanced the cost of such expenses on behalf of this Corporation.

Application for Tax Exemption

RESOLVED, subject to the approval of the Charter Petition, the Corporation's officers, acting individually or together, or a designee, are authorized and directed to make or cause to be made applications for federal and North Carolina tax-exempt status for the Corporation, including the filing of such forms and documents as the officers deem necessary or appropriate to obtain such tax exemptions for the Corporation.

Filing of Statement of Information with the North Carolina Secretary of State

RESOLVED, the Corporation's officers, acting individually or together, or a designee, are authorized and directed to make, or cause to be made, and filed with the North Carolina Secretary of State, a Statement of Information on behalf of the Corporation.

Approval of Engagement of Legal Counsel

RESOLVED, the Board approves the engagement of Beechler Tomberlin PLLC as legal counsel for this Corporation.

Procurement of Insurance

RESOLVED, subject to the approval of the Charter Petition, the Corporation's officers, acting individually or together, or a designee, are authorized and directed to procure insurance in amounts and types required by the Charter Petition and/or any Memorandum of Understanding in connection therewith and as adequate for the Corporation.

General Authorization

RESOLVED, the Corporation's officers, acting individually or together, are authorized and directed to execute and deliver all such documents and to take all such actions on behalf of the Corporation as they deem necessary or appropriate to carry out and accomplish the purposes of these resolutions, and any actions taken by them prior to the date of these resolutions to accomplish the purposes of these resolutions are ratified and confirmed.

The Secretary of this Corporation is directed to file these resolutions with the minutes of the proceedings of the Board of Directors.

BOARD MEMBER’S CERTIFICATE

I, James H. Wilkes Jr., Member of the Board of Directors of Pathways in Education – North Carolina, Inc., a North Carolina nonprofit public benefit corporation, hereby certify as follows:

The attached is a full, true, and correct copy of the resolutions duly adopted at a meeting of the Board of Directors of Pathways in Education – North Carolina, Inc. which was duly held on July 16, 2020, at which meeting all of the members of the Board of Directors had due notice and at which a quorum thereof was present; and at such meeting such resolutions were adopted by the following vote:

AYES: Linda Thomas, James H. Wilkes Jr, Patrice McClain Wright, Alvin Wallace, Queen Thompson, Tara Gibbs

NOES: N/A

ABSTAIN: N/A

ABSENT: N/A

The attached resolution is a full, true, and correct copy of the original resolution adopted at such meeting; and such resolution has not been amended, modified, or rescinded since the date of its adoption, and the same is now in full force and effect.

WITNESS my hand on July 23, 2020.

James H. Wilkes Jr.

Director
Pathways in Education – North Carolina, Inc.

Appendix O.10: The Board of Directors Conflict of Interest Policy

Pathways In Education – North Carolina



Pathways in Education – North Carolina, Inc.
Conflict of Interest, Anti-Nepotism
and
Standards of Conduct Policy
Disclosure of Financial Interest

WHEREAS, Pathways in Education – North Carolina, Inc. (“PIE-NC”) by its governing board desires to adopt a Conflict of Interest Policy (“Conflict of Interest Policy”), to ensure the independence of its board members and officers, the disclosure of any interests, financial or otherwise, that could impair an officer’s or governing board member’s independence, and to ensure the disclosure of any material conflicts;

WHEREAS, this policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations, including conflict of interest provisions found in Chapter 55A of the North Carolina General Statutes; and

WHEREAS, PIE-NC is committed to transparency in matters involving actual or potential conflicts of interest, including issues of nepotism.

NOW THEREFORE, be it resolved that the following Policy is hereby adopted as the policy of PIE-NC:

1. Statement of Policy

All Officers and Board Members are required to avoid any conflict of interest during their tenure or position with PIE-NC. Officers and Board Members are expected to conduct their personal affairs in a manner that does not affect PIE-NC’s integrity, reputation, or credibility. Off-duty conduct that affects the PIE-NC’s legitimate business interests or an Officer and/or Board Member’s ability to perform his or her work will not be tolerated.

2. Nepotism

Before any immediate family, as defined in G.S. 115C-12.2, of any member of the Board of Directors shall be employed or engaged as an employee, independent contractor, or otherwise by the Board in any capacity, such proposed employment or engagement shall be disclosed by

the Board Member to the Board of Directors and approved by the Board of Directors in a duly called open-session meeting. No teacher or staff member that is immediate family of the chief administrator shall be hired without the Board evaluating their credentials, establishing a structure to prevent conflicts of interest, and notifying the Department of Public Instruction, with evidence, that this process has occurred. If these requirements are met, the employment or engagement can be – but is not required to be – approved by the Board.

3. Interested Person

Any director, principal officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an Interested Person (“Interested Person”), for the purposes of this policy.

