



INVEST  
COLLEGIATE

*"First comes thought; then organization of that thought, into ideas and plans;  
then transformation of those plans into reality.  
The beginning, as you will observe, is in your imagination." – Napoleon Hill*

INVEST COLLEGIATE Consortium, Inc.  
Post Office Box 1202  
Davidson, North Carolina 28036

Charter School Application:  
April 12, 2012

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

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

# APPLICATION COVER PAGES

NAME OF PROPOSED CHARTER SCHOOL: INVEST COLLEGIATE

NAME OF NONPROFIT ORGANIZATION/MUNICIPALITY UNDER WHICH CHARTER WILL BE ORGANIZED OR OPERATED: INVEST COLLEGIATE CONSORTIUM, INC.

HAS THE ORGANIZATION APPLIED FOR 501(c)(3) NON-PROFIT STATUS: Yes  No

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

NAME OF CONTACT PERSON: Kate Alice Dunaway

TITLE/RELATIONSHIP TO NONPROFIT: INVEST COLLEGIATE Board Member

MAILING ADDRESS: P.O. Box 1202, Davidson, North Carolina 28036

PRIMARY TELEPHONE: 704-880-8353

ALTERNATE TELEPHONE: 704-928-5315

E-MAIL ADDRESS: kadunawayic@gmail.com

Location Proposed Charter School (LEA): Charlotte-Mecklenburg Schools

**Conversion:**

No:

Yes:  If so, Public  or Private:

If a private school, give the name of the school being converted:

If a public school, give the name and six-digit identifier of the school being converted: \_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_

Description of Targeted Population:

INVEST COLLEGIATE will target students and families seeking a K-12 educational community which extends the NC Standard Course of Study and Common Core Standards via Core Knowledge, Fine Arts and Honors/Advanced Placement courses in Grades 9-12. INVEST COLLEGIATE will actively seek an ethnically and economically diverse student population from the metro-Charlotte region. A focus on academic excellence in preparation for entering a college or university will permeate the INVEST COLLEGIATE community.

**Proposed Grades Served:** K-6, Year: 2013. One (1) Grade added per year through Grade 12, Year: 2019.

**Proposed Total Enrollment:** 558 students, 2013.

**Projected School Opening Year 2013 Month July**

| School Year | Grade Levels       | Total Projected Student Enrollment | Year Round |    |
|-------------|--------------------|------------------------------------|------------|----|
|             |                    |                                    | YES        | NO |
| First Year  | K through Grade 6  | 558                                | X          |    |
| Second Year | K through Grade 7  | 660                                | X          |    |
| Third Year  | K through Grade 8  | 792                                | X          |    |
| Fourth Year | K through Grade 9  | 950                                | X          |    |
| Fifth Year  | K through Grade 10 | 1,140                              | X          |    |
|             |                    |                                    |            |    |
|             |                    |                                    |            |    |
|             |                    |                                    |            |    |
|             |                    |                                    |            |    |

I certify that I have the authority to submit this application and that I was regularly involved in the development of this application. All information contained herein is complete and accurate, realizing that any misrepresentation could result in disqualification from the application process or revocation after award. I understand that incomplete applications will not be considered. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the applicant.

  
 Signature

Dr. Antoinette Crawford Ellison  
 Printed Name

INVEST COLLEGIATE Board of Directors, Chair  
 Title

Wednesday, April 11, 2012  
 Date

## II. TABLE OF CONTENTS FOR THE APPLICATION

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### III. MISSION, PURPOSES and EDUCATIONAL FOCUS *(G.S.115C-238.29A)*

#### MISSION:

The mission of the proposed charter school is as follows:

At INVEST COLLEGIATE, we imagine, we nurture, we value, we engage, we sustain, we transform as we champion opportunities in leadership and learning – embracing greatness, inspiring achievement within a telescopic environment.

#### EVIDENCE FOR NEED OF THE PROPOSED SCHOOL:

Describe the community relationships forged in the preparation of the charter application. Provide information detailing how the community and parents have been involved in the formation of the proposed mission statement. Evidence of surveys, dates, times, and locations of public meetings discussing this proposed charter school can be used to demonstrate the level of public interest.

Charlotte-Mecklenburg Schools (CMS) is the local educational agency for Mecklenburg County. CMS serves more than 141,100 students in Kindergarten through Grade 12 in 159 schools throughout the cities and towns of Mecklenburg County. CMS serves a diverse population of students who represent 168 countries and 165 native languages. Students also represent a variety of academic needs. There are 15,505 students identified as Limited English Proficient and 2,529 students who receive Exceptional Children Services in a self-contained setting. Fifty-three percent of the students are considered to be economically disadvantaged.

INVEST COLLEGIATE is committed to meeting the diverse needs of students in a unique educational setting. The students at INVEST COLLEGIATE will represent the student population in the Charlotte-Mecklenburg Schools. While CMS serves a diverse population of students, it does so in a largely segregated manner. INVEST COLLEGIATE will offer a unique opportunity for a diverse group of students to learn shoulder to shoulder within the classroom. INVEST COLLEGIATE intends to serve upper and middle class families who are employed in the Charlotte Metro area as well as economically disadvantaged students who live within walking distance of the school.

INVEST COLLEGIATE was approached by a small group of community members which included architects, educators, developers, and business leaders desiring the opportunity to bring a public charter school to a metro-Charlotte community. Beginning in October 2011, our conversations with these individuals led to locating in a community seeking a diverse and exemplary public school in a historic building previously utilized as a public neighborhood school.

The targeted location of INVEST COLLEGIATE is in the heart of the historic Wilmore community. The Wilmore neighborhood is located in the center of the East Boulevard, West Boulevard, South Boulevard corridor. It is minutes from uptown Charlotte and I-77 which provides direct access to North Charlotte, Lake Norman communities and the South Charlotte area. Additionally, South Boulevard borders the Wilmore community providing direct access to metro-Charlotte, South Charlotte, Pineville and Weddington. The beauty of the location is that it is in the heart of the city with adjacent routes to popular suburban areas.

Historic Wilmore is one of Charlotte's up-and-coming neighborhoods. Filled with charming bungalows from the '20s and '30s, this neighborhood has the style of Dilworth but with slightly more affordable pricing. It is no wonder why this neighborhood is one of the fastest growing in metro-

Charlotte with the amazing downtown skyline views visible from almost every street. South End is booming with apartments and mid-rise condo construction. Perhaps the community's greatest asset is the convenience. Wilmore is within walking distance of the South End Trolley Line and Charlotte's Light Rail line, trendy shops and restaurants.

Locating INVEST COLLEGIATE in the heart of the Historic Wilmore neighborhood will provide educational opportunities for new residents as well as residents who have historic ties to the community. Having a neighborhood school in the Wilmore community will provide a diverse population of students and a unique opportunity for families in Charlotte.

INVEST COLLEGIATE provides a twenty-first century educational environment for children and families through delivery of an exemplary academic program. The potential for partnership within the community, including North Carolina Community Colleges, amplifies community resources and builds a foundation for student success. While North Carolina public schools continue progress toward state and national education goals, the opportunity to accelerate progress for a diverse community within a global environment remains elusive. Invest Collegiate is committed to locating within communities where students and families will benefit from greater educational opportunity within the public sector.

#### **GOALS FOR THE PROPOSED CHARTER SCHOOL:**

A description of the student achievement goals for the school's educational program and the method of demonstrating that students have attained the skills and knowledge specified for those goals. These goals should include specific and measurable performance objectives over time. A timeline should be included to highlight how the school proposes to meet its objectives.

#### **Student Achievement Goals**

Specific student achievement goals, ABC Composite Score/s, will be determined by INVEST COLLEGIATE faculty for Grades K-6 prior to the beginning of the 2013-2014 school year. Through informed conversation and collaboration, the faculty will designate an achievement *target goal and a champion goal* for their areas of responsibility, each grade or subject level, and the school (composite score). Beginning with 2013-2014, INVEST COLLEGIATE will strive to meet and/or exceed annual growth rates as set by North Carolina DPI and those which may be required for Adequate Yearly Progress. INVEST COLLEGIATE's goal is to meet and/or exceed district (LEA), state, and or national averages.

To meet and/or exceed the target and champion goals, INVEST COLLEGIATE will adhere to the following goals as outlined in our mission and curriculum:

#### **Mission Specific Goals**

At INVEST COLLEGIATE, all students will:

- study Spanish in Grades K-12 in year round courses of study.
- receive instruction in the Fine Arts including Visual Arts, Choral, Music, Band, and Theatre.
- participate in Physical Education and movement in Grades K-12 in year round courses of study.

- Participate in community service learning with thirty-two (32) hours accumulated in Grades 9-12 (a minimum of 8 per year) to graduate from INVEST COLLEGIATE.
- engage in leadership opportunities within the school and greater community.
- attend two (2) cultural or civic events, from a selection of offerings outlined and approved by school leadership, each academic year beginning in Grade 7. A minimum of two (2) per year for a total of eight (8) accumulated in Grades 9- 12 are required to graduate from INVEST COLLEGIATE.
- will enroll in Honors and/or Advanced Placement courses in Grades 9-12 to further opportunities in college and university programs.

### PURPOSES OF PROPOSED CHARTER SCHOOL:

State the relationship between the six legislated purposes, as specifically addressed in the NC charter school statute GS 115C-238.29A, and the proposed school's operations.

#### 1-2) Improve student learning and increase opportunities for all students

INVEST COLLEGIATE will provide an educational environment which prepares all students to enter a college or university of their choice upon completion of their K-12 educational program. The mission of INVEST COLLEGIATE will be evident and tangible throughout the K-12 program which will include the Core Knowledge curriculum (E. D. Hirsch) in Grades K-8; Saxon Reading and Math curriculum in Grades K-5; Honors and Advanced Placement Courses of Study in Grades 9 – 12; collaboration with the local community college to extend course offerings in Grades 11 and 12; and an educational program which exceeds the current (2011-2012) North Carolina Graduation requirements and National Common Core Standards.

#### 3) Encourage the use of different and innovative teaching methods.

INVEST COLLEGIATE recognizes the relationship between a classroom teacher and a student's success. Exemplary teachers with innovative strategies will be recruited and celebrated as INVEST COLLEGIATE champions educational opportunities for all students and faculty within the school community. Faculty members will be expected to utilize innovative methods within the framework of the INVEST COLLEGIATE community. Varied instructional methodologies will be supported through collaboration across the school community; within the collegiate consortium framework; and through participation in local, state, and national conferences, in-service; and pursuit of advanced degrees and certifications. All faculty will participate in two weeks of professional development each academic year with training in Leadership Development (The Leader in Me, Covey, S. R.); Core Knowledge Curriculum (Hirsch, E. D.); technology; Marzano strategies; current brain research and multiple intelligences.

#### 4) New professional opportunities and learning program ownership/accountability

INVEST COLLEGIATE provides an opportunity for creative collaboration within the school community and across a consortium of charter schools with the same mission and vision for educational excellence. Exemplary leadership, acknowledging faculty as leaders within the school community, provides the framework for educational success. Faculty are expected to demonstrate leadership within their own classrooms and areas of expertise and throughout the greater school community. As such, INVEST

COLLEGIATE will recruit faculty that embrace the INVEST COLLEGIATE mission, demonstrate the on-going pursuit of learning and a commitment to teaching excellence. As such, faculty must meet or exceed the following qualifications of the INVEST COLLEGIATE application *prior to an interview and for consideration of employment at INVEST COLLEGIATE*:

- a sealed college/university transcript indicating a cumulative GPA of 3.0 or higher,
- a clear Criminal Background Investigation Check,
- three letters of reference documenting leadership, community service, and/or exemplary service within a community (educational or other),
- demonstration of superior writing skills through submission of three essays,
- teaching portfolio with sample units, daily lesson plans, technology plans, and correspondence with students and families, and
- photographs and/or videos of their classroom and/or teaching methods/strategies.

INVEST COLLEGIATE acknowledges educators as professionals through on-going professional development, purposeful rigor, and expectations for continued professional and personal growth. INVEST COLLEGIATE will empower (The Empowerment of Teachers: Overcoming the Crisis of Confidence, Maeroff, G.) faculty to create an exemplary learning environment for all students.

#### 5) Provide parents and students with expanded educational choices

INVEST COLLEGIATE will be located within one (1) mile of Uptown Charlotte and three (3) miles of Central Piedmont Community College convenient to the Brookshire Freeway (beltway); the Charlotte business sector; Greenway; and CATS transportation. The school will serve children and families who are seeking diverse and exemplary educational opportunities within the public sector. The school facility will be located within a historic community that continues to see overcrowding in schools with multiple modular units, on-going redistricting, and limited availability for CMS schools of choice. While CMS provides choice options within the traditional LEA framework, the options do not begin to meet the requests from parents. After exhausting choice options, parents find their child assigned to a school. The CMS district serves over 120,000 students and the number is projected to grow over 50,000 within the next ten years. The schools are over capacity as student population grows and school facilities are consolidated. INVEST COLLEGIATE, located in the heart of business, cultural communities, and the

Historic Wilmore community will afford parents a premier location while providing students immediate access to community opportunities as an integral component of the INVEST COLLEGIATE experience.

#### 6) Measurable accountability standards

INVEST COLLEGIATE will follow the testing program as set forth in the North Carolina ABC's Accountability program including all required state and national testing according to updates and changes due to legislation. Within three (3) years, INVEST COLLEGIATE will meet or exceed student performance standards in comparison with comparable district counterparts.



### **EDUCATIONAL FOCUS:**

Describe briefly, limited to one page, the focus of the proposed charter school. This description will be used in public releases of information to interested parties, such as: the media, the State Board of Education, parents, school systems, and in various documents produced by the Office of Charter Schools. It must be concise and relate directly to the mission of the school.

At INVEST COLLEGIATE, we imagine, we nurture, we value, we engage, we sustain, we transform; as we champion opportunities for leadership and learning - embracing greatness, inspiring achievement within a telescopic environment. INVEST COLLEGIATE provides a K-12 comprehensive educational program for college-bound students whose families desire an exemplary educational community. By investing in students and faculty, the entire school community builds upon the collaboration across six *active domains of learning*: imagine, nurture, value, engage, sustain, and transform. As the entire school community demonstrates these active domains, leadership and learning are tangible and visible individually and collectively.

At INVEST COLLEGIATE, students will engage in the following educational curriculum and programs:

- K-8 Core Knowledge curriculum;
- K-12 Spanish curriculum;
- K-12 Physical Education, Movement, and Healthy Living curriculum;
- K-12 Community Service Learning;
- K-12 Fine Arts Curriculum;
- 9-12 Honors, Advanced Placement, and Community College curriculum; and
- K-12 Leadership program.

INVEST COLLEGIATE at Wilmore will showcase TRANSFORM as an active domain throughout the school and community. The TRANSFORM domain will be evident in the renovation of the historic school facility; permeation of the educational culture throughout the community; the utilization of technology; the fabric of the INVEST COLLEGIATE culture; and student and faculty leadership. INVEST COLLEGIATE strives to inspire children to realize their full potential as contributing community members through recognizing, writing, verbalizing, and sharing their present and future goals. At INVEST COLLEGIATE, we gaze through a telescopic lens – understanding and embracing our own responsibility in achieving our individual and collective future.

## **IV. GOVERNANCE**

**NOTE:** Please answer all sections completely. Do not use “same as LEA” or “whatever the law states”. Lack of proper documentation will jeopardize the application review.

### **PRIVATE NONPROFIT CORPORATION (G.S.115C-238.29E)**

The nonprofit corporation must be officially authorized by the NC Secretary of State by the final approval interview date.

Name of Private Nonprofit: INVEST COLLEGIATE CONSORTIUM, INC.

Mailing Address: P.O. Box 1202

City/State/Zip: Davidson, North Carolina 28036

Street Address: 110 Poppy Field Lane, Mooresville, North Carolina 28115

Phone: 704-880-8353

Fax: n/a

Name of registered agent and address: Kari Jolly, 110 Poppy Field Lane, Mooresville, NC 28115

FEDERAL TAX ID: 45-3776803

**TAX-EXEMPT STATUS (501 (c)(3))** *(G.S.115C-238.29B(b)(3))*

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

- Yes (copy of letter from federal government attached)  
 No

**NOTE:** 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. *(G.S.115C-238.29E(b))*

INVEST COLLEGIATE acknowledges that the tax-exempt status must be obtained from the Internal Revenue Service within twenty-four (24) months of the date the Charter Application receives final approval. INVEST COLLEGIATE will meet this requirement.

**PROPOSED EDUCATIONAL MANAGEMENT ORGANIZATION (EMO OR CMO)**

If the Charter School plans to contract for services with an "educational management organization" or "charter support organization," please specify the name of the company, address, website, phone number, contact person, fax, and email:

At the writing of this charter application, the INVEST COLLEGIATE Board of Directors **does not** have a contract with any EMO or CMO.

INVEST COLLEGIATE plans to contract with Acadia-NorthStar, Raleigh, North Carolina to provide Financial and Student Information Services.

- Please include a copy of the proposed management agreement of the specified EMO and explain how the contract will be in the best educational and financial interests of the charter school. n/a
- What other EMO/CMOs were pursued and why did the applicant select this particular one? Please include information regarding other management fees and financial/academic records that led to the selection of the proposed EMO/CMO as the best fit for this proposed school. n/a

- Provide and discuss performance and financial data from other schools managed by the management company to demonstrate how this organization is a good fit for the proposed population of students n/a
- 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. An organizational chart showing the lines of authority should be included. n/a
- 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. n/a

**ORGANIZATIONAL STRUCTURE OF PRIVATE NONPROFIT:** (GS 115C-238.29B(b)(3); GS 115C-238.29E(d))

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

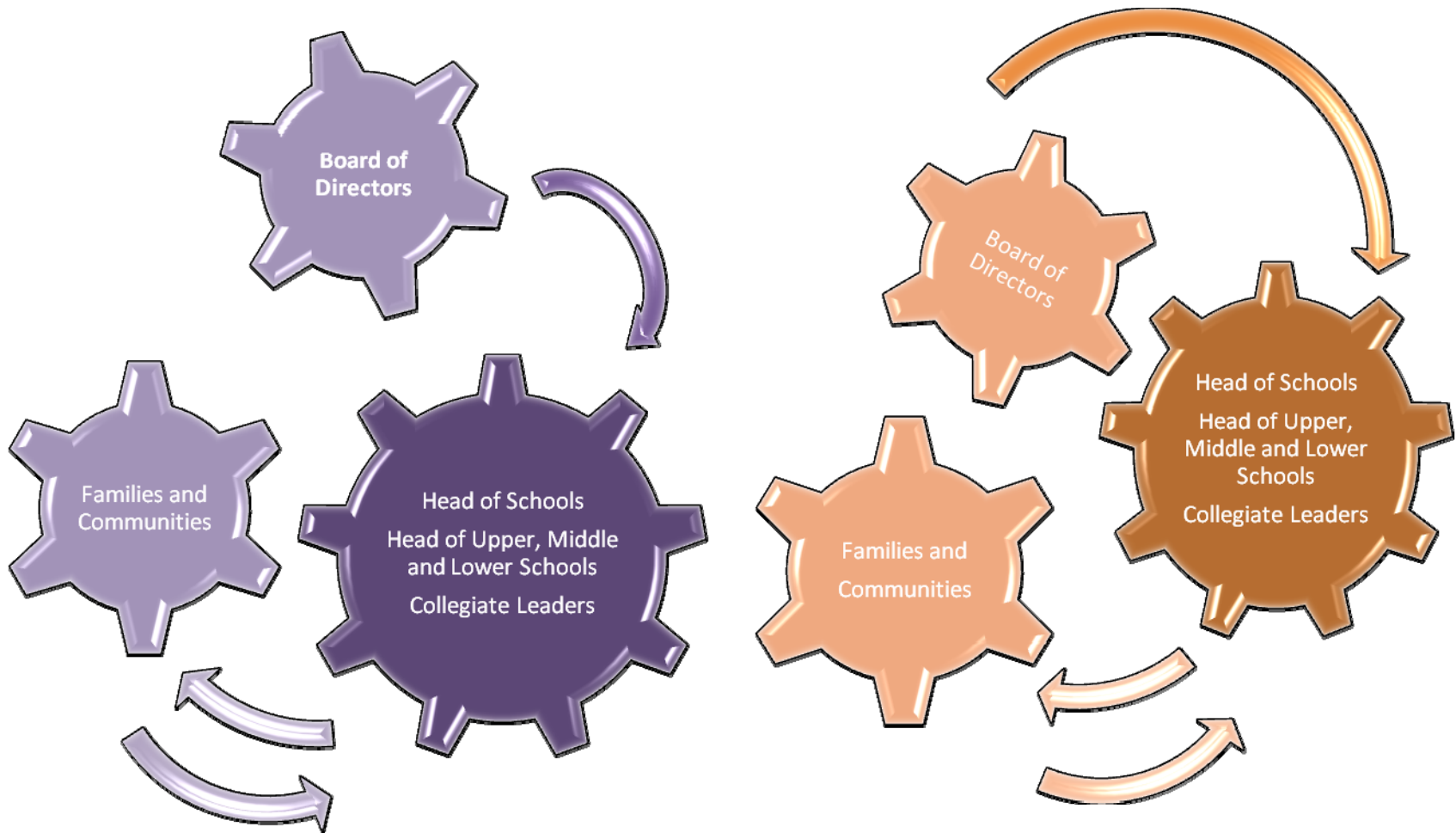
**Please provide the following in this location of the APPLICATION: (Do not include as an appendices.)**

- A well-defined organizational chart showing the relationship of the Board of Directors to the parents and staff of the proposed charter school as well as any advisory council. This chart should also include lines of authority to and from any outside entity that will play a role in managing the charter school.

INVEST COLLEGIATE's mission set forth in the application for INVEST COLLEGIATE, located within the Wilmore community of metro-Charlotte, is the first in a proposed six member school consortium across a broad and diverse regional landscape. Each school will embrace one of the six active domains expressed in the INVEST COLLEGIATE mission: *Imagine, Nurture, Value, Engage, Sustain, and Transform*. Each school will develop strength, leadership and active participation within their identified domain which will be shared throughout the INVEST COLLEGIATE school's model to provide exemplary educational and community opportunities for students, faculty, and families.

*The following organizational structure, noted in purple, represents INVEST COLLEGIATE at Wilmore: TRANSFORM.* The organizational structure, noted in light orange, represents another proposed school in the INVEST COLLEGIATE model in a future charter school application.

**See Following Page for Organizational Structure**



- Each founding board member must submit, in this section of the application, a one-page resume highlighting his or her experiences over the past ten or more years.

Please note the resumes for the INVEST COLLEGIATE Board of Directors as follows:

Carey Cannon, Kate Alice Dunaway, Dr. Antoinette Ellison, Kari Jolly, and Katie Lauren Moske

## Carey Joseph Cannon

216 Port Royal Drive  
Matthews, North Carolina 28105  
704-366-4030 x122 (office) / 704-560-8400 (cell)  
[ccannon@providencecbc.org](mailto:ccannon@providencecbc.org)

### **EXPERIENCE**

#### **Providence Baptist Church, Minister of Music**

August 2004-Present

Charlotte, North Carolina

Plans and directs music for all worship services and provides for various ministerial needs  
Prepares Sanctuary Choir, High School Choir, Middle School Choir and two ensembles  
Oversees a ministry involving 400 participants, including choirs from age three to senior adult  
Manages music ministry budget and supervises Music Associate/Organist, Administrative Assistant, Contemporary Worship leader and Children's Choir Coordinator  
Plans and implements choir retreats and national/international tours for Adult and Youth Choirs

#### **Charlotte Children's Choir, Associate Conductor**

August 2008-Present

- Direct *Cantare*, an all-male changed voice chorus and co-director *The Youth Chorale*
- Prepares seasonal concerts and annually participates in the NCACDA Male-Vocal-Arts-Symposium

#### **University of North Carolina Charlotte, Adjunct Professor**

Fall 2010-Present

- Direct the Mallard Creek Chorale, an all-male collegiate chorus

#### **United States Army Chorus, Member**

October 2000-August 2004

Washington, D.C.

A professional male vocal ensemble that performs in the Washington D.C. area, as well as around the nation.

- Regular White House performances and state funerals
- Performances for visiting Dignitaries, and Heads of State
- Announcer for the US Army Chorus
- Musical research and public relations
- Bass soloist for the US Army Chorus
- Conducted Army Chorus works by Randol Bass and Francis Poulenc

### **LEADERSHIP INITIATIVES**

**American Choral Directors Association Repertoire and Standards Chair for NC** (Spring 2011 – Present)

**American Choral Directors Association Male Vocal Arts Symposium Director** (Fall 2010, 2011)

**Choristers Guild Chairman of Regional Conference** (Fall 2008)

**Carolinas Concert Association Board Member** (Fall 2004-Spring 2006)

### **EDUCATION**

**University of North Carolina Greensboro**, Greensboro, North Carolina

Doctorate of Music in Arts: Choral Conducting; completed in August, 2012

**George Mason University**, Fairfax, Virginia

Master of Arts in Music: Choral Conducting; December, 2003

Master of Arts in Music: Vocal Performance; December, 2003

**Furman University**, Greenville, South Carolina

Bachelor of Arts: Communications; May, 2000

## Kate Alice Dunaway

149 Sailview Road  
Mooresville, North Carolina 28117  
Voice: 704-880-8353  
[kadunawayic@gmail.com](mailto:kadunawayic@gmail.com)

### Education

The University of New Mexico, Albuquerque

Educational Leadership

Doctoral Program (ABD)

Successful completion of Doctoral Written and Oral Examinations

- Completion of Doctoral Research  
Comanche Elementary School/Albuquerque Public Schools

Emory University, Atlanta

Master of Arts/Educational Administration and Supervision

- Awarded Full Academic Scholarship by Emory Graduate School,  
Department of Education

Furman University, Greenville, South Carolina

Bachelor of Arts/Elementary Education

- Recipient of Kappa Delta Epsilon Award, Recognizes one Senior Education Major for  
Outstanding Achievement in Student Teaching, Dean's List

### Professional Experience

Pine Lake Preparatory, Mooresville, North Carolina

**North Carolina's largest charter school, 1600+ students, K-12, NC Honor School of Excellence**

Head of School

2007-August 2011

Founder/Founding Board Member

2005-2007

- Created name, mission statement, core values, and generated information necessary for Pine Lake Preparatory's application to the SBE, 2005-2006
- Created and maintained positive relationships with numerous corporate community members for the benefit of students, Academic Partners, and the school community
- Recruited 115+ teachers and support personnel from 2007-2008 for expansion of Pine Lake Preparatory from 260+ students (2007-2008) to 1300+ students (2008-2009)
- Participated as an active member of the Kaleidoscope Foundation Capital Campaign with pledges in excess of 1.1 million, 2009-2011 for the benefit of Pine Lake Preparatory
- Facilitated purchase of 20+ million dollar campus with tax exempt bonds per ARRA and NC Local Government Commission, December 2010

American Renaissance Charter School, Statesville, North Carolina

Principal

1998-2003

Founder/Founding Board Member

1997-1998

- Submitted Grant to National Board for Professional Teaching Standards  
One (1) Elementary School Recipient in United States: Received \$85,000.00
- Initiated participation in Kellogg's Grant: Received \$7,000.00
- Presented enrollment increases to CSAC and State Board from 1999 – 2002  
Enrollment increased from 112-400+
- ABC Testing: School of Distinction (2003)
- Submitted and Received approval for Charter School Renewal (2002-2003)

American Renaissance Middle School, Statesville

1998 - 1999

Founder/Founding Board Member

### Professional Honors and Awards

Volunteer Award, Iredell/Statesville Schools

Georgia Finalist, NASA Teacher in Space Program

Gwinnett County Teacher of the Year, R. D. Head Elementary, Hopkins Elementary

## Antoinette Crawford Ellison

3502 Commonwealth Avenue  
Charlotte, North Carolina 28205  
Voice: 704-773-8390  
[Antoinette\\_ellison@yahoo.com](mailto:Antoinette_ellison@yahoo.com)

### EDUCATION

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**University of North Carolina at Charlotte-** Charlotte, NC

*Doctorate Degree in Educational Leadership; December 2009*

**University of North Carolina at Charlotte-** Charlotte, NC

*Master of Arts in Curriculum and Supervision; December 2002*

**Campbell University-** Buies Creek, NC

*Master of Arts in Counseling; May 1997*

**Campbell University-** Buies Creek, NC

*Bachelor of Arts in History, Minors in Government and Education; May 1994*

### EXPERIENCE

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**Charlotte Mecklenburg Schools - Eastway Middle School,** Charlotte, NC

*Academic Facilitator; July 2008 – present*

- Facilitate planning meetings for core subjects and electives helping teachers to develop rigorous, engaging lessons that are data driven
- Conduct formal and informal observations, hold conferences, provide feedback and help teachers to set and reach instructional goals
- Implement comprehensive assessment program while serving as accountability Coordinator

**Charlotte Mecklenburg Schools - Hidden Valley Elementary,** Charlotte, NC

*Math/Academic Facilitator; August 1999 – June 2008*

- Facilitated planning meetings for core subjects and electives helping teachers to develop rigorous, engaging lessons that were data driven
- Conducted formal and informal observations, held conferences, provided feedback and helped teachers to set and reach instructional goals
- Served as Accountability Coordinator implementing a comprehensive assessment program

**Charter Pines Behavioral Health System,** Charlotte, NC

*Counselor/Teacher; May 1997 – August 1999*

- Developed and implemented lesson plans for day treatment students in grades K–12.
- Assisted students with smooth transitions from their home school into the day treatment program and back into public school

**Dorchester Alcohol and Drug Commission,** Summerville, SC

*Prevention Specialist; December 1996 – May 1997*

- Counseled at risk elementary, middle and high school students
- Developed prevention programs and leadership programs for Dorchester County public schools

**Harnett County Public Schools - Triton High School,** Erwin, NC

*Teacher; August 1994 – June 1996*

- Created and implemented U.S. History and Civics lesson plans
- Conducted quarterly parent-teacher conferences
- Nominated for Teacher of the Year

### CERTIFICATIONS

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North Carolina Teaching Certificate Elementary Education K – 8

North Carolina Teaching Certificate Social Studies 9 – 12

North Carolina Teaching Certificate Curriculum and Supervision



**Kari Beckwith Jolly**  
110 Poppy Field Lane  
Mooreville, North Carolina 28115  
Voice: 704-928-5315  
[jollyhousenc@yahoo.com](mailto:jollyhousenc@yahoo.com)

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## Education

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*Queens University, Charlotte, NC*

### **B.A. American Studies**

Current Undergraduate Student: GPA 3.78

*American Institute for Paralegal Studies, Charlotte, NC*

### **Paralegal/Legal Assistant Certificate of Completion**

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## Employment Experience

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*Pine Lake Preparatory, Mooresville, NC*

#### **Campus Services Director**

Developed, implemented and managed protocol for physical plant operations and human resources for a charter school serving 1475 students; facilities consisted of 22 acres and 88,000 square feet of academic and administration space. Provided fiscal oversight in partnership with school leadership and contracted third parties.

Extended Day Program Director

Successfully launched newly developed Extended Day Program for working families with children in Grades Kindergarten through Fifth; currently serving 47 students and three teachers.

*Pope McMillan Kutteh Privette Edwards & Schieck, P.A., Statesville, NC*

#### **Corporate Paralegal**

Drafted corporate organizational and maintenance documents, employment agreements, leases, financing security agreements; responsible for daily client correspondence and case management for Iredell County General Counsel.

*Larry S. Hartley, P.A., Charlotte, NC*

#### **Bankruptcy Paralegal**

Casework involved Chapter 7 and Chapter 13 administration and estate planning; duties included case management, drafting of court documents and other correspondence.

*Templeton & Raynor, P.A., Charlotte, NC*

#### **Corporate Paralegal**

Drafted corporate organizational and maintenance documents, employment agreements, leases, financing security agreements; casework involved Chapter 7 and Chapter 13 administration, estate planning/administration; duties included case management, drafting of court documents and other correspondence.

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## Related Skills/Volunteerism

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*North Carolina Secretary of State*

Currently appointed Notary Public

**Glynwater Homeowners Association**

Founding Director and Officer

**American Renaissance Association of Parents**

Past Director and Officer

## **Katie Lauren Moske**

3207 Eastover Ridge Drive Apt. 536  
Charlotte, North Carolina 28211  
Voice: 704.604.8061  
[klmoske@gmail.com](mailto:klmoske@gmail.com)

### **EDUCATION**

**College of Charleston** 2006-2010  
Honors College; Distinguished Honors; Communication Major, Political Science Minor

**University of North Carolina at Charlotte** 2010-present  
Graduate Certification in Teaching, Middle Grades English Language Arts

### **WORK EXPERIENCE**

**Teach for America Corps 2010** 2010-present  
**Eastway Middle School, 8<sup>th</sup> grade Language Arts**  
-Book Club, Talent Development Program

**College of Charleston Residential Life and Housing** 2009-2010  
**Resident Assistant, McAlister Hall**  
Responsibilities include programming, decorating bulletin boards and flyers, handling residential issues, and providing the students with a safe, positive learning and living environment.

**Senator Lindsey Graham** Fall 2008  
**Fellow, South Carolina Honors Semester in Washington Program**  
-Responsibilities included managing constituent mail and phone calls, giving tours of the Capitol, assisting the Legislative Aides in correspondence mail, and writing floor speeches for the Senator

**Honors College**  
**Administrative Assistant, Honors Center** Fall 2007-2010  
- Responsibilities include communicating with parents and prospective students, keeping track of applications, and informing Honors students about events and opportunities

### **LEADERSHIP EXPERIENCE**

**Teach for America Professional Learning Leader** Summer 2011-present  
-Leads 8<sup>th</sup> grade ELA teachers in collaboration, lesson planning and data analysis

**CofC Student Government Association** Spring 2009-2010  
**Executive Board, Diversity Chair**  
*Implemented Breaking Bread program, bringing opposing groups together to promote diversity at CofC*

**Phi Eta Sigma Honors Fraternity** 2008-present  
**Vice President, Public Relations Chair**

### **ADDITIONAL VOLUNTEERISM AND SKILLS**

Member, HandsOn Charlotte  
SES Tutoring, McClintock Middle School  
Department of Communication's Mentor-Protégé Program  
Search Committee for Associate Vice President of Diversity at College of Charleston  
Honors Committee Member

- The proposed by-laws, which must include a Conflict of Interest Policy for board members and a stated commitment to the NC Open Meetings Law. (*G.S.143.318.9 et seq*)

# Bylaws

## INVEST COLLEGIATE Consortium, Inc.

### ARTICLE I

#### *Name*

The name of this organization shall be INVEST COLLEGIATE Consortium, Inc. (hereinafter “INVEST COLLEGIATE”).

### ARTICLE II

#### *Purpose*

The sole and exclusive purpose of INVEST COLLEGIATE shall be to establish and conduct a charter school/s to provide and expand educational opportunities for children.

### ARTICLE III

#### *Board of Directors*

Section 1: The Board of Directors shall consist of a least three (3) and no more than five (5) Directors. All Directors shall have identical rights and responsibilities.

Section 2: Board members shall be sought who reflect the qualities and qualifications as follows:

INVEST COLLEGIATE Directors MUST NOT be

- (a) the parent/guardian, step-parent, sibling, grandparent/step-grandparent, or family member of any currently or previously enrolled INVEST COLLEGIATE student.
- (b) a current or former employee including and not limited to full-time, part-time, contractual.
- (c) employed by a business that is a provider for INVEST COLLEGIATE.

Beginning with the first annual meeting and continuing thereafter; all incoming INVEST COLLEGIATE Directors MUST:

Submit an application to the INVEST COLLEGIATE Board of Director’s Nominating Committee which shall be known as the Committee on Directorship. Three seated board members and two members of school leadership selected by the Head of School, who may in his or her discretion self-select, will serve as members of the Committee on Directorship. The application must include but may not be limited to the following:

- Cover letter expressing interest in serving as a Director;
- Current resume;
- Three letters of reference highlighting professional and/or career experiences;
- Criminal Background Investigation Check (completed within 30 days of application date);
- Sealed copy of undergraduate and/or graduate transcripts (minimum of 3.0 GPA required), a minimum of an undergraduate degree with a minimum GPA of 3.0 is required of all INVEST COLLEGIATE Directors and;
- A minimum of three additional letter/s verifying volunteerism and/or leadership within the greater community which may include service as a current or previous member of at least one non-profit entity board.

Individuals interested in serving as a member of the INVEST COLLEGIATE Board of Directors will not receive consideration until all application materials are received and reviewed by a quorum of the currently installed INVEST COLLEGIATE Board of Directors. All Board of Directors nominees will be interviewed by a quorum of the currently installed INVEST COLLEGIATE Board of Directors and two members of school leadership selected by the Head of School, who may in his or her discretion self-select, prior to an offering of Board membership.

Section 3: The INVEST COLLEGIATE Nominating Committee, known as the Committee on Directorship, shall present a slate of potential Directors and officers for election by the Board of Directors sixty days prior to the annual meeting of the Board of Directors. The successful candidates will be presented at the annual meeting of the Board. The annual meeting of the Board will be held the last Thursday of July of each calendar year.

Section 4: Directors shall serve a term of three (3) years from the date of their appointments or until their successors are seated. A full three-year term shall be considered to have been served upon the passage of three (3) annual meetings. After election, the term of a Director may not be reduced, except for cause as specified in these bylaws. No Director shall serve more than two (2) consecutive, three year terms. Directors shall take office on August 1 following the annual meeting at which their appointment is announced. Fulfilling an incomplete term is not considered part of the term limit. Directors shall serve staggered terms which shall be determined at the first annual meeting. The terms will be determined as follows:

Two board members will serve three (3) year terms. Two board members will serve a two (2) year terms. One board member will serve a one (1) year term (see Exhibit "A").

Section 5: Any vacancy occurring in the Board of Directors may be filled upon recommendation of a candidate qualified in accordance with Section 2 hereinabove by the Committee on Directorship by the affirmative vote of the majority of seated Directors. A Director elected to fill the vacancy shall be elected for the unexpired term of his/her predecessor in office.

Section 6: A Director may resign at any time by filing a written resignation with the Chair of the Board.

Section 7: The Board may remove any Officer or Director, with or without cause, by a majority vote of the entire Board of Directors at any regular or special meeting of the Board. Upon majority vote to remove any Officer or Director from the Board, the Board shall deliver by Registered Mail a letter to the effected board member informing he/she of their removal from the board within three (3) days of the vote. For the purposes of this section, the definition of "cause" shall rest in the discretion of a majority of the entire Board of Directors.

Section 8: Members of the Board of Directors:

- (a) Shall receive no payment of honoraria, except reimbursement for expenses incurred in performance of voluntary INVEST COLLEGIATE activities in accordance with INVEST COLLEGIATE adopted written policies; in the absence of adopted written policy, standard operational practice for INVEST COLLEGIATE shall be observed.
- (b) Shall serve the INVEST COLLEGIATE Consortium, Inc. with the highest degree of undivided duty, loyalty, and care.
- (c) All participants in Board work are bound by the Code of Conduct, Conflict of Interest, and Confidentiality policy statements; said statements and policies may be amended from time to time as the entire Board of Directors may determine by majority vote.

(d) Any Director who individually or as part of a business or professional firm is involved in the business transactions or current professional services of the INVEST COLLEGIATE shall disclose this relationship and shall not participate in any vote taken with respect to such transaction or services.

Section 9: All members of the Board of Directors must attend a Board Governance Training arranged by the Chair and the Head of School each year during the annual Board Retreat. The Board Retreat will take place after the annual meeting and prior to the first scheduled meeting of the Board in September. Failure to attend the Board Governance Training will result in dismissal from the Board of Directors. This requirement may be waived upon a majority of the Board of Directors.

## ARTICLE IV

### *Officers*

Section 1: There shall be three (3) Officers of the Board: a Chair, Secretary and Treasurer.

Section 2: The Committee on Directorship shall present a slate of Officers to the Board of Directors. The nominated Officers shall be drawn from among the members of the Board of Directors. The election of Officers shall be held at the annual meeting of the Board.

Section 3: The newly elected Officers shall take office on August 1 following the close of the meeting at which they are elected. The term of office shall be for one year, or until their respective successors assume office. A Director may serve more than one (1) term in the same office, but not more than two (2) consecutive or non-consecutive terms in the same office.

Section 4: In the event that the office of the Chair becomes vacant, the Treasurer shall become Chair for the unexpired portion of the term. In the event that the office of Secretary or Treasurer becomes vacant, the Chair shall appoint the interim Officers to fill the unexpired portion of the terms.

## ARTICLE V

### *Meetings*

Section 1: The annual meeting of the Board of Directors shall occur on the last Thursday in July. There shall be four (4) other regular meetings of the Board held each year on the second Thursday of the months of September, November, February, and April. Notice, via an annual calendar, shall be given to each Director in July of each year of every regular meeting of the Board.

Section 2: Special meetings of the Board may be called by the Chair or by a majority of the Board filing a written request for such a meeting with the Chair and stating the object, date, location, and hour therefore, due notice having been given each Director ten (10) days prior to the meeting.

Section 3: A simple majority of the Directors then in office shall constitute a quorum for the transaction of business at any regular or special meeting of the Board of Directors.

Section 4: The Board shall select its own meeting format in any method allowed by the laws of the state of North Carolina. Any such meeting, whether regular or special, complying with Sections 1 or 2 of Article V shall constitute a meeting of the Board of Directors and shall subscribe to the policies, procedures, and rules adopted by the Board.

Section 5: Notice of all regular and special meetings shall be published via any then acceptable public method in accordance with the Open Meetings Law of the State of North Carolina and in no event less than seven (7) business days prior to the intended meeting date.

Section 6: Notice of all regular and special meetings of the Board, an agenda of all items to be discussed at such meetings, and agenda support materials shall be circulated to all Directors seven (7) business days prior to the meeting. Any Director may waive notice of any meeting. The attendance of a Director at any meeting also shall constitute a waiver of notice of such meeting, except where a Director attends a meeting of the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened.

Section 7: Action taken by the Board of Directors may not be taken without a meeting of the Directors.

Section 8: Voting by proxies shall not be permitted.

Section 9: An absentee Board member may not designate an alternate to represent him or her at a Board meeting.

## ARTICLE VI

### *Staff*

The Board of Directors shall have the discretion to appoint a chief staff person, who shall be responsible for carrying out the work of INVEST COLLEGIATE in accordance with the policies, adopted as written or in standard operational practice, established from time to time by the Board of Directors.

## ARTICLE VII

### *Executive Committee*

Section 1: There shall be an Executive Committee comprised of the officers of the INVEST COLLEGIATE Board. The Executive Committee shall be convened by the Chair when it is not possible to convene the Board in a timely fashion, or shall be authorized to act on behalf of the Board by the action of the Board. Actions of the Executive Committee shall require ratification by the full Board of Directors at its next meeting.

Section 2: The Executive Committee shall serve as an intermediary between the Board and its committees or task forces. The Board of Directors may delegate to the Executive Committee, to the extent provided in a specific resolution, any of the Board's powers and authority, except with respect to:

- (a) the filling of vacancies on the Board of Directors or in any committee which has the authority of the Board;
- (b) the amendment or repeal of Bylaws or the adoption of new Bylaws;
- (c) the amendment or repeal of any resolution of the Board of Directors which provides that such resolution may be amendable or repealed by the Executive Committee;

- (d) the approval of any self-dealing transactions
- (e) the sale, transfer, or distribution of all or substantially all of the assets of the corporation;
- (f) the sale, transfer, or purchase of real property;
- (g) the merger or dissolution of the corporation;
- (h) the appointment of committees of the Board of Directors or the members thereof;
- (i) the setting of the budget or approval of audits; and
- (j) any action prohibited by the Articles of Incorporation, these Bylaws, or the laws of the state of North Carolina.

## ARTICLE VIII

### *Other Committees and Task Forces*

Section 1: The Chair shall appoint committees or task forces of the Board, except the Committee on Directorship. Committees may be composed of a minimum of one (1) and a maximum of two (2) members of the current Board of Directors and a maximum of two (2) community members. The Board may prescribe the need and/or composition of such committees.

Section 2: There shall be a standing nominating Committee, known as the Committee on Directorship. This committee shall be composed of three (3) Board Members recommended by the Chair and elected by the Board of Directors at its annual meeting. Each committee member shall serve a term of two (2) years, and these terms shall be staggered to ensure continuity of committee membership. The committee shall elect its own Chair.

Section 3: The duties of the Committee on Directorship shall be:

- (a) to announce the vacancies, receive the applications, and study the qualifications of candidates and present a slate of the best qualified nominees for the vacant Director positions on the Board;
- (b) to present a slate of nominees for Officers to the Board for election at the annual meeting;
- (c) to recommend candidates to the Board to fill vacancies that arise outside the regular nominating process;
- (d) to oversee ongoing orientation to Directors;
- (e) to recommend the appointment of a past Chair to the Board, if necessary, in the interests of continuity.

## ARTICLE IX

### *Fiscal Year*

The fiscal year of INVEST COLLEGIATE Consortium, Inc. shall begin on July 1 of each calendar year and end on June 30 of the following year.