4. Financial Interest

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

- a. An ownership or investment interest in any entity with which PIE-NC has a transaction or arrangement,
- b. A compensation arrangement with PIE-NC or with any entity or individual with which PIE-NC has a transaction or arrangement, or
- c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which PIE-NC is negotiating a transaction or arrangement. Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

A financial interest is not necessarily a conflict of interest. Pursuant to this policy, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

5. Conflict of Interest Defined

A conflict of interest means any situation in which an individual’s financial, professional or other personal interests or involvements may directly or indirectly conflict with or affect such person’s independence or professional judgment in exercising any company duties or responsibilities and may include any direct or indirect financial interest of such individual in any business or entity that is a competitor, supplier or vendor of the Company or has any business dealings with the Company whatsoever.

A conflict of interest can also arise from an indirect interest. An indirect interest in a transaction exists if: (1) Another entity in which the Interested Person has a material financial interest or in which he/she is a general partner is a party to the transaction; or (2) Another entity of which an Interested Person is a director, officer, or trustee is a party to the transaction and the transaction is or should be considered by the Board or one of its committees.

6. Duty to Disclose

In connection with any actual or potential conflict of interest, an Interested Person shall disclose immediately upon the discovery of the existence of his or her financial interest, or any other interest that could be reasonably be perceived as having the potential to compromise the Interested Person's independence or professional judgment. The Interested Person will be given the opportunity to disclose all material facts to the PIE-NC Board of Directors ("Board") or to any board committee ("Board Committee") to which the board may have delegated power to consider the proposed transaction or arrangements. No voting member of the Board shall be an employee of a for-profit company that provides substantial services to the charter school for a fee. Except as expressly stated herein, a person shall not be disqualified from serving as a member of the charter school's Board because of the existence of a conflict of interest, so long as the person's actions comply with this conflict of interest policy.

7. Determination of Whether a Conflict of Interest Exists

After disclosure of the financial interest or other conflict and all material facts, and after any discussion with the Interested Person, the Board or Board Committee shall vote on whether a conflict of interest exists. The vote shall be taken without counting the Interested Person as part of the quorum and the Interested Person shall not be entitled to cast a vote. Before voting on the existence of a conflict of interest, the Board may take any of the following steps:

- a. The Interested Person may make a presentation at the Board or Board Committee meeting;
- b. The chairperson of the Board or Board Committee may, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

This discussion and vote must occur in open session unless grounds exist to hold the meeting in closed session pursuant to North Carolina law. If the Board or Board Committee determine a conflict of interest exists, the governing body can still approve the underlying transaction in accordance with this policy. The Board should also consider whether the Interested Person should be sanctioned.

8. Approval of Underlying Transaction

Notwithstanding the existence of a conflict of interest, the Board or Board Committee can approve the underlying transaction after exercising due diligence to determine whether the charter school can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing body shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the Organization's best interest, for its own benefit, and whether it is fair and reasonable.

9. Violations of the Conflict of Interest Policy

If the Board has reasonable cause to believe an Officer or Board Member has failed to disclose actual or possible conflicts of interest or has harmed the reputation of PIE-NC as a result of a conflict of interest, it shall inform the Officer or Board Member of the basis for such belief and afford such Officer or Board Member an opportunity to explain the alleged failure to disclose.

If, after the hearing the Officer's or Board Member's response and after making further investigation as warranted by the circumstances, the Board determines the Officer or Board Member has failed to disclose an actual or possible conflict of interest, it shall take disciplinary and/or corrective action as the Board or Board Committee deems appropriate.

10. Records of Proceedings

The minutes of the Board and Board Committees addressing issues of conflicts of interest shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the Board's or Board Committee's decision as to whether a conflict of interest in fact existed.
- b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

11. Annual Disclosure of Interests

Each year, during the month of the Board's annual meeting, each director, principal officer, and member of a committee with governing board delegated powers shall sign a statement which affirms such person:

- a. Has received a copy of the conflicts of interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy,
- d. Has fully disclosed all conflicts of which he/she is aware, and
- d. Understands the Organization is charitable and that to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

Every new director, principal officer, or member of a committee shall sign the statement described herein before attending his or her first Board or Board Committee meeting.

Appendix O.7: Application Fee

Pathways In Education – North Carolina

NC DPI

06/15/2020

Check 22795

Document No.	Document Date	Posting Description	Amount	Discount	Net Amount
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Pathways Management Group, Inc.
 320 N Halstead St.
 Pasadena, CA 91107

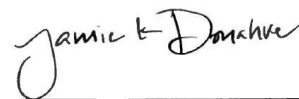
East West Bank
 624 South Grand Avenue
 Suite 100
 Los Angeles, CA 90017

22795
 16-7038/3220

06/15/2020

Void after 180 days
 \$*****1,000.00

****One Thousand and 00/100



AUTHORIZED SIGNATURE

AUTHORIZED SIGNATURE

PAY TO THE ORDER OF NC DPI
 Office of Charter Schools
 6303 Mail Service Center
 Raleigh, NC 27699

⑈022795⑈⑆32207038⑆1⑆803⑆100⑆1624⑈



Proposed Management Organization (EMO or CMO)

1. Does the Charter School plan to contract for services with an “educational management organization” or “charter management organization”?