## ARTICLE X

### *Rules of Order*

Except where there may be a conflict with the Articles of Incorporation or Bylaws of INVEST COLLEGIATE Consortium, Inc., the rules of order in the current edition of Robert's Rules of Order shall govern the conduct of all meetings of INVEST COLLEGIATE. Additionally, all members of the Board of Directors are expected to conduct themselves in a manner appropriate to the expectations of INVEST COLLECIATE students, employees, and community members by demonstrating the highest caliber of individual excellence and positive leadership.

## ARTICLE XI

## *Indemnification*

INVEST COLLEGIATE Consortium, Inc. shall indemnify its Directors, Officers, and employees to the fullest extent of the law of the state of North Carolina.

## ARTICLE XII

### *Amendments*

These bylaws may be amended at a regular or special meeting of the Board of Directors by a simple majority vote of all Directors then in office; provided that notice of the proposed amendment, together with a copy thereof, is delivered via Registered Mail or personal courier to each Director at least fifteen (15) days prior to the meeting at which the amendment is to be considered. Proposed amendments may be subject to additional approval from regulatory or governing agencies.



Exhibit "A"

Three Year  
Term

- Antoinette Ellison, Ed.D.
- Kari Jolly

Two Year  
Term

- Kate Alice Dunaway, M.A.
- Katie Lauren Moske, B.A.

One Year  
Term

- Carey Cannon, Ph.D.

- A copy of the articles of incorporation, if available. If not available, must be available prior to interview by SBE, so must show that it has been applied for prior to submission of application.

**See Following Pages.**

## ARTICLES OF INCORPORATION OF

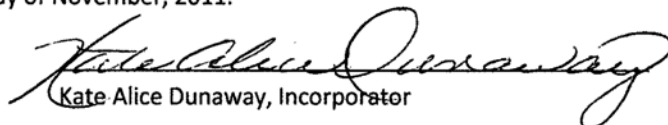
**INVEST COLLEGIATE Consortium, Inc.**

Pursuant to §55A-2-02 of the General Statutes of the State of North Carolina, the undersigned hereby submits these Articles of Incorporation for the purpose of forming a nonprofit corporation.

1. The name of the corporation is: INVEST COLLEGIATE Consortium, Inc.
2. The corporation is a charitable corporation within the meaning of N.C.G.S. § 55A-1-40(4).
3. The corporation will have no members.
4. The address of initial registered office of the corporation in the State of North Carolina is 110 Poppy Field Lane, Mooresville, Iredell County, North Carolina 28115 and the name of the initial registered agent is Kari B. Jolly.
5. The street address of the principal office of the corporation is 110 Poppy Field Lane, Mooresville, Iredell County, North Carolina 28115.
6. The mailing address of the corporation is Post Office Box 1202, Davidson, Mecklenburg County, North Carolina 28036-1202.
7. The purposes for which the corporation is organized are:
  - a. To operate charter schools in North Carolina, pursuant to the authority of N.C.G.S. 115C-238.29A *et seq.*
  - b. To attract support and contributions from, directly or indirectly, the general public and governmental units as described in §170(b)(1)(A)(ii) and §170(b)(1)(a)(vi) of the Internal Revenue Code.
  - c. To do all things necessary, suitable, and proper for the accomplishment of any of the purposes or the attainment or the furtherance of any of the objects set forth in these articles of incorporation and to engage in any lawful act or activity for which non-profit corporations may be organized under Chapter 55A of the General Statutes of North Carolina, and which is permitted to be done or carried on:
    - i. by a corporation exempt from federal income tax under §501(c)(3) of the Internal Revenue Code;
    - ii. by a corporation, contributions to which are deductible under the Internal Revenue Code;
    - iii. by a corporation exempt from state income and franchise taxes or the corresponding provisions of any future North Carolina revenue laws.
  - d. To solicit, acquire, or receive by gift, grant, devise, bequest or otherwise, and to hold, manage, invest, reinvest, administer, disburse, and otherwise deal with all property of any kind, class or character, whether real or personal, tangible or intangible, wherever situated, together with all income and profits therefrom that may at any time and from time to time be contributed or otherwise be available to the corporation, said property to be used for the operation of a charter school or schools.
8. The name and address of the incorporator is Kate Alice Dunaway, 149 Sailview Road, Mooresville, Iredell County, North Carolina 28117.
9. The number of directors constituting the initial board of directors shall be three (3); and the names and addresses of the persons who are to serve as the initial directors are:

- a. Kate Alice Dunaway, 149 Sailview Road, Mooresville, Iredell County, North Carolina 28117
  - b. Antoinette Ellison, Post Office Box 5233, Charlotte, Mecklenburg County, North Carolina 28299-5233
  - c. Kari B. Jolly, 110 Poppy Field, Mooresville, Iredell County, North Carolina 28115.
10. Upon the dissolution of the corporation, assets thereof after all liabilities and obligations of the said corporation have been paid or adequate provisions made therefore, shall be disposed of exclusively for the purposes of the corporation in such manner or to such organization or organizations organized for purposes similar to those set forth in Article 7 herein as shall at the time qualify as an exempt organization or organizations within the meaning of section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government or local education authority, for a public purpose as the board of directors shall determine and as may be more particularly provided in the by-laws of the corporation.
11. No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to its members, trustees, 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 Article 7 hereof. No substantial part of the activities of the corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provision of these articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code; or (b) by a corporation, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code; or (c) by the type of corporation described in Article 7 above.
12. To the fullest extent permitted by the North Carolina Nonprofit Corporation Act as it exists or may hereafter be amended, no person who is serving or who has served as a director of the corporation shall be personally liable for monetary damages for breach of any duty as a director. No amendment or repeal of this article, nor the adoption of any other amendment to these articles of incorporation 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.
13. These articles of incorporation will be effective upon filing.

This the 2 day of November, 2011.

  
Kate Alice Dunaway, Incorporator

- A description of the governing board's functions, duties, roles and responsibilities as it relates to overseeing the charter school and its mission.

The responsibilities of the INVEST COLLEGIATE Board are as follows:

- Exemplify the school mission as outlined in the charter;
  - Recruit, support, and evaluate the Head of School;
  - Demonstrate a positive and supportive INVEST COLLEGIATE culture;
  - Maintain the highest degree of confidentiality and professionalism;
  - Ensure adequate resources;
  - Enhance the school's public standing;
  - Enhance legal and ethical integrity and maintain accountability;
  - Recruit and orient new board members;
  - Assess board performance annually;
  - Plan, coordinate and implement the INVEST COLLEGIATE Annual Board Retreat; and
  - Provide for opportunities to set and further the INVEST COLLEGIATE strategic plan.
- Explain the decision-making processes the board will use to develop school policies.

The INVEST COLLEGIATE board will focus on broad organizational policies with development and implementation of operating policies and procedures to the school leadership. When policies are created the INVEST COLLEGIATE Board will follow the steps as outlined in Charter Schools Trustees Guide by Marci Cornell-Feist as follows:

- Board level discussion.
  - Assign a team to draft a new policy.
  - Write a first policy draft.
  - Ask legal counsel to review the draft policy.
  - Present the draft policy to the board for approval.
  - Continue to review and revise board policies periodically.
- Describe the organization's performance-based goals for the charter school. Organizational goals and measurable objectives should describe and measure the effectiveness and viability of the organization.

INVEST COLLEGIATE will

- Maintain student enrollment consistent with the expectations outlined in the charter application;
  - Maintain a balanced budget;
  - Complete a certified audit each calendar year;
  - Demonstrate continued academic growth and strength as measured by state and/or national testing; and
  - Develop key indicator/s of a successful school (enrollment interest; academic designations, faculty and community satisfaction).
- Describe how the governing board will ensure that current and future board members avoid conflicts of interest.

The INVEST COLLEGIATE Board of Directors will establish the protocol to avoid conflicts of interest as outlined on pages 34-36 of Charter School Trustees Guide, by Marci Cornell-Feist. Cornell-Feist

provides a specific template and course of action for INVEST COLLEGIATE in creating a school community built on integrity and leadership.

All members of the INVEST COLLEGIATE Board of Directors will sign the following Conflict of Interest Statement and Confidentiality Agreement every July prior to each Annual Meeting of the Board of Directors:

## Conflict of Interest Statement and Confidentiality Agreement

To: Officers, Directors, Committee Members, Staff Members, and certain Consultants

The undersigned has had and will have possession of or access to confidential information relating to the business of INVEST COLLEGIATE Consortium, Inc., including writings, equipment, processes, drawings, reports, manuals, invention records, financial information, business plans, student/associate lists, the identity of or other facts relating to prospective customers, inventory lists, arrangements with suppliers and customers, computer programs, or other material embodying trade secrets, customer or product information or technical or business information of INVEST COLLEGIATE Consortium, Inc.. All such information, other than any information that is in the public domain through no act or omission of the undersigned or which he/she is authorized to disclose, is referred to collectively as the "Company Information". During and for a period not to exceed the one year anniversary of the undersigned's termination of association with INVEST COLLEGIATE Consortium, Inc., the undersigned shall not (i) use or exploit in any manner the Company Information to himself/herself or any person, partnership, association, corporation or other entity other than INVEST COLLEGIATE Consortium, Inc., (ii) remove any Company Information, or any reproduction thereof, from the possession or control of the Company or (iii) treat Company Information otherwise than in a confidential manner.

No member of the Board of Directors or any of its Committees, staff, or consultants shall derive any personal profit or gain, directly or indirectly, by reasons of his or her participation with INVEST COLLEGIATE Consortium, Inc. Each individual shall disclose to the organization any personal interest, which he or she may have in any matter pending before the organization and shall refrain from participation in any decision on such matter.

Any member of the Board, any Committee or Staff who is an officer, board member, a committee member or a staff member of a client organization or vendor of INVEST COLLEGIATE Consortium, Inc. shall identify his or her affiliation with such agency or agencies; further, in connection with any committee or board action specifically directed to that agency, he/she shall not participate in the decision affecting that agency and the decision must be made and/or ratified by the full board.

Any member of the Board, any Committee, Staff and certain Consultants shall refrain from obtaining any list of clients for personal or private solicitation purposes at any time during the term of their affiliation.

At this time, I am a Board member, a committee member, consultant or an employee of the following organizations:

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Now this is to certify that I, except as described below, am not now nor at any time during the past year have been:

- 1) A participant, directly or indirectly, in any manner, agreement, investment, or other activity with any vendor, supplier, or other party doing business with INVEST COLLEGIATE Consortium, Inc., which has resulted or could result in personal benefit to me.
  - 2) A recipient, directly or indirectly, of any salary payments or loans or gifts of any kind or any free service or discounts or other fees from or on behalf of any person or organization engaged any transaction with INVEST COLLEGIATE Consortium, Inc.
- Portray how the board will involve parents and community members in governing the school.

The INVEST COLLEGIATE Board of Directors will govern the school with a strategic focus within a telescopic environment. The Board of Directors, in collaboration with the Head of School, school leadership, and collegiate leaders will provide opportunities for parents and the greater community to share information and ideas for future planning at quarterly board meetings and the board's annual retreat.

**ADMISSIONS POLICY** (*G.S.115C-238.29B(b)(4); G.S. 115C-238.29F(d)(1)*)

Provide a description of the policies and the procedures for admitting students to the proposed charter school, including specific details of the enrollment lottery plan, statutorily allowed preferences, a plan to develop clear procedures for withdrawals and transfers, as well as subsequent marketing strategies to reach all demographic groups.

INVEST COLLEGIATE is open to all students who would otherwise qualify for enrollment in North Carolina Public Schools. Enrollment for the 2013-2014 school year will begin immediately upon approval from the NC State Board of Education in early 2013. Enrollment will continue until Friday, April 19, 2013 at midnight. At that time, the determination will be made regarding a necessary lottery or if rolling enrollment will continue until all spaces are filled in Grades K-6.

Any student, residing in the state of North Carolina, must complete the *IC Registration Application* to be considered for enrollment at INVEST COLLEGIATE. The required application will consist of, and may not be limited to, the following: a personal application form which includes student's name, place of residence, parents'/guardians' names and addresses, student's birth date, present school enrollment, current grade level, acknowledgement of whether the student is currently served by an IEP, and release of records signature for LEA records, including and not limited to school records, IEP information as applicable, and any other pertinent information for a complete record per North Carolina DPI reporting requirements. The *IC Registration Application* will include the necessary Transfer Request Forms, signed by the parent or guardian, to be utilized *only if* the child is enrolled through the open enrollment or the lottery, if necessary. Each family will be expected to complete all information as required by the North Carolina Department of Public Instruction which may include, and is not limited to, the following: Household Income Survey and other reports as requested by the North Carolina Department of Public Instruction and the US Department of Education.

Should applications exceed the number of spaces, by Grade Level, a lottery will be held in an open public meeting. No criteria for admission will be utilized other than a completed application form and residence in North Carolina. A Waitlist will be maintained for the entire school year in the event that space becomes available and the school chooses to continue to fill any open enrollment positions. All rules and regulations regarding siblings, multiple births, and specific policies and procedures regarding charter school lotteries will be adhered to by INVEST COLLEGIATE.

## V. EDUCATION PLAN

**NOTE:** Answer all sections completely, include your answers in this section of the application, do not include as an Appendixes. Do not use "same as LEA" or "whatever the law says". The State Board of Education shall give priority consideration to the applicants who demonstrate potential for significant, meaningful innovation in education. Give explanations. Lack of proper documentation will jeopardize the application review.

**INSTRUCTIONAL PROGRAM:** (G.S. 115C-238.29F (d))

Provide a detailed description of the overall instructional program, including the following:

- Educational theory, foundation of the model, and proposed innovative offerings.

INVEST COLLEGIATE will provide a K-12 program grounded in a comprehensive liberal arts program which includes an appreciation and demonstration of the relationship between expectation and excellence. Beginning in Kindergarten, students will develop an understanding of their role in their own education through the curriculum outlined in The Leader in Me by Stephen Covey. The entire school community will utilize this model to develop individual educational ownership and leadership by investing in each individual's potential for greatness.

### *Healthful Living*

The entire school community will participate in the programming as suggested by John Ratey in SPARK! which highlights the relationship between academic success and healthy living. Each school day, the K-12 school community will participate in daily movement and exercise based on the programs developed as a result of John Ratey's research.

### *Core Knowledge*

The K-8 program includes the foundations of Core Knowledge as provided by E. D. Hirsch, Jr.'s theory of *cultural intelligence*. The entire K-8 community will extend the North Carolina Course of Study and the National Common Core Standards through integration of this course of study within the curriculum. Families will be offered opportunities to attend school based seminars to expand their awareness of *Core Knowledge*.

### *Fine Arts*

INVEST COLLEGIATE acknowledges the theory of Multiple Intelligences which maintain that Fine Arts are central to character and brain development. Fine Arts training accesses the multiple intelligences and provides a needed medium for students adept in spatial, musical, and kinesthetic intelligences. The INVEST COLLEGIATE Fine Arts program will include Band, including Percussion and Strings; Music and Choral Education, Visual Arts, and Theatre. Students in Grades K-5 will participate in classes in Music, Visual Arts, and Theatre. Beginning in Middle School (Grades 6-8), all students will participate in Visual Arts and all will audition for placement in Choral Ensemble, Theatre, or Band at the conclusion of the Fifth Grade year. All students will complete three (3) years of their selected (based on their placement audition) in addition to Visual Arts. Beginning in Upper School (Grades 9-12), students will audition for placement in Choral Ensemble, Band, Theatre, or Visual Arts. All students will complete four years of their selected Fine Arts domain (based on their placement audition) during Upper School. Auditions will be conducted by the Fine Arts Department at the direction of the Head of School.



### *Community Culture: FISH!*

As INVEST COLLEGIATE builds community, the FISH! (Lundin, Stephen C., Paul, H., and Christensen, J.) and FISH! for Schools model will be incorporated throughout the school. The four principles: *Make Their Day, Be There, Choose Your Attitude, and Play* will be evident among faculty and students. INVEST COLLEGIATE families are expected to embrace this model in creating a dynamic and motivating school culture for all children.

### *Spanish Language*

INVEST COLLEGIATE aspires to the principals of a Proficiency Spanish Language Program. Beginning in Kindergarten, students will receive instruction in Spanish through a continuous, sequential, cumulative, and standards-based language program. INVEST COLLEGIATE's Lower School program will offer K-5 students Spanish instruction three times per week. With a goal of Spanish language proficiency, the Spanish Course of Study will intensify in Middle and Upper School. All students in Grades 6 – 12 will take one full year of Spanish each academic year. Beginning with Spanish II, the course offerings will be Spanish Honors or Advanced Placement.

### *Global Initiatives*

To further our students' global awareness, all Fifth and Eighth Grade students will participate in the simulation, *The Peace Game*, developed by John Hunter. This six (6) – eight (8) week interactive program available through *The Peace Game Foundation* allows students to explore the dynamics of human decisions within our global environment. INVEST COLLEGIATE is committed to providing opportunities for student's to explore complex global issues within the framework of our educational community.

### *Writing*

Beginning in Kindergarten, every student and faculty member will participate in daily journal writing as a means of creative expression and for personal growth. The entire school community, including families, will be presented with in-service/seminar opportunities to understand the positive ramifications of daily journal writing. A designated time, determined by school faculty, will be integrated into each school day. These writing journals will become one aspect of a student's conversations during Family Conferences. Additionally, the journal writing will be utilized in Grades 9-12 as a window into individual interests and opportunities as students prepare applications for undergraduate study.

- Teaching approach, class structure, curriculum design, courses of study, sample daily schedule, pillars of the school culture, and instructional methodology that align with the school's mission.

INVEST COLLEGIATE faculty are expected to deliver an exemplary educational program within the framework of the school's mission and charter. Demonstration of the action domains: imagine, nurture, value, engage, sustain, and transform will be developed through the collective reading, study, and conversations, led by school leadership, which will include and not be limited to the following books: The Starfish and the Spider, Brafman, O. and Beckstrom, R.; Outliers, Gladwell, M.; Strengthsfinder, Rath, T.; The Good School, Tyre, P.; Good to Great, Collins, J.; The Speed of TRUST, Covey, Stephen; SPARK, Ratey, John R.; The First Days of School, Wong, H. and Wong, R.; and The Leader in Me, Covey, Stephen R.

The Core Knowledge sequence will be aligned with the North Carolina Standard Course of Study and the National Common Core Standards, as applicable. As evidenced, Core Knowledge is a sequenced curriculum based on a nationally researched core body of knowledge to provide students the opportunity to meet standards for *cultural literacy*. INVEST COLLEGIATE subscribes to the belief that as a community, we benefit from a shared body of knowledge which forms a framework for understanding, acceptance, and the expansion of learning. The Core Knowledge Foundation provides a well-defined training program for educators. INVEST COLLEGIATE educators will be provided training in the Core Knowledge curriculum to expand their understanding and improve their delivery of instruction within the classroom and school.

INVEST COLLEGIATE will strive to maintain class size as outlined by Peg Tyre in The Good School. However, during INVEST COLLEGIATE's formative years (years 1-5), Kindergarten, First, and Second Grade classrooms will maintain a class size not to exceed 22. Third, Fourth, and Fifth Grade classrooms will maintain a class size not to exceed 24. Class size in Middle and Upper School will vary dependent upon the course. For example, a Choral Ensemble may have 28 students per class and an Advanced Placement Chemistry Course may have 15 students per class. As stated in The Good School, "In general, a highly effective teacher is probably better for your child than is a small class." p. 85. INVEST COLLEGIATE remains mindful of the research and will continue to strive for class sizes of 18 – 20 in Lower School (Grades K-5) as the school develops.

#### The Lower School

The Lower School will consist of Kindergarten through Grade Five with five classes per grade level. The anticipated Lower School enrollment during the first year of the school's operation is six-hundred (600) students. All students will participate in the programs outlined including Visual Art, Music, Theatre, Physical Education, and Spanish. Additionally, Drumming and Strings will be offered during a quarterly sequence throughout the year.

#### The Middle School

The Middle School will consist of Grades Sixth – Eighth. During the 2012-2013 school year, the Middle School will offer Sixth and Seventh Grades with eighty (80) students per grade level. Beginning in 2013-2014, INVEST COLLEGIATE will add one grade per year through Grade 12. The Middle School students will experience year round classes in four core subjects: English/Language, Mathematics, Science, and Social Studies. Additionally, all Middle School students will enroll in Spanish, Visual Arts, Physical Education, and Band, Theatre or Choral Ensemble based on their placement audition. Middle School students will experience increased offerings, to be determined by school leadership, through membership in organizations (Grades 6-8) and athletics (Grades 7 and 8).

#### The Upper School

The Upper School will include Grades 9-12; will offer an Honors and Advanced Placement Course of Study with collaboration and course offerings within the community college environment. Courses within the North Carolina Course of Study, designated as General (non-Honors/non-AP), will be offered until the Honors and/or Advanced Placement designation is available for the course. The INVEST COLLEGIATE program is designed for college bound students and families who are committed to an exemplary educational course of study which exceeds state and/or national standards.

- Demonstration that selected goals are clear, specific, measurable, ambitious and attainable.

INVEST COLLEGIATE prepares students for college/university placement following High (Upper) School. Beginning with 2013-2014, INVEST COLLEGIATE will strive to meet and/or exceed annual growth rates as set by North Carolina DPI and those which may be required for Adequate Yearly Progress. INVEST COLLEGIATE's goal is to meet and/or exceed district (LEA), state, and or national averages.

Examination of the Charlotte Mecklenburg Schools Demographics (Appendix I) and Mathematics Test Scores (Appendix II) indicates the need and the significance of the INVEST COLLEGIATE educational opportunity for children in the metro-Charlotte area. Within a smaller school environment, a focus on educational excellence, exemplary faculty, and a transformative school culture, INVEST COLLEGIATE will demonstrate academic growth individually and collectively to provide all students the opportunity to attend a college/university following graduation.

- Entrance and exit requirements as well as graduation requirements (if the school is to be high school).

High School (Upper School, Grades 9-12, beginning in 2016-2017) graduation requirements will require, at a minimum, the following:

- Four English Courses (Honors or Advanced Placement)
- Four Mathematics Courses, which must include Algebra I and II; Geometry; and one (1) higher level mathematics course where Algebra I is a prerequisite
- Three Science Courses (Honors or Advanced Placement) which will include an environmental, biological, and physical science with at least one laboratory course;
- Three Social Science Courses (Honors or Advanced Placement) which will include a course/s in Civics and Economics, American History, and World History;
- Four Courses (Honors or Advanced Placement, beginning in Spanish III) in Spanish Language
- Four Fine Arts courses in a student's discipline based on the placement audition;
- 120 hours of documented Service Learning prior to graduation;
- One North Carolina Healthy Living/Physical Education Course;
- Three Physical Education Courses/Participation of minimum of 40 contact hours per academic year;
- Computer Proficiency demonstrated through state/national testing;
- Writing Proficiency demonstrated through state/national testing; and
- Two electives chosen from the electives available during the academic year.
- Documented attendance at eight (8), two (2) per year, cultural and/or civic events of a secular nature.