Yes

No

Name of the Company: **Pathways Management Group**

Mailing Address: **320 N Halstead Street**

City/State/Zip: **Pasadena, CA 91107**

Phone Number: **626-375-7555**

Contact Person: **Kristi Duenas**

Email Address: **kristiduenas@pathwaysmg.org**

Website: <https://pmgcmo.org/>



Pathways In Education – North Carolina Budget Narrative

Pathways In Education-North Carolina generates revenue from state and local per pupil aid to the school. The Charter School also receives a per pupil share of state and federal funds per student with disabilities. In addition, Pathways In Education-North Carolina anticipates receiving a one-time loan from Pathways Management Group at a per annum interest rate of 50% of the lowest corresponding applicable Long Term Federal Rate posted by the Internal Revenue Service in the month in which any advance or disbursement is made. This low interest loan is to fund start-up costs and operational expenses until distribution of State aid. Pathways In Education- North Carolina does not rely on donations, grants, or fundraising for revenue. Based on this information we estimate the following amounts for revenue for year one as:

Revenue year one: \$5,161,435

Expenses

Expenses were estimated based on anticipated staffing levels and related costs (i.e. payroll, health benefits, and retirement obligations), the monthly per pupil fee Pathways In Education- North Carolina will pay to Pathways Management Group for its management Services, and other facility, student activity, and ancillary costs. Loan repayment will begin in year two. The estimated expenses are based on Pathways In Education's long history of implementing similar successful educational models throughout Illinois, Louisiana, Tennessee, Arizona, and Idaho.

The budget detail provided with this application gives more insight into our budget assumptions and cost drivers. Below we highlight some of the key elements to our program and their corresponding budget.

Other Revenue: Loan for startup period from Pathways Management Group \$2,600,000

Anticipated Start-up Costs

Administrative		
Principal	\$ 63,333.33	8 months prior to opening of \$95,000 annual salary 1 FTE

School Leader	\$ 52,500.00		1 Year prior to opening of \$105,0001 annual salary, half time
Administrative Staff	\$2,340.00		Admin Staff on site salary starts 1 month prior
Instructional Staff	\$ 53,620.00		Salary for 1 month prior to opening: ELA teacher, Math teacher, Science teacher, Social Science teacher, SPED teacher, Compliance Coordinator Salary for 5 months prior to opening: Pathways Career Coordinator
Payroll Taxes	\$ 13,743.47		Estimated 8% of total salaries (FICA: Social Security plus Medicare)
Benefits	\$ 32,640.73		Group Insurance Workers Comp 403B Contributions Paid Time Off
Recruiting/Marketing	\$ 40,000.00		Costs of promotional & marketing materials, public advertising, events prior to the school opening, recruitment fees included in management services
Total Administrative = \$ 258,177.80			
Supplies & Equipment			
Office Supplies	\$ 40,000		Start-up Office Supplies
Computers & Software (non-instructional)	\$ 100,000		Start-up Staff and Center Computers
Phone System	\$ 1,000		
Software (Instructional)	\$20,000		
Instructional Technology	\$100,000		
Curriculum/Texts	\$60,000		
Total Supplies & Equipment = \$321,000			

Facility			
Renovations & Repairs	\$ 875,000.00		\$125 sqft for 7,000 sqft Tenant Improvements
Rent/Lease	\$ 40,000.00		6 months prior to opening rent, CAM and Utilities included in the \$40,000
Fixtures & Furnishings	\$ 80,000.00		Estimate for 1 school site
Total Facility = \$ 995,000			
Contractual			
Legal	\$ 20,000.00		10 months prior to opening at \$2,000/month for legal fees
Total Contractual = \$ 20,000			
Total Expenditures = \$ 1,594,177.80			

Sustainability

Charter School Revenue Projections					
Revenue Source	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027
State ADM Funds	\$1,587,318	\$3,174,636	\$3,174,636	\$3,174,636	\$3,174,636
Local Per Pupil Funds	\$826,800	\$1,653,600	\$1,653,600	\$1,653,600	\$1,653,600
State EC Funds	\$147,317	\$294,635	\$294,635	\$294,635	\$294,635
Federal EC Funds	\$0	\$49,974	\$99,947	\$99,947	\$99,947
Other Funds	\$2,600,000				
Total	\$5,161,435	\$5,172,844	\$5,222,818	\$5,222,818	\$5,222,818

PIENC
Y-1 Cash Forecast

	Prior to Opening	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June
Beginning Cash	2,600,000	1,005,822	812,874	1,181,319	988,371	795,423	602,475	970,920	777,972	585,024	392,076	199,128	6,179
Cash In-flows		73,104	634,498	73,104	73,104	73,104	634,498	73,104	73,104	73,104	73,104	73,104	634,498
Cash outflots	1,594,178	266,053	266,053	266,053	266,053	266,053	266,053	266,053	266,053	266,053	266,053	266,053	266,053
Ending Cash	1,005,822	812,874	1,181,319	988,371	795,423	602,475	970,920	777,972	585,024	392,076	199,128	6,179	374,625

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: 600-Char.-Mecklenburg	What percentage of students from the LEA selected above will qualify for EC funding?	11%
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
Kindergarten	600			600			600			600			600		
Grade 1															
Grade 2															
Grade 3															
Grade 4															
Grade 5															
Grade 6															
Grade 7															
Grade 8															
Grade 9	100			200			200			200			200		
Grade 10	100			200			200			200			200		
Grade 11	50			100			100			100			100		
Grade 12	50			100			100			100			100		
LEA Totals:	300	0	0	600	0	0	600	0	0	600	0	0	600	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 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

In year 2 and Beyond: Base State allotments are determined by the LEA in which the student

Local Funds: Charter schools receive a per pupil share of the local current expense of the LEA

State EC Funds: Charter schools receive a per pupil share of state funds per student with disabilities 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

REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCES

LEA #1:		600-Char.-Mecklenburg	
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	
State Funds	\$5,291.06	300	
Local Funds	\$2,756.00	300	
State EC Funds	\$4,464.16	33	
Federal EC Funds	\$1,514.35	33	
			Total:

LEA #2:			
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	
State Funds		0	
Local Funds		0	
State EC Funds		0	
Federal EC Funds		0	
			Total:

LEA #3:			
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	
State Funds			
Local Funds			
State EC Funds			
Federal EC Funds			
			Total:



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RCE DOCUMENTS

Approximate funding for Year 1
\$1,587,318.00
\$826,800.00
\$147,317.28
\$49,973.55
\$2,611,408.83

Approximate funding for Year 1
\$0.00

Approximate funding for Year 1
\$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 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
State ADM Funds	\$ 1,587,318	\$ 3,174,636	\$ 3,174,636	\$ 3,174,636
Local Per Pupil Funds	\$ 826,800	\$ 1,653,600	\$ 1,653,600	\$ 1,653,600
State EC Funds	\$ 147,317	\$ 294,635	\$ 294,635	\$ 294,635
Federal EC Funds	-	\$ 49,974	\$ 99,947	\$ 99,947
Other Funds*	\$ 2,600,000			
Working Capital*				
TOTAL REVENUE:	\$ 5,161,435	\$ 5,172,844	\$ 5,222,818	\$ 5,222,818

*All budgets should balance indicating strong budgetary skills. Any negative fund balances will, more than likely, generate add those evaluating the application. If the applicant is depending on other funding sources or working capital to balance the oper provide documentation such as signed statements from donors, foundations, bank documents, etc., on the commitment of th 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



federal funding in year

Year 5	
\$	3,174,636
\$	1,653,600
\$	294,635
\$	99,947
\$	5,222,818

*ditional questions by
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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	\$ 95,000	\$ 95,000	1	\$ 97,850	\$ 97,850	1	\$ 100,786	\$ 100,786	1	\$ 103,809	\$ 103,809	1	\$ 106,923	\$ 106,923
Assistant Administrator	0.1667	\$ 65,000	\$ 10,836	1	\$ 66,950	\$ 66,950	1	\$ 68,959	\$ 68,959	1	\$ 71,027	\$ 71,027	1	\$ 73,158	\$ 73,158
Finance Officer		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Clerical		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Food Service Staff		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Custodians		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Transportation Staff		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Cluster Director	0.5	\$ 105,000	\$ 52,500	0.5	\$ 108,150	\$ 54,075	0.5	\$ 111,395	\$ 55,697	0.5	\$ 114,726	\$ 57,368	0.5	\$ 118,178	\$ 59,089
Center Coordinator	1.0833	\$ 28,000	\$ 30,324	2	\$ 28,840	\$ 57,680	2	\$ 29,705	\$ 59,410	2	\$ 30,596	\$ 61,193	2	\$ 31,514	\$ 63,028
Enrollment and Outreach Specialist	1	\$ 45,760	\$ 45,760	1	\$ 47,133	\$ 47,133	1	\$ 48,547	\$ 48,547	1	\$ 50,003	\$ 50,003	1	\$ 51,503	\$ 51,503
Post-secondary & Student Services Counselor	0.8333	\$ 50,000	\$ 41,665	1.667	\$ 51,500	\$ 85,851	2	\$ 53,045	\$ 106,090	2	\$ 54,636	\$ 109,273	2	\$ 56,275	\$ 112,551
Compliance Coordinator	1.0833	\$ 35,360	\$ 38,305	2	\$ 36,421	\$ 72,842	2	\$ 37,513	\$ 75,027	2	\$ 38,639	\$ 77,278	2	\$ 39,798	\$ 79,596
Total Admin and Support:	5.6663		\$ 314,390	9.167		\$ 482,380	9.5		\$ 514,515	9.5		\$ 529,951	9.5		\$ 545,849
Instructional Personnel															
Core Content Teacher(s)	5.16	\$ 48,000	\$ 247,680	10.9	\$ 49,440	\$ 538,896	12	\$ 50,923	\$ 611,078	12	\$ 52,451	\$ 629,411	12	\$ 54,024	\$ 648,293
Electives/Specialty Teacher(s)		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Exceptional Children Teacher(s)	1.5	\$ 50,000	\$ 75,000	2.833	\$ 51,500	\$ 145,900	4	\$ 53,045	\$ 212,180	4	\$ 54,636	\$ 218,545	4	\$ 56,275	\$ 225,102
Instructional Support		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Teacher Assistants		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Small Group Instruction ELA	0.8333	\$ 48,000	\$ 39,884	1.833	\$ 49,440	\$ 90,624	2	\$ 50,923	\$ 101,846	2	\$ 52,451	\$ 104,902	2	\$ 54,024	\$ 108,049
Small Group Instruction Math	0.8333	\$ 48,000	\$ 39,884	1.833	\$ 49,440	\$ 90,624	2	\$ 50,923	\$ 101,846	2	\$ 52,451	\$ 104,902	2	\$ 54,024	\$ 108,049
Small Group Instruction Science	0.75	\$ 48,000	\$ 36,000	1.75	\$ 49,440	\$ 86,520	2	\$ 50,923	\$ 101,846	2	\$ 52,451	\$ 104,902	2	\$ 54,024	\$ 108,049
Substitute Teacher	1.0833	\$ 24,960	\$ 27,039	3.08	\$ 25,709	\$ 79,183	4	\$ 26,480	\$ 105,920	4	\$ 27,274	\$ 109,098	4	\$ 28,093	\$ 112,371
0.833	\$ 47,840	\$ 39,851	2	\$ 49,275	\$ 98,550	2	\$ 50,753	\$ 101,507	2	\$ 52,276	\$ 104,552	2	\$ 53,844	\$ 107,689	
Total Instructional Personnel:	10.9923		\$ 505,538	24.229		\$ 1,130,296	28		\$ 1,336,225	28		\$ 1,376,312	28		\$ 1,417,601
Total Admin, Support and Instructional Personnel:	16.6586		\$ 819,928	33.396		\$ 1,612,676	37.5		\$ 1,850,740	37.5		\$ 1,906,262.25	37.5		\$ 1,963,450