All INVEST COLLEGIATE expects all entering Ninth Grade students will be prepared to enroll and successfully complete Algebra I. In 2013, INVEST COLLEGIATE will implement mathematics curriculum in Grade 6, in 2014 in Grade 7, and in Grade 8 (2015-2016) leading to Algebra I in Ninth Grade. Incoming Ninth Grade students and families will be advised of this expectation.

- The school calendar (must provide instruction for a minimum of 185 instructional days) (*G.S.115C-238.29F(d)(1)*) and how it coincides with the tenets of the proposed mission.

## INVEST COLLEGIATE 2013-2014 Student Academic Calendar

|                          |  |
|--------------------------|--|
| July 31                  | First Day of School: Kindergarten and First Grade (Half Day)                   |
| August 1                 | First Day of School Second Grade - Sixth Grade (Half Day)                      |
| August 2                 | All Grades K-6 – Early Dismissal (Half Day)                                    |
| August 30                | Early Dismissal/Academic Planning  |
| September 2              | School Closed/Labor Day  |
| September 27             | Early Dismissal/Academic Planning  |
| September 27             | End of First Academic Session (42 days)  |
| September 30 - October 4 | Fall Break   |
| October 7                | School Resumes   |
| October 7 – 18           | Family Conference Weeks  |
| October 25               | Early Dismissal/Academic Planning  |
| November 22              | Early Dismissal  |
| November 22              | End of Second Academic Session (35 days)                                       |
| November 22- January 3   | Winter Break   |
| January 6                | Classes Resume   |
| January 20               | School Closed/Martin Luther King Day   |
| January 31               | Early Dismissal/Academic Planning  |
| January 27 – February 7  | Family Conference Weeks  |
| February 28              | Early Dismissal/Academic Planning  |
| March 3                  | End of Third Academic Session (40 days)  |
| March 24 – April 4       | Spring Break   |
| April 7                  | Classes Resume   |
| April 25                 | Early Dismissal/Academic Planning  |
| May 2                    | End of Fourth Academic Session (34 days)                                       |
| May 23                   | Early Dismissal/Academic Planning  |
| May 26                   | School Closed/Memorial Day   |
| June 20                  | Last Day of 2012-2013 Academic Year<br>End of Fifth Academic Session (35 days) |
| August 4                 | Classes Resume/2014-2015 Academic Year   |

- A concise description of any evaluation tool or test, if any, that the proposed charter school will use in addition to any state or federally mandated tests and how this data will be used to drive instruction and improve the curriculum over time for the benefit of students.

INVEST COLLEGIATE's curriculum will be fully aligned with the North Carolina Course of Study and the National Common Core Standards which provide for evaluation through the North Carolina ABC Accountability Model and other nationally required testing of all students at specific grade levels. INVEST COLLEGIATE will utilize the North Carolina state testing which includes End of Grade Tests, End of Course Tests, and specific subject tests.

In addition, Advanced Placement Scores, Subject Test Scores, ACT, and SAT scores will be utilized to evaluate, expand, and develop curriculum for INVEST COLLEGIATE. In subsequent years, student graduation rates, dropout data, and college acceptance rates will be utilized to further strategic plans within the INVEST COLLEGIATE educational program.

- Provide an overview of the professional development needs associated with the mission and proposed instructional program. Be sure this discussion matches with the funding of the budget section.

All INVEST COLLEGIATE personnel will participate in on-going professional development which includes and is not limited to: Core Knowledge Training; Health, Safety, and Fire Safety training; First Aid and CPR training/certification; Leadership development (as outlined in required reading/seminars); and heterogeneous Cohort Group Seminars which support and reinforce the INVEST COLLEGIATE mission.

In year 2013-2014, members of the Board of Directors, the Head of School, Dean, and Collegiate Leaders will provide professional development at the school site to develop the INVEST COLLEGIATE culture and to maximize the budget for professional development. In the first year, approximately \$300.00 is allocated for professional development for each INVEST COLLEGIATE member.

- An explanation of how the school will provide assistance to students that are not performing at expected levels to ensure the continued progress of student growth. The applicant needs to define their "expected levels" of performance and delineate a plan accordingly.

Every adult in the INVEST COLLEGIATE community is responsible for the academic and personal growth of every INVEST COLLEGIATE student. Every adult in the INVEST COLLEGIATE community professes the belief that every child will experience academic success and personal success given an environment found in the active domains: imagine, nurture, value, engage, sustain, and transform. Each Collegiate Leader, faculty member, is responsible for delivering instruction and motivating students in an environment which supports and nurtures children and expects successful academic growth. INVEST COLLEGIATE partners with students, families, and the greater school community to ensure academic success and personal growth.

- Details in how the proposed charter plans to involve parents and community members within the school.

INVEST COLLEGIATE will be located within a vibrant urban community which lends itself to active involvement by parents and community members. Families and community members will be encouraged to participate in school events and celebrations throughout the school year. Additionally, parents/guardians are expected to attend two Family Conferences per year during the designated Family Conference Weeks.

INVEST COLLEGIATE families and community members will be encourage to share their time and resources through a volunteer program which will be managed by the Invest Collegiate Leader Dean) of 21<sup>st</sup> Century Initiatives. All volunteers, parents and/or community members, will be required to complete a have a clear Criminal Background Check prior to any volunteer activities in conjunction with INVEST COLLEGIATE.

- Describe how the school will meet the needs of gifted, at-risk children, English language learners by explaining the proposed school's process for identification and service of these students.

Collegiate Leaders, faculty members, and EC faculty members will be responsible for identifying and designing a classroom and courses of study to meet the needs of the Gifted Learner, English language learners, and at risk students. At any point, the classroom teacher, Guidance Counselor, Head of School, EC faculty, and/or School Nurse will be involved in bringing a team approach, best practices, and a written plan of action to meet the needs, academic or otherwise, of all INVEST COLLEGIATE students.

- Discuss any proposed extra-curricular activities to be offered by the school and how these offerings match the over-all mission of the school.

INVEST COLLEGIATE may offer the following opportunities for students beyond the school day: After School Enrichment; Before and After School Study Seminars; Before and After School Arts including Chorus, Theatre, and Visual Arts; Before and/or After School STEM programs; Athletics beginning in Grade 7 which may include Tennis, Volleyball, Golf, Swimming, Basketball, Cross Country, Soccer, Softball, Baseball, Ballet, and Yoga. Football and Lacrosse will not be offered or financially supported, in any manner, by INVEST COLLEGIATE. The Head of School, in collaboration with Collegiate Leaders, makes recommendations regarding all programs beyond the school day.

### **SPECIAL EDUCATION** (G.S.115C-106)

The charter school must accept special needs children under the federal legislation *Individuals with Disabilities Education Act (IDEA)* (20 U.S.C. 1400 Et seq.) and the state legislation (G.S. 115C-106 Et seq.). The proposed school will abide by the charter school legislation, G.S. 115C-238.29F(g)(5), as stated below:

*A charter school shall not discriminate against any student on the basis of ethnicity, national origin, gender, or disability. Except as otherwise provided by law or the mission of the school as set out in the charter, the school shall not limit admission to students on the basis of intellectual ability, measures of achievement or aptitude, athletic ability, disability, race, creed, gender, national origin, religion, or ancestry.*

Provide a clear and thorough explanation of the procedures the proposed charter will follow to insure compliance of the above laws. As part of this section, the plan should include how you will identify and meet the needs of your

projected students (at-risk, gifted/talented, English language learners, and students with disabilities) in a manner that aligns with the overall curriculum, instructional approach, and mission.

INVEST COLLEGIATE recognizes that students who require special education services comprise approximately 13% of the public school population. INVEST COLLEGIATE also recognizes that these students are capable of meeting achievement standards if given access to the same course of study with instructional strategies designed to meet their needs, support in the classroom and appropriate accommodations.

INVEST COLLEGIATE will offer a rigorous and relevant curriculum to all students including students who are gifted and talented and students with special needs. To ensure that the needs of all students are met, INVEST COLLEGIATE will train all faculty members on state and federal regulations for serving exceptional children. All staff members will be trained on the history of Public Law 94-142 making a free and appropriate education available for all handicapped children ages 3 – 21.

Faculty members will also be trained regarding the Education of the Handicapped Act Amendments of 1990 (PL 100-476) and the need to include transition services and assistive technology services such as rehabilitation counseling and social work when needed.

Faculty members will be

- trained on the key provisions of federal and state regulations including the responsibility to actively seek out and identify children who have special needs,
- appropriately evaluate students prior to placement,
- develop and Individual Education Plan based on the individual needs of students,
- include parents/guardians in decision making, and
- provide related services as appropriate.

INVEST COLLEGIATE will ensure that each student is educated in the least restrictive environment.

### **STUDENT CONDUCT AND DISCIPLINE** (G.S.115C-238.29B(b)(12); G.S. 115C-238.29F(d)(4 and 5))

Provide drafts, included in this section, of student handbooks and other policies governing student conduct and discipline. Include policies and procedures governing suspension and expulsion of students. Specifically address these policies with respect to exceptional children. Also describe how a parent could appeal the decision of a school administrator through a grievance process.

### **Operational Policies**

#### ***INVEST COLLEGIATE: Student Expectations***

INVEST COLLEGIATE sets high standards for students, families and Collegiate Leaders. In order to graduate responsible citizens, we have designed a challenging, rigorous curriculum and seek to create a dynamic learning community. This will only be accomplished with the active participation of our entire educational community.

The following guidelines clarify expectations for our students:

- Students will focus on their academic responsibilities during school hours.

- Students will be respectful and kind to each other, to the Collegiate Leaders, and to the greater community.
- Students will adhere to the uniform policy outlined in the INVEST COLLEGIATE charter.
- Students will attend class regularly, be on time, and engaged every day.
- Students will accept ownership for helping to maintain our school environment.

### ***Code of Conduct***

INVEST COLLEGIATE’s discipline policy will support the attainment of the school's mission and reinforce the active domains: imagine, nurture, value, engage, sustain, and transform. The INVEST COLLEGIATE model leads to a nurturing school environment that sets the stage for engagement and academic excellence. Collegiate Leaders will uphold high expectations and remain responsible for establishing a positive school climate that continuously identifies and acknowledges students for respectful behavior. Collegiate Leaders will model and identify appropriate behaviors in varying environments throughout the course of the school day and academic setting. Learning behavior transitions in varying environments remains a valuable component of the socialization process of a productive citizen. All school Collegiate Leaders will be trained to support and implement a school-wide positive discipline model. The Collegiate Leaders and students will work together to implement the INVEST COLLEGIATE model.

### ***Dress Code: School Uniforms***

To support the establishment and consistency of an effective learning community all students at INVEST COLLEGIATE will wear uniforms. The uniforms will be selected by the Collegiate Leaders, including school leadership, for each academic year. The uniforms will vary according to the Lower, Middle, and Upper Schools.

### ***Discipline***

In most cases, the appropriate Collegiate Leaders, faculty members, within the classroom setting will manage discipline immediately and effectively. In some situations, either due to the seriousness or repetitive nature of the offense, intervention by the Head of School is warranted. The Head of School will be responsible for any action requiring probation, suspension or expulsion.

#### **1. Less Serious Violations**

Less serious violations will be managed by the classroom teacher or a Collegiate Leader, faculty member, responsible for student supervision. Such violations consist of disruptive classroom behavior, discourtesy, defacing property, roughhousing, profanity, etc. The attending Collegiate Leader may bring these situations to the attention of the Head of School or appropriate classroom Collegiate Leader if disciplinary action is warranted or if these actions are repeated.

#### **2. More Serious Violations**

More serious violations such as unauthorized absence, smoking or use of tobacco products, or repeated lesser violations will be dealt with in a more formal basis. Detention, campus work detail, and silent lunch are a few of the penalties that may be assigned.

#### **3. Major Violations**

Major violations are those that are serious enough to require probation, suspension or expulsion. These



violations will be immediately reported to the Head of School. They include: physically threatening others, the use or possession of illegal or controlled substances, the use or possession of a weapon or any object being used as a weapon, academic dishonesty, theft or destruction of property and fighting which results in physical harm or injury. Any of these violations may result in probation, suspension, or expulsion.

**Note:** A detailed list of infractions and the range of resulting consequences is detailed herein. Additions, corrections, and deletions of these rules can ensue. Students and parents will be notified of changes or additions. These policies and others adopted by the INVEST COLLEGIATE Board will be distributed to families and students in an INVEST COLLEGIATE FAMILY GUIDE.

### *Student Expulsion and Exclusion Policy*

A pupil shall not be suspended from school or recommended for expulsion unless an INVEST COLLEGIATE Head of School (Lower, Middle, Upper) determines that the student has:

- a) Caused or attempted to cause or threatened to cause physical injury to another person;
- b) Possessed, sold or otherwise furnished any fire arm, knife, explosive, or other dangerous object, unless in the case of possession of any such object, the pupil had obtained written permission to possess the item from a certified school employee, which is concurred by the principle or the designee of the Head of School;
- c) Unlawfully possessed, used, sold or otherwise furnished, or been under the influence of any controlled substance or alcoholic beverage or an intoxicant of any kind;
- d) Unlawfully offered, arranged or negotiated to sell any controlled substance or an intoxicant of any kind, and then either sold, delivered or otherwise furnished to any person another liquid, substance, or material and represented the liquid, substance, or materials as a controlled substance, alcoholic beverage or intoxicant;
- e) Committed robbery or extortion;
- f) Caused or attempted to cause damage to school property or private property;
- g) Stolen or attempted to steal school property or private property;
- h) Possessed or used tobacco, or any products containing tobacco or nicotine cigarettes, smokeless tobacco, or chew packets or betel. This section does not prohibit use or possession by a pupil of his or her own prescription products;
- i) Committed an obscene act or engaged in habitual profanity or vulgarity;
- j) Unlawfully offered, arranged or negotiated to sell any drug paraphernalia;
- k) Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, school officials or other personnel engaged in the performance of their duties.
- l) administrators, school officials or other personnel engaged in the performance of their duties.
- m) Knowingly received stolen school property or private property.

Disciplinary consequences for behavior violation of the Student Code of Conduct:

Students and parents/guardians will understand that the following disciplinary actions could be implemented for acts enumerated in this section and related to school activities which occur at any time, including (but not limited to) any of the following:

1. While on school grounds;
2. While going to or coming from school;
3. During the lunch period whether on or off campus;

4. During, or while going to or coming from, a school sponsored activity.

#### Act of Violence

- Fighting is not allowed at INVEST COLLEGIATE. This action is considered one of the most severe infringements on the rights of others. It is also a direct attack on the educational process. Acts of violence, whether directed at another student, teacher or adult will carry a severe penalty. Possible disciplinary actions: On-campus suspension, home suspension or expulsion. Flagrant or repeat offenses may result in a maximum consequence of expulsion.
- Threatening to cause physical harm detracts from the educational setting and places students in fear. Thus, depending on the severity of these actions, the following disciplinary actions may result: On-campus suspension, work details, home suspension or other recommendations to expel.

#### Weapons and Dangerous Objects

- a. Possession of a define weapon will not be tolerated. Possession of a weapon will result in disciplinary action -- home suspension or expulsion.
- b. Possession of fireworks and explosives or the use of these items will also result in home suspension or expulsion.

#### Tobacco, Drugs, and Alcohol

- a. INVEST COLLEGIATE is a tobacco, drug and alcohol-free campus. Any possession or use of these substances is strictly prohibited. Offenses of the rule may result in on campus suspension, home suspension or expulsion. This rule, as all school rules apply, for after school events and school trips.
- b. Possession of these substances with the intent to distribute or sell will result in expulsion. The sale of look-alike drugs will result in home suspension for the first offense and expulsion for any subsequent offense.
- c. Drug paraphernalia, whether possessed for use or with the intent to sell or distribute, will be seen as an attempt to promote the distribution and use of illegal drugs and will result in suspension or expulsion.

#### Stealing, Robbery, or Extortion

- a. These offenses will result in on-campus suspension, work detail, home suspension or expulsion. The severity of the crime and the number of offenses will dictate the punishment.

#### Damage to Property

- a. Causing or attempting to cause damage to school property will result in the replacement of the damaged property by the student. The parent or guardian will also be held responsible for the replacement of the damaged property.
- b. Severe cases of damaging, defacing or mutilating school property such as arson, damage to windows, playground equipment, computers, etc. may result in the suspension (on-campus or home) or expulsion.

#### Profanity, Obscene Acts, Demeaning Racial Statements and Vulgarity

- a. These acts will be construed as an attack on the rights and privileges of other students who are attempting to receive an education and the rights of teachers to teach. Therefore, the attempt or act of projecting the above named actions whether on clothes, written, verbal or through gestures is in violation of school policy. The resulting disciplinary action will require: changing offensive clothing, work detail, on-campus suspension, home suspension, expulsion or a combination of any of these actions.

## Willful Disobedience

- a. Willful disobedience is the intentional defiance of Collegiate Leaders, faculty, and/or staff. Such action may be exhibited while coming to and from school, on the bus, during the normal school day or on fieldtrips. For the safety of the student and other students and the establishment of a nurturing learning environment, respect for faculty, staff, and parents is necessary. All students will come to understand this policy. It may take more time, patience and understanding to illuminate the younger children; however, student safety and a positive educational environment must be maintained. Therefore, timeout, work details, and on-campus suspension may be employed. Repeated disobedience may result in a request to have a student evaluated by other behavior professionals. Every attempt will be made to correct the in appropriate behavior before actions of home suspension and expulsion are considered.
- b. Students are expected to demonstrate good citizenship and act in a reasonable manner. Failure to do so will result in a reprimand, detention, Saturday work detail, after school work detail or suspension. Public displays of affection fall under this category.

## Sexual Harassment

- a. Prohibited sexual harassment includes, but is not limited to; unwelcome sexual advances, request for sexual favors, and other verbal, visual or physical conduct of a sexual nature.
  1. Submission to the conduct is explicitly or implicitly made a term or condition of an individual's employment, academic status or progress;
  2. Submission to or rejection of the conduct by an individual is used as the basis for academic or employment decisions affecting the individual;
  3. The conduct has the purpose or effect of having a negative impact on the individual's academic or work performance, or of creating an intimidating, hostile or offensive educational or work environment; and
  4. Submission to or rejection of the conduct by the individual is used as the basis for any decision affecting the individual regarding benefits and services, honors, programs, or activities at or through the school.
- b. Other types of conduct that are prohibited and may constitute sexual harassment include:
  1. Unwelcome leering, sexual flirtations or propositions;
  2. Unwelcome sexual slurs, epithets, verbal abuse, derogatory comments or sexually degrading descriptions;
  3. Graphic verbal comments about an individual's body, or overly personal conversation;
  4. Sexual jokes, stories, drawings, pictures or gestures;
  5. Spreading sexual rumors;
  6. Teasing or sexual remarks about students enrolled in a predominantly single-sex class;
  8. Cornering or blocking of normal movements;
  9. Displaying sexually suggestive objects in the educational environment; and
  10. Any act of retaliation against an individual who reports a violation of the school's sexual harassment policy or who participates in the investigation of a sexual harassment complaint.
  11. Purposefully limiting a student's access to educational tools; and
  12. Touching an individual's body or clothes in a sexual manner.

### Enforcement

The Head of School or his/her designee shall take appropriate actions to reinforce the board's sexual harassment policy. These actions may include:

1. Removing vulgar or offending graffiti;
2. Providing staff in-service training and student instruction or counseling; or
3. Taking appropriate disciplinary action to include reprimand, detention, on-campus suspension or home suspension.

### Act of Hate Violence

Causing, threatening, or attempting to cause or participate in an act of hate violence can be defined as willfully interfering with or threatening another person's personal or property rights because of race, ethnicity, national origin, religion, disability or sexual orientation. Speech that threatens violence, when the perpetrator has the apparent ability to carry out the threat, may be considered an act of hate violence. These offenses may call for reprimand, suspension, community service and/or expulsion.

### Other Harassment

Intentionally engaging in harassment, threats or intimidation against a student or group of students when the harassment is severe and pervasive and disrupts classes or creates disorder or an intimidating or hostile educational environment will not be tolerated. These offenses may call for a reprimand, suspension, community service and/or expulsion.

### Academic Dishonesty

Academic dishonesty is often a difficult concept to define. INVEST COLLEGIATE strives to increase a student's ability to work independently and collaboratively, while realizing this only clouds the issue of academic dishonesty. We realize that valuable social skills and learning come through group projects, collaboration, and cooperation.

Students should do as much of or all of their own homework, but students should be willing to give assistance to fellow students when the learning experience can be enhanced. In some situations, testing is required to be independent of any outside help. Students will be made aware of this and will be expected to act accordingly.

### Plagiarism

Plagiarism is a serious issue in academe. Students must give credit to the appropriate individuals for their research and writing. It is often difficult to distinguish what should be duly noted and what is common knowledge. It is the job of the faculty to bring this issue into a clearer focus for the students so that students will learn proper citation processes. Through their own research and writing, the constitution of plagiarism will become better defined for the student. Students will begin learning the principles and process of research and writing in early elementary school. Over the course of the year, older students will be using the APA system for documenting paraphrased and quoted material.

### Students with Disabilities

Students with disabilities may be suspended, in accordance with Federal legislation, for inappropriate behavior. The Head of School may suspend a student with disabilities for short-term suspension; suspension from school may not be for more than a total of fifteen days in a school year. The Head of School may recommend a student with disabilities for long-term suspension or expulsion (greater than 15 days) by following these procedures:

1. The Head of School will follow regular procedures for long-term suspension or expulsion as described above.
2. Once the Head of School has made a recommendation for long-term suspension or expulsion of a student with disabilities, he or she will convene members of the Student Support Team who will determine: if the student is eligible for special education services; if the student is appropriately placed in a special education program; and if there is a causal relationship between the student's disabling condition and the conduct for which he or she is to be disciplined.
3. The parent will be notified in writing of the time and place of the committee meeting and its purpose.

## Acceptable Computer Use Policy

### **Privileges**

INVEST COLLEGIATE provides Internet access for students and Collegiate Leaders. The Internet offers vast, diverse, and unique learning resources to students, families and educators. Computer and network-based technologies at INVEST COLLEGIATE, including Internet access, are provided to further educational goals and objectives. With access to computers and people all over the world, also comes the availability of material that may not be considered to be of educational value in the context of the school setting. INVEST COLLEGIATE will take precautions to restrict access to such materials. However, on a global network, it is impossible to control all materials and an industrious user may discover controversial information. We firmly believe that the valuable information and interaction available on this worldwide network far outweigh the possibility that users may procure material that is not consistent with the educational goals of the school.