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	5,663	\$ 7,213	\$ 40,871	9,167	\$ 7,213	\$ 66,121	9.5	\$ 7,213	\$ 68,523	9.5	\$ 7,429	\$ 70,579	9.5	\$ 7,652	\$ 72,696
Retirement Plan-NC State		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Retirement Plan-Other	5,663	\$ 1,110	\$ 6,288	9,167	\$ 1,110	\$ 10,172	9.5	\$ 1,110	\$ 10,542	9.5	\$ 1,143	\$ 10,858	9.5	\$ 1,177	\$ 11,184
Life Insurance		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Disability		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Medicare	5,663	\$ 805	\$ 4,559	9,167	\$ 805	\$ 7,375	9.5	\$ 805	\$ 7,643	9.5	\$ 829	\$ 7,872	9.5	\$ 854	\$ 8,108
Social Security	5,663	\$ 3,440	\$ 19,492	9,167	\$ 3,440	\$ 31,535	9.5	\$ 3,440	\$ 32,680	9.5	\$ 3,543	\$ 33,661	9.5	\$ 3,650	\$ 34,670
Workers' Comp	5,663	\$ 1,110	\$ 6,288	9,167	\$ 1,110	\$ 10,172	9.5	\$ 1,110	\$ 10,542	9.5	\$ 1,143	\$ 10,858	9.5	\$ 1,177	\$ 11,184
Unemployment	5,663	\$ 1,110	\$ 6,288	9,167	\$ 1,110	\$ 10,172	9.5	\$ 1,110	\$ 10,542	9.5	\$ 1,143	\$ 10,858	9.5	\$ 1,177	\$ 11,184
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Total Admin and Support Benefits:		\$ 83,785	\$ 441,805		\$ 135,548	\$ 672,923		\$ 140,472	\$ 702,445		\$ 144,686	\$ 714,809		\$ 149,027	\$ 726,856
Instructional Personnel Benefits															
Health Insurance	10,6586	\$ 6,166	\$ 65,720	24,229	\$ 6,166	\$ 149,394	28	\$ 6,166	\$ 172,645	28	\$ 6,166	\$ 172,645	28	\$ 6,166	\$ 172,645
Retirement Plan-NC State		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Retirement Plan-Other	10,6586	\$ 949	\$ 10,111	24,229	\$ 949	\$ 22,984	28	\$ 949	\$ 26,561	28	\$ 949	\$ 26,561	28	\$ 949	\$ 26,561
Social Security	10,6586	\$ 2,941	\$ 31,343	24,229	\$ 2,941	\$ 71,249	28	\$ 2,941	\$ 82,339	28	\$ 2,941	\$ 82,339	28	\$ 2,941	\$ 82,339
Disability		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Medicare	10,6586	\$ 688	\$ 7,330	24,229	\$ 688	\$ 16,663	28	\$ 688	\$ 19,257	28	\$ 688	\$ 19,257	28	\$ 688	\$ 19,257
Life Insurance		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Workers' Comp	10,6586	\$ 949	\$ 10,111	24,229	\$ 949	\$ 22,984	28	\$ 949	\$ 26,561	28	\$ 949	\$ 26,561	28	\$ 949	\$ 26,561
Unemployment	10,6586	\$ 949	\$ 10,111	24,229	\$ 949	\$ 22,984	28	\$ 949	\$ 26,561	28	\$ 949	\$ 26,561	28	\$ 949	\$ 26,561
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Total Instructional Personnel Benefits:		\$ 134,726	\$ 306,257		\$ 306,257	\$ 702,923		\$ 353,923	\$ 785,923		\$ 353,923	\$ 785,923		\$ 353,923	\$ 785,923
Total Personnel Benefits:		\$ 218,511	\$ 748,062		\$ 441,805	\$ 1,375,846		\$ 494,395	\$ 1,488,368		\$ 498,609	\$ 1,500,732		\$ 502,950	\$ 1,512,779
Total Admin & Support Personnel (Salary & Benefits):	5,663	\$ 398,175	\$ 1,038,439	9,167	\$ 33,396	\$ 2,054,481	9.5	\$ 654,987	\$ 2,345,135	9.5	\$ 674,636.97	\$ 2,404,872	9.5	\$ 694,876	\$ 2,466,400
Total Instructional Personnel (Salary & Benefits):	10,9923	\$ 640,264	\$ 1,436,553	24,229	\$ 1,436,553	\$ 2,054,481	28	\$ 1,690,148	\$ 2,345,135	28	\$ 1,730,235	\$ 2,404,872	28	\$ 1,771,524	\$ 2,466,400
TOTAL PERSONNEL:	16,6586	\$ 1,038,439	\$ 3,396	\$ 2,054,481	37.5	\$ 2,345,135	37.5	\$ 2,404,872	\$ 4,809,747	37.5	\$ 2,404,872	\$ 4,809,747	37.5	\$ 2,466,400	\$ 4,809,747