### **Responsibilities**

The smooth operation of the network relies upon the proper conduct of the end users who must adhere to strict guidelines. These guidelines are provided here so that students and families are aware of the responsibilities they are about to acquire. Students and families are expected to abide by this Acceptable Computer Use Policy as well as all current local, state, and federal laws. If an INVEST COLLEGIATE student violates any of these provisions, he or she may lose any and all computer access privileges (including use for school work) for a period of time based on the severity of the violation and/or face other disciplinary consequences. Severe violations and/or violations of state or federal laws will incur more serious consequences in accordance with those policies of school and the law. The signatures on the Family Guidebook Acceptance form are legally binding and indicate the parties who signed have read the terms and conditions carefully and understand their significance.

### **Risks and Limitation of Liability**

The Internet serves as a powerful and essential educational tool. However, students and parents must be informed of the potential dangers that exist on the Internet, including (but not limited to) child/sexual predators, scam artists, and hate-biased materials. The INVEST COLLEGIATE school-based computer use policies

have been developed to protect against these dangers, and student use will be monitored by school staff to enforce these policies. In addition, data that track individual student Internet activity can be made available to parents upon request. Students are hereby warned against giving out any personal information over the Internet, including physical description or photo of self, name, age, address, school attended, or any times when the student will be home alone (including after school before parents have returned from work). Students should never meet one-on-one with someone they have met on the Internet without first seeking permission from their parent/guardian.

**Unlike home-based Internet usage which may be for entertainment and other purposes, Internet usage at INVEST COLLEGIATE is for educational purposes only. INVEST COLLEGIATE makes no warranties of any kind, whether expressed or implied, for the service it is providing. INVEST COLLEGIATE:**

- reserves the right to block or filter Internet content that has no educational purpose, is obscene, contains pornography, or is harmful to minors.
- makes no guarantee that the functions of services provided by or through the INVEST COLLEGIATE network will be error-free or without defect.
- will not be responsible for any damages a user may suffer including but not limited to loss of data, delays, non-deliveries, miss deliveries, or service interruptions caused by provider/user negligence, errors or omissions.
- is not responsible for the accuracy or quality of the information obtained through or stored in the system or network.
- will not be responsible for financial obligations arising through the unauthorized use of the system. Use any information obtained via the Internet at your own risk.

### **Cyber-bullying**

**Neither the school's network nor the broader Internet (whether accessed on campus or off campus, either during or after school hours) may be used for the purpose of harassment. All forms of harassment in cyberspace, often called cyber-bullying, are unacceptable.**

Cyber-bullying includes but is not limited to, the following misuses of technology: harassing, teasing, intimidating, threatening, or terrorizing another person by sending or posting inappropriate and hurtful e-mail messages, instant messages, text messages, digital pictures or images, or Web site postings (including blogs). Often the author (sender or poster) of the inappropriate material is disguised (logged on) as someone else.

Members of the INVEST COLLEGIATE community who feel that they have been the victims of such misuses of technology should not erase the offending material from the system. They should print a copy of the material and immediately report the incident to a school official (any Collegiate Leader or member of the Technology Staff). All reports of harassment in cyberspace will be investigated fully. Sanctions may include, but are not limited to, the loss of computer privileges, detention, suspension or expulsion from school.

### **Supervision and Monitoring**

School and network administrators and their authorized employees monitor the use of information technology resources to help ensure that uses are secure and in conformity with this policy. School leadership reserves the

right to examine, use, and disclose any data found on the school's information networks in order to further the health, safety, discipline, or security of any student or other person, or to protect property. They may also use this information in disciplinary actions, and will furnish evidence of crime to law enforcement.

### **Network Access Terms and Conditions**

A responsible student user of the INVEST COLLEGIATE Network:

- MAY USE the Internet to research assigned classroom projects.
- MAY USE the Internet to research/develop educational materials.
- UNDERSTANDS that NONE of his or her communications and information accessible through the Network is considered private or confidential.
- UNDERSTANDS that his or her Internet activity may be tracked and monitored and made available for parental review.
- UNDERSTANDS that INVEST COLLEGIATE Leaders may be silently observing his or her workstation and network activity at any time, and may intervene in the activity at any time.
- AGREES that he/she will NEVER disclose his or her password to any other student.
- AGREES to NEVER disclose his or her personal information or private information about another person over the Internet either by posting or by disclosing this information to another person met on the Internet.
- UNDERSTANDS that security on any computer system serving many users is critical, and it is the responsibility of all users to help safeguard the integrity of the system. This responsibility includes the reporting of any potential security breach such as unauthorized or prohibited use. If you feel you can identify a security problem on the network, you must notify a teacher or an administrator.
- UNDERSTANDS that if any provision of the Acceptable Computer Use Policy is violated, the student may not be allowed to use the network and disciplinary action may be taken.
- UNDERSTANDS that if he or she loses the privilege of using the network, there shall be no obligation to provide a subsequent opportunity to access the network. This means that the student may receive failing grades on subsequent in-school activities requiring network access.

### **Workstation Violations:**

**A student is to leave the computer exactly as he or she finds it unless given specific permission from an instructor. Prohibited changes include, but are not limited to**

1. Installing unauthorized software on any workstation or anywhere on the network
2. Logging on as another user or allowing another individual the use of one's account or user ID
3. Stealing, vandalizing or defacing hardware (including keyboards, monitors, and headphones).
4. Not reporting computer vandalism that you are aware of
5. Removing or replacing hardware or cables without authorization.

6. Changing the screensaver or desktop backgrounds of a lab or classroom computer.
7. Moving, adding, deleting, or changing icons on the desktop, including printer icons of a lab or classroom computer.
8. Setting themes or sounds; or changing the screen resolution of a lab or classroom computer.
9. Tampering with operational settings including the Start menu.

**Usage Violations:**

**Use of the computer must be in support of education and research and consistent with the educational objectives of INVEST COLLEGIATE. *The student is responsible, at all times, for its proper use.* Improper use of the network is prohibited. Uses of the network that are prohibited include, but are not limited to**

1. Use of school technologies in support of any illegal purposes.
2. Intentionally uploading, creating, or spreading computer viruses or worms.
3. Attempting to gain unauthorized access to the INVEST COLLEGIATE network, or any other network, or to
4. any secure data is considered hacking activity and thus is prohibited. Hacking activity includes students attempting to logon to the network/Internet as a faculty member or an administrator.
5. Possessing and/or using or attempting to use hacking tools, including keystroke loggers, wireless crackers, port scanners and password/encryption tools.
6. Not reporting a known potential security breach or vulnerability such as unauthorized or prohibited use.
7. Not reporting network security violations or potential violations that you are aware of. If you become aware of a problem, do not demonstrate the problem to other users.
8. Downloading and storing files on the network without authorization (as a student you are authorized to store only course-related documents in your home directory folder or as directed by An INVEST COLLEGIATE Leader).
9. Connecting any non-INVEST COLLEGIATE hardware (including personal laptops and PDA devices and cell phones) to the network without specific advance permission from Technology Staff.
10. Providing access to the INVEST COLLEGIATE network to unauthorized individuals via one's own account, another's account, or otherwise.
11. Using profanity, obscenity or language that is considered offensive or threatening. This includes retrieving, viewing, producing, posting, or sending (or attempting to post or send) material that
  - is profane, obscene, lewd, sexually explicit or suggestive or pornographic in purpose.
  - advocates or engages in illegal acts, threats, hate or violence.
  - potentially disrupts, causes damage, threatens or endangers students or staff.
12. Spamming: Distributing mass e-mail messages and chain letters or sending e-mail to school address lists or other large numbers of people or a large volume of messages to one or more individuals for the purpose of causing annoyance.
13. Posting personal or private information about yourself or other people on the Internet. Violating any aspect of a student's right to privacy by disclosing confidential information including but not limited to a student's grades or test scores.



14. Posting, sending, or disclosing over the Internet information that insults, defames, or harasses.
15. "Re-posting" or forwarding personal communications without the author's prior consent.
16. Chat rooms and instant messaging are off-limits during school hours except with prior specific permission. Arranging or agreeing to meet with a person you have met online without specific advance permission from a parent or teacher is prohibited.
17. Using INVEST COLLEGIATE technology to copy commercial software in violation of state, federal, or international copyright laws.
18. Using the INVEST COLLEGIATE network for financial gain or for the transaction of any business, commercial or lobbying activities.
19. Using technology to cheat; to misrepresent another's work as one's own or to pass one's work on to another for the purpose of cheating.
20. Plagiarizing (claiming another person's writings as your own) any information gained on or through the network or from the Internet. (This includes the downloading of reports or term papers purchased on the Internet and passing them off as one's own). INVEST COLLEGIATE will implement software that identifies plagiarized copy purchased by students over the Internet. NEVER SUBMIT ANY WORK THAT IS NOT YOUR OWN without proper attribution.

#### **Conduct Violations:**

**The use of the computer is a privilege, not a right, and inappropriate use will result in a cancellation of those privileges and severe disciplinary action. The school administrators will deem what is inappropriate use, based on the explicit and implicit guidelines in the Acceptance Computer Use Policy.**

1. You are expected to abide by the generally accepted rules of network etiquette. These include, but are not limited to, the following:
  - Do not be rude or abusive in your messages to others.
  - Use only appropriate language. Do not swear or use vulgarities or any other inappropriate or offensive language.
2. Using technology for off-task activities during class (playing games, videos, music, or visiting websites not instructionally related) is prohibited.
3. You may not visit chat rooms, bulletin boards, newsgroups or translator services at any time during class without your instructor's permission.
4. You may not instant message or check your email, or send email or chat messages during class unless your instructor gives you permission to do so.
5. You must report any unsolicited or inappropriate web site that pops up on your screen without your consent to your Collegiate Leader, technology leader, or school leadership.
6. If you experience any problems with your workstation (you can't log on, you can't print, you can't get on the network or to the Internet, your CD is stuck, etc.), you must report these problems to your

Collegiate Leader, technology leader, or school leadership.

7. It is your responsibility to keep your password confidential. IF YOUR PASSWORD IS COMPROMISED, YOU MUST CHANGE IT IMMEDIATELY! If you forget your password, see your Academic Leader who will help you create a new password. Choose a password you can easily remember. Your password must follow specific guidelines for a secure password. It must contain at least eight characters. It must also include a symbol, and a number. It may not contain all or part of your username. During the year, you will be required to change your password every 90 days to ensure the security of your account and your data. You may not use any previous passwords. You will be notified when your password is about to expire.

### **Consequences for Violations of Terms and Conditions**

**Workstation and Usage Violations** such as those listed above are SERIOUS violations with SEVERE consequences. Workstation and Usage violations can incur suspension of computer privileges as well as disciplinary action and including school suspension and notification of a student's parents. Reinstatement will require parental signature and/or conference.

**Conduct Violations** also have the consequence of disciplinary action which may include suspension of computer privileges. Repeated conduct violations will be treated as a serious violation (see above) and parents will be notified.

### **Academic Consequences of Violations**

Violations of the Acceptable Computer Use Agreement may carry serious academic consequences. If you lose your computer privileges, you may not use ANY INVEST COLLEGIATE computer. You may NOT bring a personal laptop to school to use for the duration of the violation. If you have access to the necessary hardware/software at home, you may complete computer-related assignments at home. Otherwise, you must complete your assignment at a public library or some other public computing facility. You may propose alternate, non-technology assignments to your Collegiate Leaders. Your Collegiate Leaders will decide whether your proposal constitutes an acceptable alternative for meeting the learning objectives of the original computer-based assignment. If there are no valid alternatives in computer-based courses, the result may be that you would fail the assignment.

The following applies to all violations:

1. If the school year ends before the computer suspension, the remainder of the suspension will carry over to the next school year.
2. Acts of vandalism that require the replacement of equipment will require financial recompense by the student or the student's parents.
3. Any violation of this agreement may result in additional disciplinary action in accordance with school policies, local, state and federal laws.

### **Dress Code**

The INVEST COLLEGIATE Uniform Policy is designed to provide students with the safest and most orderly learning environment possible. The uniform policy is in effect every school day, including any off-campus trips.

Advance notice will be publicized for any events which a specific uniform or events that do not require a uniform.

### ***Assistance/Amenities for Families***

INVEST COLLEGIATE is sensitive to the needs of families in meeting the uniform requirements. The parent or guardian of a student may contact the INVEST COLLEGIATE GUIDANCE counselor regarding requirements for financial assistance for uniforms.

### ***General Guidelines***

- No logo other than the INVEST COLLEGIATE logo may be worn.
- No jeans, jean skirts, jean jumpers or cargo pants of any type may be worn.
- Shirts must be tucked in at all times with the exception of the female shirts without a split at the bottom that are made to be worn on the outside of the waistband.
- A solid color t-shirt may be worn under the approved uniform shirt.
- Shorts, skirts, skorts, capris, culottes, and jumpers **must** reach the tip of the finger or longer when arms are at the sides.
- All uniform Oxford shirts may only have two buttons open at any given time.
- All clothing must fit appropriately (e.g. no tight or baggy clothing).
- All INVEST COLLEGIATE athletic t-shirts and sweatshirts are permissible.
- Athletic uniforms are not school attire.
- Brown/black belts must be purchased and worn for specific events.
- Shoes must be closed toe and closed heel. Lower School students are encouraged to wear tennis shoes. Brown/black dress shoes (flat heels) must be purchased and worn for specific events. No shoes with wheels are to be worn at any time.
- A student may wear one watch of his/her choice with the uniform during the school day.
- Earrings may be worn by students. They are restricted to one in each ear and may not exceed chin length. All other rings (e.g. tongue, toe, naval, eyebrow, and nose) may not be worn while students are in uniform or participating in school events.
- Prescription glasses are acceptable; please note on your student's health chart if he/she wears contact lenses or glasses.
- Sunglasses may not be worn inside the building or classrooms.
- Students are encouraged to keep their nails neat, trimmed, clean and sanitary.
- Due to potential allergic reactions please limit the use of perfumes or colognes.
- All hats/caps must be removed before entering the building.
- Hair accessories are acceptable as long as they do not become a distraction to the learning environment. If the accessories do become a distraction, the Academic Leaders reserve the right to ask students to place accessories in their backpacks or lockers. Students will not be permitted to wear unnatural hair coloring or accessories with false hair if they become a distraction to the learning environment.
- Rolling backpacks are not permitted.
- Lunchboxes should fit in the student's cubby or locker. Lunchboxes with vulgar or obscene pictures are prohibited.

## Non-Uniform Day Attire

*Non-Uniform Attire School Days are designated by the Head of School*

### Appropriate Dress for School:

1. Dresses, skirts, and shorts must be mid-thigh, finger-tip length, or longer.
2. All shirts must have distinctive sleeves with a shoulder seam.
3. All shirts must be able to be tucked in (even with hands extended above the student's head) and have either a collar or a neckline that is no more than one inch below the collar bone.
4. Clothing must cover all underwear.
5. Appropriate footwear must be worn at all times.
6. Pants that are free of holes and cover a student's underclothing.
7. All footwear must be closed toe/closed heel.

### Inappropriate Dress for School:

1. Clothing that exposes bare midriffs and bare backs.
2. T-shirts are that have advertisement/promotion of drugs, alcohol, tobacco products, depict prejudice, unlawful acts, obscene words/pictures, or anything else not appropriate for a school setting.
3. Pants worn that are excessively sagging, low cut, or have holes.
4. Pajamas or slippers.
5. Hats, bandanas, head wraps, or other head coverings.
6. Sunglasses or other eyewear not medically prescribed by a doctor.
7. Sheer or see through clothing.
8. Underclothing that is visible.
9. Studded bracelets, chains, or any objects worn that are considered dangerous.
10. Clothing that constitutes a health or safety hazard.
11. Sandals and flip-flops, swimsuits of any kind.

## Protection of Religious Expression

Students may display religious messages or artifacts (such as necklaces, bracelets, earrings, rings), but not on clothing. If wearing particular attire during the school day is part of a student's usual religious practice, under the Religious Freedom Restoration Act, the school will not prohibit the wearing of such items. Parents must discuss any potential situations with the Head of School.

## Non-Compliance

Students who choose not to comply with the Uniform Policy will be asked to remain in the school office until a parent/guardian is contacted to bring them a change of clothing. Students will be marked absent and responsible for any work missed while waiting on correct uniform attire to be brought to school. Parents are asked to be in concert with and enable faithful adherence to the dress code policy.

## Arrival and Departure

Between arriving on campus and departing campus, students must stay in the immediate vicinity of the school. When students arrive at school, they must enter the INVEST COLLEGIATE building. Students may not "hang out" in the school parking lot or in their vehicles before or after school. For the safety of students, access to the

parking lot during the day is limited to emergencies. Students must obtain permission from the office staff and a pass before going to the parking lot. Students may not leave campus once they have arrived to school without properly signing out through the school office.

Students may stay after school for athletics, club meetings, or extra help from a Collegiate Leader. Students remaining after school must be with at least two (2) members of the INVEST COLLEGIATE team at all times.

### Attendance

Attendance to class is critical for academic success. Students who are ill should remain at home to recover. However, parents and students should be aware that frequent absences often result in academic difficulties. We encourage scheduling of appointments and travel during non-school hours and scheduled breaks.

In case of an absence, parents/guardians should *call the school before 10 a.m. on the morning of the absence* in order to help insure the safety of our students. We would appreciate calls as early as possible so as not to unnecessarily burden our Administrative Associate. Upon returning to school he or she must turn in a note to the appropriate Administrative Associate from a parent or guardian explaining the absence. This written confirmation is necessary for state auditing purposes.

If a student plans to be absent for an educational opportunity, he or she should come to the office one week before the absence to be approved by an administrator. The administrator will provide the necessary information and expectations to the student.

The NC Department of Public Instruction considers absences for these reasons to be lawful:

- Illness or injury: When absence results from illness or injury which prevents the student from being physically able to attend school
- Quarantine: When isolation of the student is ordered by the local health official or the State Board of Health
- Death in the immediate family: When absences results from the death of a member of the immediate family of the student
- Medical or Dental appointments
- Court or administrative proceedings
- Religious observance
- Educational opportunity: approval must be granted by an administrator one week PRIOR to the absence.

### Compulsory Attendance Law Reporting

The Head of School will notify parents and take all other steps required by G. S. 115C-378 for excessive absences from school.

After a student has accumulated three unlawful absences, the Head or his/her designee shall notify the parent/guardian of the child's excessive absences. After not more than six unlawful absences, the Head shall notify the parent/guardian that he/she may be in violation of the Compulsory Attendance Law and may be

prosecuted if the absences cannot be justified under the established attendance policies of the state and the Board of Education. Once the parents are notified, the school social worker/counselor may work with the child and his/her family to analyze the causes of the absences and determine the steps to eliminate the problem. The school social worker may request that a law-enforcement officer accompany him/her if the counselor believes that a home visit is necessary.

After 10 accumulated unlawful absences in a school year, the Head of School will review any reports to or investigations produced by the school social worker pursuant to G. S. 115C-381. The Head/Dean shall confer with the student and his/her parent/guardian to determine whether the parent/guardian has been notified of the student's absences and has made a good faith effort to comply with the law.

If the Head of School determines that the parent/guardian has not met his/her obligations, the Head of School or designee may notify the district attorney and/or the director of social services of the county where the child resides. Evidence that shows that the parent/guardian was notified and that the child has accumulated 10 absences which cannot be justified under the Board's established attendance policies shall constitute a *prima facie* case that the child's parent/guardian is responsible for the absences. If the Head of School determines that the parent has met his/her obligations the Head may file a complaint with the juvenile court counselor indicating that the student is habitually absent from school without a valid excuse.

#### Lower School: Grades K - 5

Students at INVEST COLLEGIATE are required to be in attendance at least 94% of the school year in order to be in compliance with North Carolina Attendance Law for students between the ages of seven (or younger if enrolled) to be promoted to the next grade. A student absent more than ten days shall be referred to the Head of School for possible retention. Upon the fifth absence (lawful or unlawful) the Head of School will notify the parent of the school's concern and of interventions necessary for student success.

If the Head of School determines retention is necessary based on attendance, the parent/guardian will be notified in writing. The parent/guardian will have five days to appeal the Head of School's decision. Written documentation must be provided to the Head of School and must be based on appropriate reasons for the absences and completion of make-up work. If summer school attendance is determined to be appropriate.

#### Middle School: Grades 6 - 8

As an INVEST COLLEGIATE promotion standard, a middle school student may not miss more than 10 days of school a year or must be present more than 94% of the school year.

When a student has been absent for more than 10 day, he/she will be referred to the Head of School as a candidate for retention. The Head of School will notify the parent of the school's concern and will inform the parent of the attendance requirements in regard to the INVEST COLLEGIATE promotion standard.

If the Head of School determines retention is necessary based on attendance, the parent/guardian will be notified in writing. The parent/guardian will have five days to appeal the Head of School's decision. Written documentation must be provided to the Head of School and must be based on appropriate reasons for the absences and completion of make-up work.

Parents/Guardians who feel that extenuating circumstances have resulted in their child missing more than 10 days may request an attendance waiver through the school office. Waiver request forms must be completed at least three weeks before the end of the school year. The waiver period may be extended at the discretion of the Head of School who will review the waiver requests and determine if the student will receive course credit.

### Upper School: Grades 9 - 12

The *total* number of student absences for a school year cannot exceed ten (10) lawful or unlawful absences (6 for a semester-length course). If a student is absent from school and/or individual classes more than ten (10) times during the school year (whether lawful or unlawful) will receive a code of FF (future failure) and he/she will not receive credit for the course(s) unless the school office grants a waiver (6 for a semester-length course). Waiver request forms must be completed at least three weeks before the end of the school year. The waiver period may be extended at the discretion of the Head of School. An Attendance Appeal Committee will review the waiver requests and determine if the student will receive course credit.

### Late Arrival to School or Class

Tardiness has a negative impact not only on the tardy student's education, but also on that of his or her classmates. Students should make a point to arrive to class on time and to be ready to participate.

If students arrive at school after the signal for class to begin, they must provide a note from a parent or guardian explaining the tardiness and must sign-in in the office. Administrative Associates will give the student an admittance form to enter class. On the following day, students should show that form to any teacher whose class was missed.

If a student accumulates four tardies, those tardies will be considered equivalent to one absence. These absences will be counted toward the compulsory attendance policies previously noted.

### Early Departure

If students must leave school early, they should bring a note from a parent or guardian explaining the reason for the departure. This note should be given to the appropriate Administrative Associate upon arrival to school. The student/parent must then sign-out before leaving the building. The student/parent must sign back in if the student returns to school later the same day.

If a student gets sick during the school day and needs to leave school, the student should go to the office and call a parent or guardian. Administrative staff will speak to the parent or guardian before the student is allowed to sign-out.

### Completion of Assignments

Students are responsible for completing assignments when they are absent. Students should work with their Academic Partners to make arrangements to complete assignments, tests, and quizzes in a timely fashion. Students who are absent, or anticipate being absent for two or more days, should arrange to obtain assignments from their Collegiate Leaders at school or via email. When that arrangement is not possible,

students or parents may request assignments through the office. Students who have been suspended from school will not be permitted to make up missed work.

## TIMELINES

Please create and describe a detailed start-up plan, identifying major tasks, timelines, and responsible individuals for accomplishing those tasks.

### INVEST COLLEGIATE START-UP Plan

Acquisition of Facilities October 2011-September 2012

INVEST COLLEGIATE Board Member: Kate Alice Dunaway  
Tom Balke, LITTLE Diversified Architectural Consulting  
Bradford Noyes, Brailsford & Dunlavey

Renovation/Construction September 2012 – June 2013

INVEST COLLEGIATE Board Member: Kate Alice Dunaway  
Tom Balke, LITTLE Diversified Architectural Consulting  
Bryan Barwick, Barwick and Associates,

Campus Services September 2012 – June 2013

INVEST COLLEGIATE Board Member: Kari Jolly

Student Recruitment/Marketing July 2012 – June 2013

INVEST COLLEGIATE Board Members: Dr. Antoinette Ellison. Kari Jolly

Academic Leader Recruitment September 2012 – June 2013

INVEST COLLEGIATE Board Members: Kate Alice Dunaway, Dr. Antoinette Ellison

Curriculum and Professional Development Planning April – August 2013

INVEST COLLEGIATE Board Members: Kate Alice Dunaway, Dr. Antoinette Ellison,  
Carey Cannon, Katie Moske

**PRIVATE SCHOOL CONVERSIONS:** *complete ONLY if the proposed charter is a private school conversion.*

INVEST COLLEGIATE is **not** a private school conversion.

- Provide a detailed description of the existing private school's financial status. n/a
- Describe the rationale for converting from a private entity to a public school. Include information regarding how the proposed charter school will be nonsectarian in nature and will be open for all students (not just those currently attending the private school). n/a
- Depict and analyze the current enrollment trends of the school over the past three academic years. n/a
- Document and expound upon evidence that the existing private school is successful in student achievement. Base this explanation upon academic data available through summative assessments. n/a
- Explain the proposed charter school's expected staff turnover due to the statutory requirements for teacher licensure and highly qualified status. n/a



## VI. BUSINESS PLAN

### PROJECTED STAFF:

Provide a list of positions anticipated for the charter school; (e.g., principal or director; support staff; teachers, part-time and full-time; paraprofessionals/teaching assistants, clerical, and maintenance.).

#### INVEST COLLEGIATE 2013-1014

|                                |   |
|--------------------------------|---|
| Collegiate Leaders, Faculty    | Kindergarten – Grade Six                |
| Collegiate Leaders, Faculty    | Art, Music, Physical Education, Spanish |
| Associates, Faculty            |   |
| Exceptional Children’s Faculty |   |
| Head of School                 |   |
| Dean                           |   |
| School Guidance Counselor      |   |
| School Nurse                   |   |
| Facilities Manager             |   |

Discuss how the school will develop, mentor, retain, and evaluate staff in a format that matches the school’s mission and educational program.

INVEST COLLEGIATE strives to recruit and retain the highest caliber of professional for positions throughout the school community. The INVEST COLLEGIATE culture will reflect the school’s mission creating a highly desirable learning community for students and for teachers.

Lead Contacts: Kate Alice Dunaway, [kadunawayic@gmail.com](mailto:kadunawayic@gmail.com)  
Dr. Antoinette Ellison, Board Chair

Also include the following information for the proposed charter school:

- Process to advertise for and employ members of the school  
INVEST COLLEGIATE will utilize Teachers to Teachers.com; The National Charter Alliance for Charter Schools Jobs Board; and announcements via the INVEST COLLEGIATE website to post openings. Additionally, INVEST COLLEGIATE will participate in college career fairs throughout the region including and not limited to North Carolina, South Carolina, and Georgia.
- Description, if the proposed charter school partners with an EMO, of the relationship that will exist between the charter school employees and the management company.  
INVEST COLLEGIATE is not partnering with an EMO.

### QUALIFICATIONS REQUIRED FOR INDIVIDUAL POSITIONS: (G.S.115C-238.29F(e))

List the qualifications and appropriate licenses that each position must have to perform the job function(s). Describe the plan to meet the licensure requirements for teachers and paraprofessionals as prescribed by state law and No Child Left Behind. If individuals have already been identified for specific positions, please provide their qualifications and/or resumes in the appendices.

INVEST COLLEGIATE leaders will have previous experience in school administration. Teachers will be required to meet the standards set by North Carolina law of teachers in a charter school: 75% of teachers in Grades K-5 and 50% of teachers in Grades 6-12 must be licensed in the subject areas for which they are teaching. All teaching faculty will meet the standards as set forth in NCLB, which requires teachers in core subject areas to meet Highly Qualified standards. INVEST COLLEGIATE will utilize all measures to assist teachers and associate teachers to obtain licensure and certification including and not limited to lateral entry; National Board certification; and reciprocity agreements.

*SAMPLE POSITION DESCRIPTION:*

## INVEST COLLEGIATE Position Description

### I. Identifying Information

|                  |                           |
|------------------|---------------------------|
| Job Title:       | Teacher/Collegiate Leader |
| Department Name: | Invest Collegiate         |
| Reports to:      | Head of School            |

### II. Purpose of Position

The goal of the INVEST COLLEGIATE teacher is to visibly demonstrate the INVEST COLLEGIATE mission throughout the school and greater community in a professional manner with the highest regard for children, families, colleagues, and:

At INVEST COLLEGIATE, we imagine, we nurture, we value, we engage, we sustain, we transform as we champion opportunities in leadership and learning – embracing greatness, inspiring achievement within a telescopic environment.

### III. Tasks Performed

While every position at INVEST COLLEGIATE encompasses the six active domains; the following outcomes provide an overview of the expectations of teachers within the INVEST COLLEGIATE community:

- Design instruction appropriate for all students that reflects understanding of relevant content and is based on continuous and appropriate assessment.
- Create a classroom environment of respect and rapport that fosters a positive climate for learning, equity, and excellence.
- Promote student learning by providing responsive instruction that makes use of effective communication techniques, instructional strategies that actively engage student in the learning process, and timely, high-quality feedback.

- Fulfill professional roles and responsibilities and adhere to legal and ethical requirements of the profession.
- Understand the central concepts, tools of inquiry and structures of the discipline and be able to create learning experiences that made the subject matter meaningful to students.  
(UTeach, Holistic Evaluation Model, p.2)

The work performed by the Teacher includes, but is not limited to the following:

Transform through:

- an inviting and developmentally appropriate classroom environment to the standards outlined by INVEST COLLEGIATE.
- a developmentally appropriate curriculum in keeping with the North Carolina Standard Course of Study and The Core Knowledge Curriculum.
- pacing guides, thematic units, and learner-centered instruction outlining the daily, weekly, and yearly plans for the classroom, department and/or grade level.
- daily curriculum plans which thoughtfully reflect the educational needs and goals of the individual learner and the group.
- research-based strategies that are ground in higher order thinking, problem solving, and real world connections for all students.
- effective communication tools as specified by INVEST COLLEGIATE with colleagues, students, families, and others.

Nurture

- children by demonstrating the belief that all students are learners.
- colleagues by engaging in dynamic professional collaborations which support and encourage the entire INVEST COLLEGIATE community.
- children in developmentally appropriate ways.
- children through encouragement and positive interactions with students, families, and colleagues.
- oneself through self-reflection, educational dialogues, creative intellectual opportunities, and commitment to the mission of the INVEST COLLEGIATE community.

Lead

- by example.
- a minimum of one School Organization, Committee, or other group as selected in cooperation with the Leadership Team.
- through clear and appropriate communications with students, families, and stakeholders.
- by demonstrating appreciation to students, families, and stakeholders.
- by maintaining the attributes of an exemplary teacher.
- by maintaining a professional level of confidentiality regarding students, families, and colleagues throughout the school community.

## Engage

- in high-quality on-going professional development to strengthen knowledge and skill in the content of the teaching role.
- in the school community through active participation in programs, events, and opportunities as outlined by the Head of School.
- families as outlined by INVEST COLLEGIATE.
- in collaborative planning and problem-solving with colleagues.
- student's families in their educational program and respond in a timely and appropriate manner to their concerns.
- in the utilization of technology as available throughout the INVEST COLLEGIATE community.
- conversations which support the mission of INVEST COLLEGIATE.

The National Board for Professional Teaching Standards provides a detailed framework for the expectations of teaching professionals. INVEST COLLEGIATE expects all faculty, regardless of their level of education, experience, or job assignment, to carefully review these standards as they reflect the expectations of all members of the INVEST COLLEGIATE learning community.

### **ENROLLMENT and BUSINESS PLAN** (GS 115C.238.29F(g)(1-7))

Provide a plan indicating how the school will reasonably reflect the demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-238.29F(g)(5)).

Marketing to potential students and parents is vital to the survival of a charter school. Reaching the full capacity for enrollment will be critical to obtain the necessary financial resources to keep your school viable and operating efficiently. In addition, it is required by law that charter schools provide equal access to all students. Read the charter school State Statute regarding admissions GS 115C.238.29F(g) (1-7) carefully. Describe how the board will market the school to all populations (including various community ethnic groups, teachers and other employees, and the general public) to ensure that the school fully complies with the State Statute to mirror the diversity of the local education agency.

INVEST COLLEGIATE will market the charter school through the following:

Wilmore Community Association;  
Signage while Wilmore School is under renovation;  
Charlotte area radio announcements;  
Chamber of Commerce;  
Community Gatherings at local churches, community organization sites, and events;  
An outdoor event at the school site;  
Internet: INVEST COLLEGIATE web page;  
Announcements in newspapers and Charlotte area magazines; and  
Announcements on local television stations.

Information will be provided in English and in Spanish. Information will be provided throughout the communities located in the immediate (2 mile radius) of the school.

**The numbers in the following tables are projections, or estimates, and do not bind the State to fund the school at any particular level.**

*For the first two years the State will fund the school up to the maximum projected enrollment for each of those years approved in the projected enrollment tables. However, in subsequent years, the school may increase its enrollment only as permitted by G.S. 115C-238.29D(d), that is, an increase of 20% per year based on the previous year's enrollment. Any increase above 20% must be approved by the State Board of Education in accordance with G.S. 115C-238D(d).*

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. In describing your budgetary assumptions, explain the analysis utilized to project these specific enrollment figures. If your budget projections are lower than anticipated, how will the school adjust this budget and what is the determined break-even point for student enrollment?

Also, in narrative format, explain how your spending priorities align with the school's mission, curricular offerings, transportation plans, and professional development needs. Be able to depict in chart format and discuss in a narrative how the school will maintain a small, contingency reserve and operate using sound fiscal practices. As you construct the budget, include any and all documentation about cash on hand, bonds, real estate, or grants as part of this application package.

**PROJECTED ENROLLMENT  
2013-14 through 2017-2018**

IDENTIFY LEA FROM WHICH  
STUDENTS WILL PROBABLY COME

List LEA #1 – Charlotte-Mecklenburg Schools

List LEA #2 – \_\_\_\_\_

List LEA #3 – \_\_\_\_\_

| GRADES       | 2013-2014 |       |       | 2014-2015 |       |       | 2015-2016 |       |       | 2016-2017  |       |       | 2017-2018  |       |       |
|--------------|-----------|-------|-------|-----------|-------|-------|-----------|-------|-------|------------|-------|-------|------------|-------|-------|
|              | LEA 1     | LEA 2 | LEA 3 | LEA 1     | LEA 2 | LEA 3 | LEA 1     | LEA2  | LEA3  | LEA 1      | LEA2  | LEA3  | LEA 1      | LEA 2 | LEA 3 |
| Kindergarten | <u>80</u> | _____ | _____ | <u>80</u> | _____ | _____ | <u>80</u> | _____ | _____ | <u>100</u> | _____ | _____ | <u>105</u> | _____ | _____ |
| First        | <u>84</u> | _____ | _____ | <u>84</u> | _____ | _____ | <u>88</u> | _____ | _____ | <u>100</u> | _____ | _____ | <u>105</u> | _____ | _____ |
| Second       | <u>88</u> | _____ | _____ | <u>88</u> | _____ | _____ | <u>88</u> | _____ | _____ | <u>88</u>  | _____ | _____ | <u>105</u> | _____ | _____ |
| Third        | <u>88</u> | _____ | _____ | <u>88</u> | _____ | _____ | <u>88</u> | _____ | _____ | <u>88</u>  | _____ | _____ | <u>96</u>  | _____ | _____ |
| Fourth       | <u>72</u> | _____ | _____ | <u>88</u> | _____ | _____ | <u>92</u> | _____ | _____ | <u>92</u>  | _____ | _____ | <u>96</u>  | _____ | _____ |
| Fifth        | <u>72</u> | _____ | _____ | <u>72</u> | _____ | _____ | <u>92</u> | _____ | _____ | <u>92</u>  | _____ | _____ | <u>96</u>  | _____ | _____ |
| Sixth        | <u>74</u> | _____ | _____ | <u>80</u> | _____ | _____ | <u>96</u> | _____ | _____ | <u>110</u> | _____ | _____ | <u>120</u> | _____ | _____ |

PROJECTED ENROLLMENT 2013-14 through 2017-2018 (continued)

|                          |            | 2013-2014  |          |          | 2014-2015  |          |          | 2015-2016  |          |          | 2016-2017  |          |          | 2017-2018  |          |          |
|--------------------------|------------|------------|----------|----------|------------|----------|----------|------------|----------|----------|------------|----------|----------|------------|----------|----------|
|                          |            | LEA<br>1   | LEA<br>2 | LEA<br>3 | LEA<br>1   | LEA<br>2 | LEA<br>3 | LEA<br>1   | LEA<br>2 | LEA<br>3 | LEA<br>1   | LEA<br>2 | LEA<br>3 | LEA<br>1   | LEA<br>2 | LEA<br>3 |
| Seventh                  | 7          | —          | —        | —        | <u>80</u>  | —        | —        | <u>88</u>  | —        | —        | <u>96</u>  | —        | —        | <u>115</u> | —        | —        |
| Eighth                   | 8          | —          | —        | —        | —          | —        | —        | <u>80</u>  | —        | —        | <u>88</u>  | —        | —        | <u>96</u>  | —        | —        |
| Ninth                    | 9          | —          | —        | —        | —          | —        | —        | —          | —        | —        | <u>96</u>  | —        | —        | <u>105</u> | —        | —        |
| Tenth                    | 10         | —          | —        | —        | —          | —        | —        | —          | —        | —        | —          | —        | —        | <u>101</u> | —        | —        |
| Eleventh                 | 11         | —          | —        | —        | —          | —        | —        | —          | —        | —        | —          | —        | —        | —          | —        | —        |
| Twelfth                  | 12         | —          | —        | —        | —          | —        | —        | —          | —        | —        | —          | —        | —        | —          | —        | —        |
|                          | LEA Totals | —          | —        | —        | —          | —        | —        | —          | —        | —        | —          | —        | —        | —          | —        | —        |
| Overall Total Enrollment |            | <u>558</u> |          |          | <u>660</u> |          |          | <u>792</u> |          |          | <u>950</u> |          |          | 1,140      |          |          |

**Budget: Revenue Projections 2013-14 through 2017-2018**

| <b>INCOME:<br/>REVENUE PROJECTIONS</b>   | <b>2013-2014</b>      | <b>2014-2015</b>      | <b>2015-2016</b>      | <b>2016-2017</b>      | <b>2017-2018</b>      |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| --State ADM Funds  | <u>\$2,692,321.12</u> | <u>\$3,202,789.78</u> | <u>\$3,829,481.86</u> | <u>\$4,595,093.98</u> | <u>\$5,518,492.00</u> |
| --Local Per Pupil Funds  | <u>\$1,238,012.28</u> | <u>\$1,464,315.60</u> | <u>\$1,757,178.72</u> | <u>\$2,107,727.00</u> | <u>\$2,529,272.40</u> |
| --Federal Funds  | <u>\$0.00</u>         | <u>\$0.00</u>         | <u>\$0.00</u>         | <u>\$0.00</u>         | <u>\$0.00</u>         |
| --Grants*  | <u>\$0.00</u>         | <u>\$0.00</u>         | <u>\$0.00</u>         | <u>\$0.00</u>         | <u>\$0.00</u>         |
| --Foundations*   | <u>\$0.00</u>         | <u>\$0.00</u>         | <u>\$0.00</u>         | <u>\$0.00</u>         | <u>\$0.00</u>         |
| --Private Funds*   | <u>\$0.00</u>         | <u>\$0.00</u>         | <u>\$0.00</u>         | <u>\$0.00</u>         | <u>\$0.00</u>         |
| --Nutrition  | <u>\$20,000.00</u>    | <u>\$25,000.00</u>    | <u>\$30,000.00</u>    | <u>\$35,000.00</u>    | <u>\$40,000.00</u>    |
| <b>TOTAL INCOME</b>  | <u>\$3,950,333.40</u> | <u>\$4,692,105.38</u> | <u>\$5,616,660.58</u> | <u>\$6,737,820.98</u> | <u>\$8,087,764.40</u> |
| <p>*If you are depending on these sources of funding to balance your operating budget, please provide documentation, such as signed statements from donors, foundations, etc., on the availability of these funds.</p> |                       |                       |                       |                       |                       |



Budget (continued): Revenue Projections 2013-14 through 2017-2018

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

See <http://www.ncpublicschools.org/fbs/stats/index.html>  
(OR Click on: Agency Website: Division of Financial Services, Reports and Statistics, Statistical Data

*The formula for figuring these allotments can be found in the Resource Guide.*

State:  $\$4,360.65 \times 558 \text{ students} = \$2,433,242.70^*$

**This total does not include EC funding as shown in the state ADM revenue projections.**

Local (Mecklenburg, CMS):  $\$2,332.48 \times 558 \text{ students} = \$1,301,523.80^*$

\*State and local dollars provided in NCDPI Charter Resource Manual.

**Budget (continued): Expenditure Projections 2013-14 through 2017-2018**

MAY BE AMENDED AS THE NEEDS OF THE SCHOOL DICTATES.

| <b>BUDGET EXPENDITURE PROJECTIONS</b>       | <b>2013-2014</b> |                | <b>2014-2015</b> |                | <b>2015-2016</b> |                | <b>2016-2017</b> |                | <b>2017-2018</b> |                |
|---|------------------|----------------|------------------|----------------|------------------|----------------|------------------|----------------|------------------|----------------|
| <i>PERSONNEL</i>                            |                  |                |                  |                |                  |                |                  |                |                  |                |
| <i>Total # of staff and Projected Costs</i> | #42              | \$1,906,400.00 | #47              | \$2,315,650.00 | #60              | \$2,691,900.00 | #66              | \$2,943,150.00 | #42              | \$3,284,400.00 |
| --Administrator(s)                          | #2               | \$150,000.00   | #2               | \$150,000.00   | #3               | \$200,000.00   | #3               | \$200,000.00   | #3               | \$200,000.00   |
| --Clerical                                  | #2               | \$60,000.00    | #2               | \$60,000.00    | #3               | \$90,000.00    | #3               | \$90,000.00    | #3               | \$90,000.00    |
| --Teachers                                  | #32              | \$1,477,400.00 | #37              | \$1,866,650.00 | #45              | \$2,070,900.00 | #50              | \$2,300,150.00 | #56              | \$2,574,400.00 |
| --Librarians                                | #0               | \$0.00         | #0               | \$0.00         | #0               | \$0.00         | #0               | \$0.00         | #0               | \$0.00         |
| --Guidance                                  | #1               | \$45,000.00    | #1               | \$45,000.00    | #3               | \$135,000.00   | #3               | \$135,000.00   | #4               | \$180,000.00   |
| --Teacher Assistants                        | #2               | \$44,000.00    | #2               | \$44,000.00    | #3               | \$66,000.00    | #4               | \$88,000.00    | #5               | \$110,000.00   |
| --Custodian                                 | #1               | \$30,000.00    | #1               | \$30,000.00    | #1               | \$30,000.00    | #1               | \$30,000.00    | #1               | \$30,000.00    |
| --Maintenance                               | #0               | \$0.00         | #0               | \$0.00         | #0               | \$0.00         | #0               | \$0.00         | #0               | \$0.00         |
| --Food Service                              | #1               | \$60,000.00    | #1               | \$60,000.00    | #1               | \$60,000.00    | #1               | \$60,000.00    | #1               | \$60,000.00    |
| --Technology                                | #1               | \$40,000.00    | #1               | \$40,000.00    | #1               | \$40,000.00    | #1               | \$40,000.00    | #1               | \$40,000.00    |
| --Nurse                                     |                  |                |                  |                |                  |                |                  |                |                  |                |
| <br><i>EMPLOYEE BENEFITS</i>                |                  | \$621,433.20   |                  | \$743,931.83   |                  | \$866,521.35   |                  | \$962,548.78   |                  | \$1,070,648.00 |
| <i>STAFF DEVELOPMENT</i>                    |                  | \$12,000.00    |                  | \$15,000.00    |                  | \$18,000.00    |                  | \$21,000.00    |                  | \$24,000.00    |
| <i>MATERIALS AND SUPPLIES</i>               |                  | \$148,650.00   |                  | \$187,150.00   |                  | \$203,290.00   |                  | \$223,300.00   |                  | \$247,400.00   |
| <i>OFFICE SUPPLIES</i>                      |                  | \$12,000.00    |                  | \$12,000.00    |                  | \$12,000.00    |                  | \$12,000.00    |                  | \$12,000.00    |
| <i>INSTRUCTIONAL EQUIPMENT</i>              |                  | \$51,800.00    |                  | \$54,800.00    |                  | \$62,800.00    |                  | \$335,800.00   |                  | \$338,000.00   |
| <i>OFFICE EQUIPMENT</i>                     |                  | \$10,000.00    |                  | \$10,000.00    |                  | \$10,000.00    |                  | \$22,000.00    |                  | \$22,000.00    |

**Budget (continued): Expenditure Projections 2013-14 through 2017-2018**

| <b>BUDGET EXPENDITURE PROJECTIONS</b> | <b>2013-2014</b> | <b>2014-2015</b> | <b>2015-2016</b> | <b>2016-2017</b> | <b>2017-2018</b> |
|---------------------------------------|------------------|------------------|------------------|------------------|------------------|
| <i>TESTING MATERIALS</i>              | \$2,500.00       | \$3,600.00       | \$5,000.00       | \$5,000.00       | \$5,000.00       |
| <i>INSURANCE</i>                      | \$20,000.00      | \$20,000.00      | \$20,000.00      | \$20,000.00      | \$20,000.00      |
| <i>UTILITIES</i>                      | \$94,500.00      | \$103,500.00     | \$108,150.00     | \$116,000.00     | \$123,000.00     |
| <i>RENT and (Debt Service)</i>        | \$604,518.97     | \$614,418.97     | \$734,518.97     | \$650,00.00      | \$700,000.00     |
| <i>MAINTENANCE &amp; REPAIR</i>       | \$147,500.00     | \$151,000.0      | \$164,500.00     | \$168,000.00     | \$196,500.00     |
| <i>TRANSPORTATION</i>                 | \$15,000.00      | \$15,000.00      | \$20,000.00      | \$22,000.00      | \$25,000.00      |
| <i>MARKETING</i>                      | \$5,000.00       | \$5,000.00       | \$5,000.00       | \$5,000.00       | \$5,000.00       |
| <i>FOOD/CAFETERIA SUPPLIES</i>        | \$20,000.00      | \$25,000.00      | \$30,000.00      | \$35,000.0       | \$40,000.00      |
| <i>CONTRACTED SERVICES</i>            | \$224,400.00     | \$262,600.00     | \$298,520.00     | \$312,600.00     | \$317,400.00     |
| <b>TOTALS</b>                         | \$3,895,702.17   | \$4,538,650.80   | \$5,250,200.32   | \$5,853,398.78   | \$6,431,148.00   |

**BUDGET NARRATIVE:** Please include additional information that showcases all assumptions for your budgetary calculations. For instance, you may start the first year with 10 teachers but plan to add 2 teachers each year. The increase may be seen in the budget; however, the specific assumptions are missing beyond the projected first year. Use this space to explain, in depth, your budget calculations for years 2 through 5.