**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
Office			
Office Supplies	\$ 60,000.00	\$ 30,000.00	\$ 40,000.00
Paper			
Computers & Software	\$ 105,000.00	\$ 10,000.00	\$ 10,000.00
Communications & Telephone	\$ 10,000.00	\$ 15,000.00	\$ 15,000.00
Copier leases	\$ 5,300.00	\$ 10,600.00	\$ 10,600.00
Other			
*** Insert rows and edit text as needed. ***			
Management Company			
Contract Fees	\$ 256,143.50	\$ 517,284.40	\$ 522,281.80
Other			
*** Insert rows and edit text as needed. ***			
Professional Contract			
Legal Counsel	\$ 15,000.00	\$ 10,000.00	\$ 10,000.00
Student Accounting			
Financial			
Annual Audit	\$ 15,000.00	\$ 15,450.00	\$ 15,913.50
*** Insert rows and edit text as needed. ***			
Facilities			
Facility Lease	\$ 120,000.00	\$ 162,400.00	\$ 167,272.00
Maintenance	\$ 5,000.00	\$ 10,000.00	\$ 10,000.00
Custodial Supplies			
Custodial Contract	\$ 6,000.00	\$ 12,000.00	\$ 12,000.00
Insurance (General Liability, Property and Casualty)	\$ 29,000.00	\$ 58,000.00	\$ 58,000.00
School Furniture	\$ 80,000.00		
Leasehold Improvements	\$ 875,000.00		
Utilities			
Electric, Water, Gas	\$ 4,500.00	\$ 9,000.00	\$ 9,000.00
Internet and Phone	\$ 15,000.00	\$ 30,000.00	\$ 30,000.00
Trash	\$ 1,500.00	\$ 3,000.00	\$ 3,000.00
Other			
*** Insert rows and edit text as needed. ***			
Transportation			
Buses	\$ 5,000.00	\$ 10,000.00	\$ 10,000.00
Gas			
Oil/Tires & Maintenance			
Other			
*** Insert rows and edit text as needed. ***			

Other			
Marketing	\$ 35,000.00	\$ 15,000.00	\$ 15,000.00
Child nutrition	\$ 7,500.00	\$ 15,000.00	\$ 15,000.00
Travel	\$ 2,000.00	\$ 5,000.00	\$ 5,000.00
Staff Incentives	\$ 143,250.00	\$ 286,500.00	\$ 286,500.00
*** Insert rows and edit text as needed. ***			
Total Administrative & Support Operations:	\$ 1,795,193.50	\$ 1,224,234.40	\$ 1,244,567.30

OPERATIONS BUDGET:			
Instructional	Year 1	Year 2	Year 3
Classroom Technology			
Software	\$ 10,000.00	\$ 14,000.00	\$ 14,000.00
Instructional Technology	\$ 105,000.00	\$ 5,000.00	\$ 5,000.00
*** Insert rows and edit text as needed. ***			
Instructional Contract			
Staff Development	\$ 5,000.00	\$ 10,000.00	\$ 10,000.00
Exceptional Children Services	\$ 9,000.00	\$ 18,000.00	\$ 18,000.00
Pathways Programs			\$ 125,000.00
Books and Supplies			
Instructional Materials	\$ 130,000.00	\$ 140,000.00	\$ 140,000.00
Curriculum/Texts			
Copy Paper			
Testing Supplies			
Other Education Services	\$ 100,000.00	\$ 150,000.00	\$ 150,000.00
*** Insert rows and edit text as needed. ***			
Total Instructional Operations:	\$ 359,000.00	\$ 337,000.00	\$ 462,000.00
TOTAL OPERATIONS:	\$ 2,154,193.50	\$ 1,561,234.40	\$ 1,706,567.30

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

Year 4	Year 5
\$ 40,000.00	\$ 40,000.00
\$ 40,000.00	\$ 10,000.00
\$ 15,000.00	\$ 15,000.00
\$ 10,600.00	\$ 10,600.00
\$ 522,281.80	\$ 522,281.80
\$ 10,000.00	\$ 10,000.00
\$ 16,390.91	\$ 16,882.63
\$ 172,290.16	\$ 177,458.86
\$ 10,000.00	\$ 10,000.00
\$ 12,000.00	\$ 12,000.00
\$ 58,000.00	\$ 58,000.00
\$ 9,000.00	\$ 9,000.00
\$ 30,000.00	\$ 30,000.00
\$ 3,000.00	\$ 3,000.00
\$ 10,000.00	\$ 10,000.00

\$ 15,000.00	\$ 15,000.00
\$ 15,000.00	\$ 15,000.00
\$ 5,000.00	\$ 5,000.00
\$ 286,500.00	\$ 286,500.00
\$ 1,280,062.87	\$ 1,255,723.30

Year 4		Year 5	
\$	14,000.00	\$	14,000.00
\$	5,000.00	\$	5,000.00
\$	10,000.00	\$	10,000.00
\$	18,000.00	\$	18,000.00
\$	125,000.00	\$	125,000.00
\$	140,000.00	\$	140,000.00
\$	150,000.00	\$	150,000.00
\$	462,000.00	\$	462,000.00
\$ 1,742,062.87		\$ 1,717,723.30	

Overall Budget

SUMMARY	Logic	Year 1	Year 2	Year 3	Year 4
Total Personnel	J	\$ 1,038,438.69	\$ 2,054,481.32	\$ 2,345,135.20	\$ 2,404,871.56
Total Operations	M	\$ 2,154,193.50	\$ 1,561,234.40	\$ 1,706,567.30	\$ 1,742,062.87
Total Expenditures	N = J + M	\$ 3,192,632.19	\$ 3,615,715.72	\$ 4,051,702.50	\$ 4,146,934.43
Total Revenue	Z	\$ 5,161,435.28	\$ 5,172,844.11	\$ 5,222,817.66	\$ 5,222,817.66
Surplus / (Deficit)	= Z - N	\$ 1,968,803.09	\$ 1,557,128.39	\$ 1,171,115.16	\$ 1,075,883.23



Year 5	
\$	2,466,400.02
\$	1,717,723.30
\$	4,184,123.32
\$	5,222,817.66
\$	1,038,694.34

PIE North Carolina
Start-up (FY0) Budget

Total Salaries & Benefits (Please see Staff tab for details)	\$	218,178
Office Supplies	\$	40,000
Computers & Software (non instructional)	\$	100,000
Communications & Telephone	\$	1,000
Legal Fees	\$	20,000
Facilities Lease	\$	40,000
Marketing	\$	40,000
Software (Instructional)	\$	20,000
Instructional Technology	\$	100,000
Curriculum/Texts	\$	60,000
School Furniture - Start up years only	\$	80,000
Leasehold improvements - Start up years only	\$	875,000
<hr/>		
Total Start-up Costs	\$	1,594,178

PIE North Carolina
Start-Up Staff Listing

	Salary	Start-up Costs	Total
Cluster Director (.5)	\$ 52,500	1 years prior	52,500.00
Principal	\$ 95,000	8 Month Prior	63,333.33
ELA Credential	\$ 48,000	1 month Prior	4,000.00
Math Credential	\$ 48,000	1 month Prior	4,000.00
Science Credential	\$ 48,000	1 month Prior	4,000.00
Social Science Credential	\$ 48,000	1 month Prior	4,000.00
SPED Teacher	\$ 50,000	1 month Prior	4,166.67
Compliance Coordinator	\$ 35,360	1 month Prior	2,946.67
Center Coordinator	\$ 28,080	1 month Prior	2,340.00
Pathways Career Coordinator	\$ 45,760	8 Month Prior	30,506.67
Total Salaries			171,793.33
Total Payroll Taxes			13,743.47
Total Benefits			32,640.73
Total Start-Up Salaries & Benefits			218,177.53

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:

Beechler Tomberlin PLLC

- Date of Review: July 17, 2020

- Signature of Board Members Present (Add Signature Lines as Needed):

• <u>Linda P. Thomas</u>	• <u>Halklee Jenson</u>
• <u>N/A</u>	• <u>Jana Gibbs</u>
• <u>Queen Thompson</u>	• <u>Palma M Wright</u>
• <u>Jane A. White Jr.</u>	• _____

- ❖ 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: TBD

- Date of Review: July 17, 2020

- Signature of Board Members Present (Add Signature Lines as Needed):

• <u>Linda P. Thomas</u>	• <u>Halklee Jenson</u>
• <u>N/A</u>	• <u>Jana Gibbs</u>
• <u>Queen Thompson</u>	• <u>Palma M Wright</u>
• <u>Jane A. White Jr.</u>	• _____

- ❖ If contracting with a CMO/EMO, that the selected management company has reviewed with the full Board of Directors, listed within the application, all the items required and the associated management contract and operations.