The INVEST COLLEGIATE budget represents a realistic summary of the school's finances in 2013-2014 with the expected growth in subsequent years due to adding one grade per year through Grade 12. Because of the partnership with Barwick Associates, LLC. for the facility, INVEST COLLEGIATE's budgets represent sound financial planning based on the experiences of INVEST COLLEGIATE Board members who have opened and operated North Carolina Charter Schools in conjunction with the expertise of Acadia-NorthStar. Following the first year of operation, the budget reflects the addition of personnel to meet the needs of the additional grade level.

The opportunity to add additional space in year three has been discussed with the landlord and planning for any additional space, only on the current site, will begin in year two following the first successful year.

## ***WORKING CAPITAL and/or ASSETS ON DATE OF APPLICATION***

|                         |               |
|-------------------------|---------------|
| Cash on Hand            | \$0.00        |
| Certificates of Deposit | \$0.00        |
| Bonds                   | \$0.00        |
| Real Estate             | \$0.00        |
| Capital Equipment       | \$0.00        |
| Motor Vehicles          | \$0.00        |
| Other Assets            | \$0.00        |
| <b>TOTAL</b>            | <b>\$0.00</b> |

### **SCHOOL AUDITS:**

PROGRAM AUDITS: GS 115C-238.29B(b)(6)

Describe the procedure and method for evaluating the overall effectiveness of the proposed charter school program as related to the mission of the school.

At INVEST COLLEGIATE, we **imagine**, we **nurture**, we **value**, we **engage**, we **sustain**, we **transform**; as we champion opportunities for leadership and learning—embracing greatness, inspiring achievement within a telescopic environment.

**Imagination** means being able to envision a theory, concept or idea or considering a way of doing something that has not been done. **Imagination** can mean putting different things together to create something new or developing a new process. Students at Invest Collegiate will have the opportunity to develop and test innovative ideas. They will also have the opportunity to frame, analyze and solve problems. While **imagination** is a difficult concept to measure, students will have an opportunity to demonstrate their **imagination** by creating something new.

Social intelligence describes the exclusively human capacity to effectively navigate and negotiate complex social relationships and environments. People with high social intelligence have a good understanding of others and are able to effectively interact with others. They are able to develop and **nurture** positive relationships, ideas and processes. At Invest Collegiate, students will have an opportunity to develop their social intelligence. They will have the opportunity to demonstrate their capacity to **nurture** relationships, ideas and processes.

It is important for individuals to develop a sense of **value**. Without a sense of **value**, individuals can develop a sense of insecurity and lack motivation. It is important for children to develop this sense as early as possible. At Invest Collegiate students will have an opportunity to explore their aptitude and interests. Students will have an opportunity to focus on their strengths and develop an understanding of their purpose. Students will not only discover their own **value**, they will have an opportunity to develop a clearer sense of what's most important to them in life. Students will be encouraged to discover their natural talents and to hone those talents, abilities and skills. Students will have an opportunity to demonstrate their value in an exit project in 5<sup>th</sup> and 8<sup>th</sup> grade.

In the world of social networking, it is easier than ever to **engage**. While the quantity of **engagement** has increased over time, the quality of **engagement** has suffered. Invest Collegiate is committed to helping students improve the quality of their **engagement**. At Invest Collegiate, students will be required to be actively **engaged** in their education, their school and the community. Invest Collegiate students will have an opportunity to collaborate with students and staff to reach their educational goals. Students will choose their own path to **engage** in the school community through extracurricular clubs and leadership opportunities. Students will be required to **engage** with the community to complete community service hours.

**Sustainability** is based on a simple principle: Everything that we need for our survival and well-being depends, either directly or indirectly, on our natural environment. **Sustainability** is important to making sure that we have and will continue to have, the water, materials, and resources to protect human health and our environment. **Sustainability** is the capacity to endure. For humans, **sustainability** is the long-term maintenance of responsibility, which has environmental, economic, and social dimensions, and encompasses the concept of stewardship, the responsible management of resource use. Invest Collegiate will provide an opportunity for students to learn the principals of **sustainability**. They will begin to create a lifestyle of **sustainable** living that reduces their carbon footprint.

At Invest Collegiate, students will have the exciting opportunity to **transform** and to be **transformed**. Students will have the opportunity to explore concepts, processes, organizations and technology in all curriculum areas. Students will be challenged to examine their view of the world and not only change their point of view, but rather develop a whole different perception of what is possible. Students will be challenged to expand their view of the world in order to appreciate different perspectives and to consider two perspectives simultaneously. Students will have the opportunity to demonstrate evidence of their **transformation**.

**FINANCIAL AUDITS:** GS 115C-238.29F(f)(1)

Describe the procedure and method for conducting an independent financial audit for the proposed charter school. Give the name of the firm approved by the NC Local Government Commission (GCC) that will conduct the audit. Include the complete mailing address, telephone number and fax number.

Invest Collegiate will utilize Petway, Mills & Pearson, P.A. for an independent financial audit. This firm conducts the audits for charter schools throughout North Carolina and remains current and familiar with NC Charter Schools. The contact information is as follows:

**Zebulon Office**

PO Box 1036  
1014 North Arendell Avenue  
Zebulon, NC 27597  
Phone (919) 269.7405  
Fax (919) 269.8728

**Raleigh Office**

5116 Bur Oak Circle  
Raleigh, NC 27612  
Phone (919) 781.1047  
Fax (919) 781.1052

CIVIL LIABILITY AND INSURANCE (GS 115C-238.29F(c))

State the proposed coverage for:

|   |   |
|---|---|
| Comprehensive General Liability             | \$1,000,000.00/\$3,000,000.00                       |
| Officers and Directors/Errors and Omissions | \$1,000,000.00/\$2,000,000.00                       |
| Property Insurance                          | \$11,000,000.00 Building<br>\$3,000,000.00 Contents |
| Motor Vehicle Liability                     | \$1,000,000.00                                      |
| Bonding                                     | \$250,000.00  |
| Minimum amount:                             | \$250,000.00  |
| Maximum amount:                             | n/a   |
| Other                                       | n/a   |

***If you, as an applicant, have already received quote from an insurance organization, please provide a copy within the appendices.***

*See Resource Manual for Minimums allowed by SBE Policy.*

**TRANSPORTATION** (G.S. 115C-238.29F(h))

Describe in detail the transportation plan that will ensure that no child is denied access to the school due to lack of transportation.

INVEST COLLEGIATE will be located in the heart of the Charlotte-metro corridor. The building is located at the center of the East Boulevard-West Boulevard corridor through the heart of Charlotte. Transportation will not be a barrier to student attendance at INVEST COLLEGIATE. INVEST COLLEGIATE is committed to meeting the diverse needs of students in a unique educational setting. The students at INVEST COLEGIATE will represent the student population in the county. CATS transportation provides numerous routes throughout the East-West corridor. In addition, a small passenger bus will be utilized, for student transportation as needed within a one-mile radius of the school, similar to the CATS Village Rider community connectors currently serving areas of Mecklenburg County beyond the Charlotte-metro area. INVEST COLEGIATE is committed to enrolling a broad representation of the population in the Charlotte Mecklenburg area. In order to honor this commitment, approximately 1% of the revenue per student budget will be committed TO anticipated transportation needs of low income students. No student will be denied access to the school due to lack of transportation.

**FACILITY** (GS 115C-238.29D(c))

Describe the facility in which the school will be located. Include information on how the site is appropriate to your instructional program. 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 facility and has provided a valid Certificate of Occupancy for Educational use to The Office of Charter Schools.

Name of the facility (if known): The Wilmore School

Address: West Boulevard

City/State/Zip: Charlotte, North Carolina 28203

Description of the Facility:

|                       |                                   |
|-----------------------|-----------------------------------|
| Total square feet:    | approximately 45,000 square feet  |
| Number of Classrooms: | 24                                |
| Number of Restrooms:  | 4 (four) prior to renovation      |
| Other Rooms:          |                                   |
| Auditorium:           | 1 (one)                           |
| Gymnasium:            | 2 (multipurpose rooms/classrooms) |
| Music Room:           | n/a                               |
| Art Room:             | n/a                               |
| Laboratory:           | n/a                               |

Ownership:  Fee Simple or  Lease

If the facility is to be leased, provide the following information:

- (a) Term of the Lease: Ten (10) year lease beginning August 2013.
- (b) Type of Lease: Traditional
- (c) Rent: approximately \$41,000.00 per month August 2013 – June 2014



Name of Landlord: Bryan Barwick

Address: 704 East Boulevard, Suite 100

City/State/Zip: Charlotte, North Carolina 28203

Phone: 704-333-3317

Fax: 704-344-0808

Document inspections for the following:

- (a) Fire: CMS currently owns/operates the facility for CMS professional development.
- (b) Safety: CMS currently owns/operates the facility for CMS professional development.
- (c) Handicapped accessibility? CMS currently owns/operates the facility for CMS professional development.

The entire facility will be renovated for the sole purpose of housing INVEST COLLEGIATE. We acknowledge the requirement for all fire, health, safety and building inspections prior to receiving the Certificate of Occupancy and prior to moving furnishings or beginning classes in the facility.

## Barwick & Associates, LLC

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April 3, 2012

Bryan Barwick  
Barwick & Associates, LLC  
704 East Blvd. Suite 100  
Charlotte, NC 28203

Subject: Facility Development for INVEST COLLEGIATE at Wilmore

The purpose of this letter is to share my plans on a collaborative effort with INVEST COLLEGIATE to provide for a public charter school in the Wilmore community. Wilmore is part of the Charlotte South End area light rail corridor. Barwick & Associates, LLC, which is located within minutes of the historic Wilmore school site, specializes in historic preservation, restoration and renovation projects. Recent preservation award winning projects by the company include: 1) The Old Cotton Factory in Rock Hill, SC 2) The Citizens Bank Building in Rock Hill, SC 3) The Palmer Fire School in Charlotte, NC.

Located in the historically designated neighborhood of Wilmore the historic Wilmore School was built in 1925 with several additions being added over time. My planning, which has included site and building analysis by architects, general contractors, structural engineers, mechanical contractors etc. indicates the building is structurally sound and suitable for educational opportunities.

The restoration and renovation of this facility for educational purposes is in keeping with Charlotte Mecklenburg Schools goals and the Wilmore community. The Wilmore School is currently utilized by CMS for their professional development center for incoming and current teachers and staff. Because CMS is relocating these professional development programs to other facilities I am proposing the Wilmore School be completely renovated and returned to its original usage as an opportunity for the advancement of student education.

At the writing of this letter, I have outlined a preliminary proposal and lease structure with INVEST COLLEGIATE. INVEST COLLEGIATE would lease the facility from Barwick & Associates, LLC on an ongoing basis. Our project team is aware of the application timeline, the time frame for opening the school, and the necessary facility requirements for a public charter school. LITTLE Diversified Architectural, a Charlotte firm with extensive expertise and knowledge in school facilities will provide architectural and project guidance throughout the redevelopment process.

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704 East Boulevard, Suite 100 Charlotte, NC 28203  
Phone: (704) 333-3317 • Fax: (704) 344-0808

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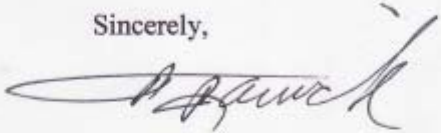
Barwick & Associates, LLC

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I appreciate your consideration of INVEST COLLEGIATE at Wilmore and the exciting opportunities created by restoring and renovating a historically significant school for both students and the Wilmore community at large.

Sincerely,



704 East Boulevard, Suite 100 Charlotte, NC 28203  
Phone: (704) 333-3317 • Fax: (704) 344-0808

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**The Wilmore School**  
 First Floor Plan  
 0 16 24  
**LITTLE** 03.08.2012



**The Wilmore School**  
 Second Floor Plan

0 16 24

**LITTLE** 03.08.2012

Describe how the maintenance will be provided for the facility.

INVEST COLLEGIATE is responsible for all on-going daily maintenance and upkeep of the facility. The landlord, as discussed during preliminary meetings and per the lease agreement, will be responsible for maintaining all systems including and not limited to the following: HVAC, Roofing, Plumbing, Security Systems, Electrical, and other as specified in the lease agreement (to be determined).

Describe the method of finding a facility if one is not readily available at this time including information about the spatial needs of the school to best suit your adopted educational program and instructional methodologies. Does the applicant have a facility contingency plan should their initial efforts not be successful?

INVEST COLLEGIATE evaluated, with realtors, developers and LITTLE Diversified architects, five sites which are available for lease and/or lease purchase within the Charlotte metro-corridor and within 1 (one) to 3 (three) miles of the Wilmore location. INVEST COLLEGIATE plans to move forward with the historic Wilmore location, however, the other sites provide viable options should a change become necessary.

#### **HEALTH AND SAFETY REQUIREMENTS** (G.S. 115C-238.29F(a))

Describe how the school plans to adhere to the requirements of the health and safety laws and regulations of the federal and state governments. Address how the proposed charter school will meet the following requirements:

- Safety

INVEST COLLEGIATE is committed to the health, safety, and well-being of all children and employees. INVEST COLLEGIATE will train staff and provide all necessary measures to meet required State and Federal health and safety laws and regulations. INVEST COLLEGIATE will have an emergency response plan. All employees will be trained in safety policies.

- Immunization of Students

North Carolina students are required by law to have certain immunizations prior to attending school. The school will work to ensure parent/guardian compliance with all required immunizations. The school has the responsibility to ensure that enrolled students meet immunization requirements. INVEST COLLEGIATE is aware that a person's religious beliefs may be sufficient for an exemption of this requirement.

- Fire and Safety Regulations

INVEST COLLEGIATE will meet all building and furnishings codes for fire and safety regulations. The Head of School will schedule and conduct monthly Fire Drills as required and all students and employees will be informed and trained regarding Fire Drill procedures.

- Food Inspections

INVEST COLLEGIATE will comply with the regulations set by the Department of Health and Human Services, Mecklenburg County, for food purchases, preparations, serving, and disposing of food and food products. The school will meet with the local health inspector to ensure compliance with all regulations in this regard.

Over fifty (50) restaurants are located within a two (2) mile radius of the school. INVEST COLLEGIATE will work with local restaurants to provide healthy affordable lunches for all students including those who qualify for free or reduced lunch.

Local restaurants: Bad Daddy's Burger Bar, Ru Sans, Mama Ricotta's, Cantina 1511, 300 East, Fiamma, 131 Main, Zen Asian Fusion, Lebowski's Neighborhood Grill, Kabob Grill, Comet Grill, Dolce Restaurant, Brixx Wood Fired Pizza, Dilworth Neighborhood Grille, East Boulevard Grill, Art's Barbecue and Deli, Outback Steakhouse, Shomars, Wok Express Chinese Food, Great Harvest Bread, Queen City Pizza Depot, Boardwalk Billy's, Just Fresh, Pizza Hut, Something Classic Café, Toast Café, Moe's Southwest Grill, Riccio's Pizza Villa, Harper's Restaurant, Nonna's Kitchen, The Original Italian Pie, Philadelphia Deli, Berrybrook Farm Natural Foods, The Italian Pie.

- Hazardous Chemicals

INVEST COLLEGIATE will inform and train all employees regarding hazardous chemicals and implement employee protection programs. OSHA's Hazard Communication Standard applies to schools because all workers may use or be exposed to hazardous chemicals. All hazardous chemicals will be kept away from students.

- Bloodborne Pathogens

INVEST COLLEGIATE will act in accordance with OSHA's Blood-borne Pathogen Standard to establish an exposure control plan to minimize workplace risks.

- Diabetes care plans

INVEST COLLEGIATE School Nurse will develop and implement a Diabetes Care Plan with in-service training for all employees. Additionally, students in Grades 5 -12 will participate in a seminar conducted by the School Nurse to outline the Diabetes Care Plan to develop an understanding and awareness by students within the school community.

- Providing students in grades 9-12 with information on how a parent may lawfully abandon a newborn

In accordance with GS 7B-500, INVEST COLLEGIATE will annually provide students in Grades 9 through 12 with information regarding how a parent may lawfully abandon a newborn. The Guidance Counselor and School Nurse will plan and implement the protocol for sharing this information. This protocol will remain on file in the school office.

- Providing parents and guardians with information about:

- Meningococcal meningitis and influenza and their vaccines at the beginning of each year

In accordance with GS 115C-238.29F, INVEST COLLEGIATE will annually (at the beginning of the school year) ensure that materials are provided to parents and guardians with information about meningococcal meningitis and influenza. This information will include the causes, symptoms, and how meningococcal meningitis and influenza are spread and the places where parents and guardians may obtain additional information and vaccinations for their children. The School Nurse, at the direction of the Head of School, will be responsible for planning and distributing materials/information in accordance with GS 115C-238.29F.

- Cervical cancer, cervical dysplasia, human papillomavirus, and the vaccines available to prevent diseases

INVEST COLLEGIATE will ensure that materials are provided to parents and guardians with information about cervical cancer, cervical dysplasia, human papillomavirus, and the vaccines available to prevent these diseases. This information will include the causes and symptoms of these diseases, how they are transmitted, how they may be prevented by vaccination, including the benefits and possible side effects of vaccination, and the places where parents and guardians may obtain additional information and vaccinations for their children. The School Nurse, at the direction of the Head of School, will be responsible for planning and distributing materials/information regarding the vaccines available to prevent these diseases.

## VII. LEA IMPACT STATEMENT

Pursuant to G.S. 115C-238.29B(d), the charter school applicant must submit a copy of the application to the LEA in which the school will locate within seven days of the submission of the application to the Office of Charter Schools. Applicants are encouraged to submit their application to the LEA first so that proof of submission can be included in the complete application packet. The LEA may then submit information or comment directly to the Office of Charter Schools for consideration by the State Board of Education.

Please attach to this application a return receipt, or other documentation, verifying the applicant's timely submission of a copy of this application to the LEA.

*Please note the attached receipt which verifies the UPS Tracking Number for the delivery of the INVEST COLLEGIATE application to the Charlotte-Mecklenburg Local Education Agency.*

## VIII. APPENDICES (OPTIONAL)

You may include numbered and indexed appendices to provide additional information that you believe will assist the State Board of Education in the consideration of your application.