- Name of the Contact for Selected EMO/CMO:

Kristi Duenas

- Date of Review: July 17, 2020

- Signature of Board Members Present (Add Signature Lines as Needed):

- Linda P. Thomas
- Allen
- Queen Thompson
- James H. Willes Jr.
- Darlene Jordan
- Jana Sibbs
- Patrice M Wright
- _____

- ❖ 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:

Kristi Duenas

- Name of the Selected Financial Service Provider:

Pathways Management Group, Inc.

- Date of Review: July 17, 2020

- Signature of Board Members Present (Add Signature Lines as Needed):

- Linda P. Thomas
- Allen
- Queen Thompson
- James H. Willes Jr.
- Darlene Jordan
- Jana Sibbs
- Patrice M Wright
- _____

❖ 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:
TBD
- Name of the Selected PowerSchool Service Provider:
TBD
- Date of Review: _____
- Signature of Board Members Present (Add Signature Lines as Needed):

- Linda P. Thomas
- ALW
- Juan Thompson
- James A. Wilkes, Jr.
- Hatler Jensen
- Jane Sibbs
- Patrice M. Wright
- _____

Certification

I, James Wilkes, as Board Chair, certify that each Board Member has reviewed and participated in the selection of the individuals and vendors attached to this document as evidenced by the full Board of Director signatures outlined above. The information I am providing to the North Carolina State Board of Education as Pathways In Education - North Carolina Charter School is true and correct in every respect.

James A. Wilkes, Jr. 7-17-20
Signature Date



Public Schools of North Carolina
State Board of Education
Department of Public Instruction

Signature Page

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

Print/Type Name: James H. Wilkes, Sr.

Board Position: Chair

Signature: *James H. Wilkes, Sr.*

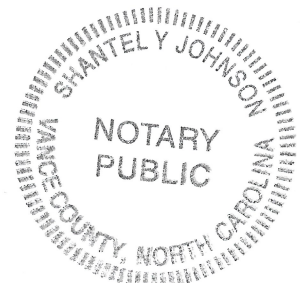
Date: 7-22-20

Sworn to and subscribed before me this 22nd day of July, 2020.

Notary Public: *Shantel Y. Johnson*

Official Seal:

My commission expires: October 27, 2020.





Pathways In Education–North Carolina Charter School Board of Directors will recruit and hire the School Leader upon approval of charter.

Position

School Leader
Principal/ Lead Administrator
Assistant Principal/ Assistant Administrator
Center Coordinator
Enrollment and Outreach Specialist
Post-secondary & Student Services Counselor
Compliance Coordinator
Core Classroom Teachers
Exceptional Children's Teacher
Small Group Instruction (ELA, Math, Science)
Substitute Teachers

<u>Year 0</u>	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Year 4</u>
-	.5	.5	.5	.5
-	1	1	1	1
-	0.16	1	1	-
-	1.083	2	2	2
-	1	1	1	1
-	0.833	1.67	2	2
-	1.083	2	2	2
-	5.16	10.9	12	12
-	1.5	2.83	4	4
-	2.41	5.46	6	6
-	0.83	2	2	2

Year 5

.5
1
-
2
1
2
2
12
4
6
2

Area of Proposed Coverage

Comprehensive General Liability
Officers and Directors/Errors and Omissions
Property Insurance
Automobile Liability
Crime Coverage - Minimum/Maximum Amount
Worker's Compensation
Other Coverage
Total Cost

Proposed Amount of Coverage

\$1,000,000.00/occurrence
\$1,000,000.00/occurrence
\$1,000,000.00/occurrence
\$250,000.00 \$250,000.00
\$500,000.00

Cost (Quote)

\$1,788
\$400 (approx.)
\$1,600 (approx.)
\$96 (Hired & Non-Owned Auto Only)
\$483
\$3,150 (approx.)
\$963
\$8,245

Board Member Name

Tara Gibbs
Patrice McClean
Kathleen Hoskin Tunson
Linda Thomas
Queen Thompson
Alvin Wallace
Rev. James Wilkes

Board Title

Board Member
Board Member
Board Member
Board Member
Board Member
Board Member
Board Chair

County of Residence

Mecklenburg

Mecklenburg

Mecklenburg

Mecklenburg

Mecklenburg

Mecklenburg

Mecklenburg

Current Occupation

Mecklenburg Director of Christian Education, Reeder Memorial Baptist Church (Ordained Minister)

Mecklenburg Career Development Coordinator, Independence High School

Xylem Inc./Spectraforce, Communications Manager/Project Manager

Lead Teacher and Professional Development Master Teacher, CMS

Mecklenburg Social Worker, CMS (Retired); former Chair of Charlotte Branch NAACP Legal Redress Committee

Wells Fargo Business Support Associate within the Wells Fargo Advisors group in Charlotte

Guilford Senior Pastor Elon First Baptist Church (Ordained Minister)

Past or Present Professional Licenses Held

Ordained Minister

Professional Educator's License

Series 6 and Series 63 Lincses

Professional Educator's License

Master Social Worker license

Ordained Minister

Any disciplinary action taken against any of these professional licenses?

No

No

No

No

No

No

No