Appendix I  
CMS Student Demographics

| School                           | African American | Caucasian | Hispanic | Asian | American Indian | Multi-racial |
|----------------------------------|------------------|-----------|----------|-------|-----------------|--------------|
| Albemarle Road Elementary        | 47.9             | 4.3       | 41.6     | 2.2   | .2              | 3.7          |
| Albemarle Road Middle            | 53               | 7.2       | 33.2     | 4.1   | .2              | 2.2          |
| Alexander Graham Middle          | 27.3             | 62.4      | 6.3      | .8    | .5              | 2.7          |
| Alexander Middle                 | 52.7             | 27.9      | 10.1     | 4.8   | .4              | 4.1          |
| Allenbrook Elementary            | 62.2             | 5.7       | 14.6     | 11    | 1.4             | 5            |
| Audrey Kell Elementary           | 12.6             | 68.5      | 7.1      | 9.2   | .6              | 1.9          |
| Ashley Park Elementary           | 91.3             | 4.7       | .7       | .4    | 0               | 2.9          |
| Bailey Middle                    | 10               | 77.7      | 7        | 2     | .5              | 2.9          |
| Bain Elementary                  | 9.3              | 78.1      | 5.2      | 2.9   | .5              | 4.1          |
| Barringer Elementary             | 76.6             | 10        | 3.1      | 5.9   | .5              | 3.9          |
| Berry Hill Elementary            | 17.7             | 26.2      | 40.5     | 6.8   | .8              | 8.1          |
| Beverly Woods Elementary         | 14.1             | 75.2      | 5.1      | 2.5   | 0               | 3.1          |
| Billingsville Elementary         | 62.4             | 3.9       | 24.3     | 7.5   | .2              | 1.7          |
| Bishop Spaugh Middle             | 86               | 3.3       | 4.4      | 3.5   | .2              | 2.7          |
| Blythe Elementary                | 31.1             | 44.7      | 15.9     | 2.9   | .1              | 5.2          |
| Bradley Middle School            | 27.5             | 58.6      | 7.7      | 2.8   | .7              | 2.7          |
| Briarwood Elementary             | 58.7             | 1.6       | 34.4     | 1.6   | .5              | 3.2          |
| Bruns Avenue Elementary          | 84.5             | 1.3       | 6.2      | 2.8   | 2.2             | 3            |
| Butler High                      | 19.7             | 68.4      | 5.3      | 4.7   | .4              | 1.5          |
| Carmel Middle                    | 19.2             | 60.4      | 13.5     | 3.9   | .3              | 2.7          |
| Cato High                        | 38.6             | 28.1      | 19.3     | 8.8   | 1.8             | 3.5          |
| Chantilly Elementary             | 39.1             | 47.6      | 3.6      | 3.1   | .4              | 6.2          |
| Clear Creek Elementary           | 28.1             | 52.8      | 10.4     | 1.8   | .3              | 6.6          |
| Cochrane Middle                  | 69.4             | 3.4       | 20.9     | 2.8   | .4              | 3.0          |
| Collinswood Elementary           | 12.1             | 18.8      | 59.4     | 1.1   | .2              | 8.3          |
| Community House Elementary       | 12.5             | 67.3      | 8.7      | 8.5   | .4              | 2.6          |
| Cornelius Elementary             | 8.8              | 71.6      | 11.0     | 3.0   | .5              | 5.0          |
| Cotswold Elementary              | 38.1             | 45.3      | 11.1     | 1.4   | .2              | 3.8          |
| Coulwood Middle                  | 59.8             | 20.8      | 11.2     | 3.8   | 1.0             | 3.5          |
| Crestdale Middle                 | 16.3             | 69.7      | 4.8      | 5.9   | .3              | 2.9          |
| Crown Point Elementary           | 28.1             | 43.7      | 17.3     | 4.8   | .4              | 5.7          |
| David Cox Elementary             | 48.4             | 29.5      | 9.3      | 5.9   | .8              | 6.0          |
| Davidson Elementary              | 5.5              | 85.7      | 3.1      | 1.7   | .5              | 3.5          |
| Devonshire Elementary            | 57.3             | 1.4       | 35.0     | 3.3   | .3              | 2.6          |
| Dilworth Elementary              | 67.6             | 19.0      | 7.6      | .2    | 1.0             | 4.5          |
| Druid Hills Elementary           | 79.8             | 0         | 11.3     | 4.6   | .2              | 1.2          |
| Waddell High                     | 57.8             | 8.9       | 29.3     | 2.3   | .3              | 1.4          |
| East Mecklenburg                 | 46.9             | 30.8      | 13.9     | 5.8   | .1              | 2.5          |
| Eastover Elementary              | 20.0             | 73.7      | 2.5      | 1.7   | 0               | 2.1          |
| Eastway Middle                   | 46.4             | 7.0       | 36.1     | 8.3   | .3              | 1.9          |
| Elizabeth Lane Elementary        | 7.4              | 78.4      | 3.3      | 8.2   | .2              | 2.6          |
| Elizabeth Traditional Elementary | 54.2             | 37.3      | 2.6      | 2.6   | .6              | 2.8          |
| Elon Park Elementary             | 6.6              | 66.4      | 7.1      | 14.9  | 0               | 5.0          |
| Endhaven Elementary              | 10.8             | 71.7      | 4.4      | 8.3   | .3              | 4.4          |
| First Ward Elementary            | 94.3             | .6        | 1.0      | .8    | 1.0             | 2.4          |
| Garringer High                   | 68.7             | 6.3       | 19.4     | 4.7   | .3              | .5           |
| Greenway Park Elementary         | 44.2             | 21.2      | 23.5     | 4.0   | .6              | 6.5          |
| Harding High                     | 86.7             | 4.3       | 2.5      | 5.1   | .7              | .7           |
| Hawk Ridge Elementary            | 10.2             | 64        | 5.8      | 14.2  | .5              | 5.3          |
| Hickory Grove Elementary         | 49.8             | 5.5       | 38.5     | 2.3   | .5              | 3.3          |
| Hidden Valley Elementary         | 59.3             | .2        | 36.7     | 1.3   | 0               | 2.5          |

|                                     |      |      |      |      |     |     |
|-------------------------------------|------|------|------|------|-----|-----|
| Highland Elementary                 | 26.2 | 58.6 | 5.3  | 4.2  | .1  | 5.5 |
| Hopewell High                       | 36.9 | 51.2 | 6.5  | 2.7  | .8  | 1.9 |
| Hornet's Nest Elementary            | 62   | 5.9  | 25.7 | 2.1  | .9  | 3.4 |
| Huntersville Elementary             | 9.9  | 74.8 | 10   | 1.2  | .2  | 3.8 |
| Huntingtowne Elementary             | 34.4 | 16.5 | 41   | 3.3  | .2  | 4.7 |
| Idewild Elementary                  | 50.8 | 9.2  | 31.9 | 4.4  | .3  | 3.5 |
| Independence High                   | 60.7 | 16.7 | 17.1 | 2.9  | .4  | 2.2 |
| Irwin Elementary                    | 85.0 | 2.2  | 6.6  | .9   | 1.8 | 3.5 |
| JH Gunn Elementary                  | 46.9 | 12   | 32.3 | 3.6  | .1  | 6.1 |
| J T Williams Middle                 | 86.2 | 1.1  | 6.1  | 4.4  | 1.0 | 1.1 |
| J M Washam Elementary               | 7.1  | 77.4 | 6.6  | 2.6  | .5  | 5.9 |
| James Martin Middle                 | 67.5 | 6.2  | 17.5 | 4.5  | .7  | 3.7 |
| Jay M. Robinson Middle              | 13.8 | 72.2 | 4.1  | 7.6  | .3  | 2.1 |
| Joseph Grier Middle                 | 60.3 | 4.6  | 27.8 | 4.2  | .3  | 2.7 |
| Kennedy Middle                      | 51.1 | 12.1 | 26.2 | 6.7  | .9  | 3.0 |
| Lake Wylie Elementary               | 27.7 | 41.8 | 18.8 | 5.2  | .4  | 6.1 |
| Landsdowne Elementary               | 28.9 | 48.5 | 12.1 | 2.7  | .7  | 7.1 |
| Lebanon Elementary                  | 32.3 | 24.9 | 32.8 | 2.2  | 1.0 | 6.8 |
| Lincoln Heights Elementary          | 73.7 | 5.6  | 15.1 | 3.5  | 0   | 2.2 |
| Long Creek Elementary               | 24.5 | 59.5 | 9.3  | 2.3  | .9  | 3.4 |
| Mallard Creek Elementary            | 42.1 | 31.2 | 9.3  | 10.5 | .8  | 6.2 |
| Mallard Creek High                  | 54.1 | 30.3 | 7.5  | 5.3  | .5  | 2.4 |
| Martin Luther King Middle           | 63.5 | 3.0  | 28.4 | 2.1  | .6  | 2.4 |
| Matthews Elementary                 | 10.6 | 71.1 | 6.4  | 5.4  | .4  | 6.2 |
| McAlpine Elementary                 | 13.4 | 68.2 | 8.4  | 5.9  | .3  | 3.8 |
| McClintock Middle                   | 60.1 | 13.4 | 20.5 | 2.3  | .6  | 3.1 |
| McKee Road Elementary               | 7.7  | 73.5 | 4.8  | 9.8  | .4  | 3.8 |
| Merry Oaks Elementary               | 35.6 | 3.0  | 47.1 | 9.1  | .2  | 5.0 |
| Metro (k-12)                        | 48.0 | 41.9 | 7.6  | 1.5  | 0   | 1.0 |
| Midwood (6-12)                      | 80.8 | 4.8  | 12.0 | 0    | 0   | 2.4 |
| Mint Hill Elementary                | 23.3 | 57.0 | 13.4 | 3.3  | .2  | 2.6 |
| Montclair Elementary                | 17.  | 4.6  | 73.9 | 2.1  | 0   | 2.1 |
| Morehead Elementary                 | 75.1 | 5.9  | 7.5  | 8.1  | .2  | 3.3 |
| Morgan (6 – 12)                     | 80.0 | 15.8 | 2.1  | 1.1  | 0   | 1.1 |
| Mountain Island Elementary          | 40.4 | 45.5 | 6.6  | 2.2  | .2  | 5.0 |
| Myers Park High                     | 23.0 | 62.2 | 6.8  | 6.4  | .4  | 1.3 |
| Myers Park Elementary               | 34.8 | 57.9 | 2.4  | 2.0  | 0   | 2.9 |
| Nathaniel Alexander Elementary      | 69.0 | 4.7  | 15.0 | 4.8  | 1.4 | 5.2 |
| Nations Ford Elementary             | 44.5 | 2.5  | 47.7 | 1.6  | .4  | 3.3 |
| Newell Elementary                   | 46.2 | 7.3  | 38.9 | 3.5  | .3  | 3.8 |
| North Mecklenburg High              | 24.8 | 62.9 | 6.6  | 3.6  | .6  | 1.4 |
| Northeast Middle                    | 41.0 | 35.2 | 16.5 | 2.8  | 1.0 | 3.6 |
| Northridge Middle                   | 67.5 | 5.7  | 19.3 | 4.1  | 0   | 3.4 |
| Northwest School of the Arts Middle | 51.0 | 38.8 | 5.6  | 1.1  | .6  | 2.8 |
| Oakdale Elementary                  | 67.1 | 10.9 | 14.2 | 2.7  | 1.6 | 3.5 |
| Oakhurst Elementary                 | 53.8 | 23.5 | 11.7 | 4.9  | .9  | 5.2 |
| Oaklawn Elementary (Magnet)         | 57.5 | 6.4  | 27.9 | .6   | 0   | 7.7 |
| Olde Providence Elementary          | 7.9  | 77.2 | 5.8  | 5.2  | .1  | 3.8 |
| Olympic High                        | 37.9 | 39.0 | 18.5 | 2.5  | .3  | 1.9 |
| Park Road Elementary                | 24.5 | 60.7 | 4.1  | 5.9  | 0   | 4.8 |
| Paw Creek Elementary                | 55.7 | 24.8 | 10.6 | 2.6  | 1.2 | 5.2 |
| Pawtucket Elementary                | 60.8 | 12.4 | 17.5 | 5.1  | .8  | 3.4 |
| Phillip OBerry High                 | 82.5 | 7.8  | 6.5  | 1.6  | .2  | 1.4 |
| Piedmont Open Middle                | 69.7 | 18.6 | 4.2  | 4.6  | .4  | 2.5 |
| Pineville Elementary                | 20.0 | 47.1 | 23.6 | 4.8  | .6  | 3.9 |
| Pinewood Elementary                 | 30.2 | 12.8 | 46.3 | 6.6  | 0   | 4.1 |
| Piney Grove Elementary              | 41.6 | 15.5 | 32.2 | 3.8  | .2  | 6.7 |

|                               |      |      |      |      |     |     |
|-------------------------------|------|------|------|------|-----|-----|
| Providence High               | 7.4  | 81.0 | 4.3  | 6.2  | .1  | .9  |
| Providence Springs Elementary | 4.0  | 84.8 | 2.9  | 6.0  | .1  | 2.2 |
| Quail Hollow Middle           | 36.5 | 31.4 | 25.4 | 2.9  | .6  | 3.1 |
| Rama Road Elementary          | 43.2 | 21.0 | 25.0 | 4.2  | .3  | 6.3 |
| Randolph Middle               | 53.1 | 25.4 | 11.8 | 6.5  | .6  | 2.7 |
| Reedy Creek Elementary        | 52.1 | 19.4 | 17.6 | 2.6  | .3  | 7.9 |
| Reid Park Elementary          | 90.8 | 1.4  | 4.2  | .3   | .7  | 2.6 |
| Sedgefield Elementary         | 57.9 | 5.7  | 29.0 | 2.7  | .7  | 4.1 |
| Sedgefield Middle             | 56.3 | 6.8  | 34.5 | 1.2  | 0   | 1.2 |
| Selwyn Elementary             | 11.9 | 79.2 | 4.2  | 1.5  | .3  | 2.9 |
| Shamrock Gardens Elementary   | 51.0 | 10.2 | 26.7 | 5.5  | .6  | 6.1 |
| Sharon Elementary             | 11.8 | 73.9 | 5.1  | 5.4  | .3  | 3.4 |
| Smith Academy Middle          | 27.0 | 45.0 | 15.5 | 3.5  | .3  | 8.8 |
| Smithfield Elementary         | 25.9 | 31.7 | 29.2 | 5.8  | .2  | 7.2 |
| South Charlotte Middle        | 10.3 | 72.6 | 6.8  | 6.6  | .4  | 3.2 |
| South Mecklenburg High        | 20.9 | 56.5 | 16.4 | 4.4  | .4  | 1.4 |
| Southwest Middle              | 42.1 | 31.0 | 18.4 | 3.8  | .8  | 4.0 |
| Statesville Road Elementary   | 70.6 | 7.9  | 11.8 | 4.1  | 1.1 | 4.5 |
| Steele Creek Elementary       | 41.3 | 14.6 | 30.2 | 8.7  | .3  | 4.8 |
| Sterling Elementary           | 60.8 | 3.4  | 30.6 | .3   | .7  | 4.1 |
| Thomasboro Elementary         | 79.8 | 5.6  | 4.3  | 7.1  | .3  | 3.0 |
| Torrence Creek Elementary     | 8.7  | 77.8 | 3.6  | 3.9  | .2  | 5.9 |
| Tuckaseegee Elementary        | 46.1 | 14.3 | 25.6 | 7.7  | .1  | 6.2 |
| University Meadows            | 58.5 | 11.9 | 19.6 | 3.6  | 1.0 | 5.3 |
| University Park Elementary    | 81.8 | 7.0  | 4.3  | 2.3  | 1.0 | 3.7 |
| Vance High                    | 67.0 | 9.9  | 15.8 | 5.1  | .6  | 1.6 |
| Villa Heights Elementary      | 60.2 | 19.7 | 2.0  | 12.4 | .7  | 5.0 |
| Walter G. Byers Elementary    | 91.5 | .2   | 4.7  | 2.1  | .2  | 1.6 |
| West Charlotte High           | 88.6 | 1.1  | 5.9  | 3.3  | .6  | .6  |
| West Mecklenburg High         | 88.6 | 1.1  | 5.9  | 3.3  | .6  | .6  |
| Westerly Hills Elementary     | 76.2 | 3.5  | 5.8  | 11.3 | .6  | 2.6 |
| Wilson Middle                 | 63.1 | 5.6  | 17.3 | 9.7  | 1.2 | 9.3 |
| Winding Springs Elementary    | 61.1 | 5.6  | 19.5 | 3.3  | 1.2 | 9.3 |
| Windsor Park Elementary       | 37.8 | 7.7  | 14.4 | 9.6  | .7  | 2.8 |
| Winget Park Elementary        | 27.2 | 45.9 | 15.4 | 5.3  | .2  | 6.1 |
| Winterfield Elementary        | 42.3 | 2.3  | 47.7 | 1.7  | .8  | 5.2 |

Appendix II  
CMS Test Data

Reports of Disaggregated State, School System (LEA) and School Performance Data for 2009 - 2011

Beginning in 2008-09, results for Reading, Math, and Science for grades 3-8 contain retests.

End of Grade (Mathematics) Grades 3 through 8  
Number and Percent of Students At or Above Achievement Level III in Mathematics  
Students Taking All Tests  
LEA 600 - Charlotte-Mecklenburg Schools  
Gender and Ethnicity Subgroups

| Student Subgroup  | 2009-2010               |                |                               | 2010-2011               |                |                               |
|-------------------|-------------------------|----------------|-------------------------------|-------------------------|----------------|-------------------------------|
|                   | # At or Above Level III | # Valid Scores | Percent At or Above Level III | # At or Above Level III | # Valid Scores | Percent At or Above Level III |
| All Students      | 50814                   | 62331          | 81.5%                         | 51758                   | 63383          | 81.7%                         |
| Female            | 25522                   | 30802          | 82.9%                         | 25957                   | 31234          | 83.1%                         |
| Male              | 25292                   | 31529          | 80.2%                         | 25801                   | 32149          | 80.3%                         |
| American Indian   | 187                     | 256            | 73.0%                         | 246                     | 314            | 78.3%                         |
| Asian             | 2583                    | 2883           | 89.6%                         | 2571                    | 2844           | 90.4%                         |
| Black             | 18498                   | 26034          | 71.1%                         | 19378                   | 27084          | 71.5%                         |
| Hispanic          | 7834                    | 9973           | 78.6%                         | 8249                    | 10502          | 78.5%                         |
| Two or More Races | 2364                    | 2743           | 86.2%                         | 1707                    | 1941           | 87.9%                         |
| Pacific Islander  | *                       | *              | *                             | 13                      | 16             | 81.3%                         |
| White             | 19348                   | 20442          | 94.6%                         | 19594                   | 20682          | 94.7%                         |

\* Indicates that the student population in the subgroup is too small to report the value.

End of Grade (Mathematics) Grades 3 through 8  
Number and Percent of Students At or Above Achievement Level III in Mathematics  
Students Taking All Tests  
LEA 600 - Charlotte-Mecklenburg Schools  
Detailed Gender / Ethnicity Breakdowns

| Student Subgroup               | 2009-2010               |                |                               | 2010-2011               |                |                               |
|--------------------------------|-------------------------|----------------|-------------------------------|-------------------------|----------------|-------------------------------|
|                                | # At or Above Level III | # Valid Scores | Percent At or Above Level III | # At or Above Level III | # Valid Scores | Percent At or Above Level III |
| Female - American Indian       | 100                     | 130            | 76.9%                         | 121                     | 152            | 79.6%                         |
| Female - Asian                 | 1278                    | 1413           | 90.4%                         | 1282                    | 1409           | 91.0%                         |
| Female - Black                 | 9446                    | 12872          | 73.4%                         | 9879                    | 13315          | 74.2%                         |
| Female - Hispanic              | 3867                    | 4884           | 79.2%                         | 4068                    | 5143           | 79.1%                         |
| Female - Two or More Races     | 1195                    | 1367           | 87.4%                         | 856                     | 964            | 88.8%                         |
| Female - Pacific Islander      | *                       | *              | *                             | 7                       | 8              | 87.5%                         |
| Female - White                 | -                       | 10136          | >95%                          | -                       | 10243          | >95%                          |
| Male - American Indian         | 87                      | 126            | 69.0%                         | 125                     | 162            | 77.2%                         |
| Male - Asian                   | 1305                    | 1470           | 88.8%                         | 1289                    | 1435           | 89.8%                         |
| Male - Black                   | 9052                    | 13162          | 68.8%                         | 9499                    | 13769          | 69.0%                         |
| Male - Hispanic                | 3967                    | 5089           | 78.0%                         | 4181                    | 5359           | 78.0%                         |
| Male - Two or More Races       | 1169                    | 1376           | 85.0%                         | 851                     | 977            | 87.1%                         |
| Male - Pacific Islander        | *                       | *              | *                             | 6                       | 8              | 75.0%                         |
| Male - White                   | 9712                    | 10306          | 94.2%                         | 9850                    | 10439          | 94.4%                         |
| Economically Disadvantaged     | 24857                   | 34254          | 72.6%                         | 26012                   | 35619          | 73.0%                         |
| Not Economically Disadvantaged | 25957                   | 28077          | 92.4%                         | 25746                   | 27764          | 92.7%                         |
| Limited English Proficiency    | 4943                    | 7036           | 70.3%                         | 4516                    | 6537           | 69.1%                         |
| Not Limited English Proficient | 45871                   | 55295          | 83.0%                         | 47242                   | 56846          | 83.1%                         |
| Migrant                        | *                       | *              | *                             | *                       | *              | *                             |
| Not Migrant                    | 50814                   | 62331          | 81.5%                         | 51758                   | 63381          | 81.7%                         |

\* Indicates that the student population in the subgroup is too small to report the value. The percentage and number of students are not shown if the percentage is greater than 95 percent or less than 5 percent.

End of Grade (Mathematics) Grades 3 through 8  
Number and Percent of Students At or Above Achievement Level III in Mathematics  
Students Taking All Tests  
LEA 600 - Charlotte-Mecklenburg Schools  
Disability Subgroups

| Student Subgroup                   | 2009-2010               |                |                               | 2010-2011               |                |                               |
|------------------------------------|-------------------------|----------------|-------------------------------|-------------------------|----------------|-------------------------------|
|                                    | # At or Above Level III | # Valid Scores | Percent At or Above Level III | # At or Above Level III | # Valid Scores | Percent At or Above Level III |
| Students With Disabilities         | 3534                    | 6543           | 54.0%                         | 3307                    | 6207           | 53.3%                         |
| Non-Disabled Students              | 47280                   | 55788          | 84.7%                         | 48451                   | 57176          | 84.7%                         |
| Academically Gifted                | -                       | 8979           | >95%                          | -                       | 8675           | >95%                          |
| Academically Gifted Math           | -                       | 8976           | >95%                          | -                       | 8672           | >95%                          |
| Academically Gifted Reading        | -                       | 8969           | >95%                          | -                       | 8664           | >95%                          |
| Autistic                           | 215                     | 364            | 59.1%                         | 256                     | 412            | 62.1%                         |
| Deaf-Blindness                     | *                       | *              | *                             | *                       | *              | *                             |
| Developmental Delay                | 10                      | 28             | 35.7%                         | 21                      | 35             | 60.0%                         |
| Deafness                           | 1                       | 7              | 14.3%                         | 2                       | 7              | 28.6%                         |
| Serious Emotional Disability       | 183                     | 461            | 39.7%                         | 178                     | 389            | 45.8%                         |
| Hearing Impairment                 | 62                      | 97             | 63.9%                         | 63                      | 94             | 67.0%                         |
| Intellectual Disability - Mild     | 204                     | 580            | 35.2%                         | 188                     | 518            | 36.3%                         |
| Intellectual Disability - Moderate | 109                     | 173            | 63.0%                         | 103                     | 168            | 61.3%                         |
| Intellectual Disability - Severe   | 12                      | 22             | 54.5%                         | 14                      | 27             | 51.9%                         |
| Specific Learning Disability       | 1849                    | 3333           | 55.5%                         | 1764                    | 3285           | 53.7%                         |
| Multiple Disabilities              | 32                      | 57             | 56.1%                         | 30                      | 55             | 54.5%                         |
| Other Health Impairment            | 568                     | 1090           | 52.1%                         | 590                     | 1140           | 51.8%                         |
| Orthopedic Impairment              | 30                      | 58             | 51.7%                         | 31                      | 55             | 56.4%                         |
| Speech or Language Impairment      | 1500                    | 1852           | 81.0%                         | 1240                    | 1537           | 80.7%                         |
| Traumatic Brain Injury             | 6                       | 10             | 60.0%                         | 4                       | 5              | 80.0%                         |
| Visual Impairment incl. Blindness  | 20                      | 33             | 60.6%                         | 25                      | 35             | 71.4%                         |

\* Indicates that the student population in the subgroup is too small to report the value. The percentage and number of students are not shown if the percentage is greater than 95 percent or less than 5 percent.

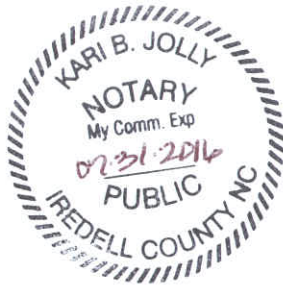
### VIII. SIGNATURE PAGE

The foregoing application is submitted on behalf of INVEST COLLEGIATE Consortium, Inc. (*name of non-profit corporation or individuals submitting application*). The undersigned has read the application and hereby declares that the information contained in it is true and accounts to the best of his/her information and belief. The undersigned further represent that the applicant has read the Charter School Law and agrees to be governed by it, other applicable laws, and SBE regulations.

Print/Type Name: Dr. Antoinette Crawford Ellison

Position: INVEST COLLEGIATE Board Chair

Signature: Dr. Antoinette Crawford Ellison Date: April 11, 2012



Sworn to and subscribed before me this

11 day of April, 2012.

Kari B. Jolly  
Notary Public Official Seal

My commission expires: 07-31, 2016.