

2023 NC CHARTER APPLICATION



NC Public Charters

Organization Information

Organization Name *

Highlands Charter Academy

Telephone

7047790161

Fax

Address

PO Box 175

Unit/Suite

Zip Code

28327

City

Carthage

State

North Carolina





Primary Contact Name *

Caroline Kelly

Opening Year *

2025

Is Management Organization Used

Yes No

Primary Contact Relation To Board *

Chair of Founding Board

Management Organization Name

Board Members Roster *

Management Organization Contact Name

Primary Contact Email *

cafskelly@gmail.com

Management Organization Phone

Primary Contact Phone *

7047790161

Management Organization Email

PrimaryContact Address *

3313 Kelly Plantation Road

Unit/Suite *

Zip Code *

28327

City *

Carthage

State *

North Carolina



1. Application Contact Information

Q1. Name of Proposed Charter School

Highlands Charter Academy

Q2. Primary Contact's Alternate Telephone Number (xxx-xxx-xxxx)

- The primary contact will serve as the contact for follow-up, interviews, and notices regarding this Application

910-850-4295

Q3. Geographic County in which charter school will reside

Moore County

Q4. LEA/District Name

Moore County Schools

Q5. Zip code for the proposed school site, if known

28327

Q6. Was this application prepared with the assistance of a third party such as a consultant or [Charter Support Organization \(CSO\)](https://simbli.eboardsolutions.com/Policy/ViewPolicy.aspx?S=10399&revid=hejlslsh9eI7BC8rRkMVLthGg%3d%3d&ptid=amIgtZiB9plushNjl6WXhfiOQ%3d%3d&secid=lyc2NlZPsdzgEk6V6aj45g%3d%3d&PG=6&IRP=0) (<https://simbli.eboardsolutions.com/Policy/ViewPolicy.aspx?S=10399&revid=hejlslsh9eI7BC8rRkMVLthGg%3d%3d&ptid=amIgtZiB9plushNjl6WXhfiOQ%3d%3d&secid=lyc2NlZPsdzgEk6V6aj45g%3d%3d&PG=6&IRP=0>)?

- Yes
- No

Q10. Projected School Opening Month

August

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

- Yes (Year-Round)



No

Q12. Complete the Enrollment Summary table (see resources), providing grade levels and total projected student enrollment for Years 1-5.

Upload Required File Type: excel Max File Size: 30 Total Files Count: 1

Resources

Enrollment Summar...

Applicant Evidence :

Enrollment Summar...

Uploaded on **4/25/2023**
by **Karen Manning**

Q13. At full capacity, what is your estimated student enrollment and grade spans?

For this 5-year application period, HCA will be K-6.

Year One: 112 students (K-2)

Year Two: 212 students (K-3)

Year Three: 334 students (K-4)

Year Four: 450 students (K-5)

Year Five: 646 students (K-6)

We plan to add a grade each year until HCA is K-12.

Q14. Complete the Enrollment Demographics table (see resources), providing projected enrollment for each of the following demographic groups.

Upload Required File Type: excel Max File Size: 30 Total Files Count: 1



Resources



Enrollment Demogra...

Applicant Evidence :



Enrollment Demogra...

Uploaded on **4/25/2023**
by **Karen Manning**

Q15. Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan outlined above.

From the start, HCA will cast a vision for high expectations as active learners and a school culture of moral virtue, decorum, respect, discipline, and studiousness among both students and faculty. We believe that by beginning small and steadily growing the number students through the years is the best approach to achieving these goals.

The students that enroll in the first few years will set the tone for years to come. We realize that a few families may relocate or choose another school and not continue at HCA, but we are confident that most students will remain and return each subsequent school year. The new students coming into that grade will be divided among the classes allowing for smooth assimilation for these new students as they become accustomed to an environment they may not have experienced at school before.

Even though we will double from two classes of each grade offered in Year One to four of each grade in Year Five (six for sixth grade), we anticipate many Moore County families will desire their children to attend HCA and that the school will experience a sizable waitlist.

Q16. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- I certify
- I do not certify



Q17.Explanation (optional)



2. Non-Profit Corporation Information


Private Non-profit Corporation (NCGS 115C-218.1)

- The nonprofit corporation must be officially authorized by the NC Secretary of State upon application submission.

Q18. Organization Type

- Non-Profit Corporation
- Municipality

Applicant Evidence :


Highlands Charter A...

Uploaded on **4/28/2023**
by **Caroline Kelly**

Q19. Official name of the private, non-profit corporation as registered with the NC Secretary of State

- This is the entity that will hold the Charter if final approval is granted by the NC State Board of Education.

Highlands Charter Academy

Q20. Has the organization applied for 501(c)(3) non-profit status?

- Yes
- No

Applicant Comments :

We plan to apply for 501(c)(3) non-profit status soon.

Q21. The private non-profit listed as the responsible organization for the proposed charter school has 501(c)(3) status:



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

- Yes
- No

Applicant Comments :

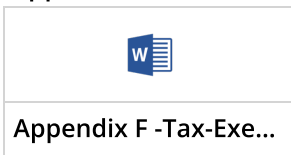
Will be obtained within twenty-four (24) months of the date the Charter Application is given final approval.

Q22. Attach as Appendix F Federal Documentation of Tax-Exempt Status

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

Total Files Count: 10

Applicant Evidence :



Appendix F -Tax-Exe...

Uploaded on **4/25/2023**
by **Karen Manning**

Q23. Name of Registered Agent and Address

- As listed with the NC Secretary of State

HIGHLANDS CHARTER ACADEMY

3313 KELLY PLANTATION ROAD

CARTHAGE, NC 28327

Q24. Federal Tax ID

92-3586572





3. Acceleration

Per NC Administrative Code 16 NCAC 06G .0509 (<https://simbli.eboardsolutions.com/Policy/ViewPolicy.aspx?S=10399&revid=84R1LVelxY9lvhpKdhHt1w==&ptid=muNUIKiR2jsXcslsh28JpBkiw==&secid=x9VPtMUo9twbb6Q1kKyM7A==&PG=6&IRP=0>), the State Board of Education, in its discretion, may accelerate the mandatory planning year to increase the number of high-quality charter schools.

Q25. Requirements

The State Board of Education may accelerate the mandatory planning year for a charter applicant that meets the following requirements:

- (1) agrees to participate in the planning year while the charter application is being reviewed without any guarantee of charter award; and
- (2) demonstrates that there is a facility identified by the applicant that is feasible for opening on an accelerated schedule. Do you want your application to be considered for acceleration?

- Yes
- No



4. Conversion

Q39. Is this application a Conversion from a traditional public school or private school?

- Yes
- No



5. Replication

Per NC Administrative Code 16 NCAC 06G .0512, the State Board of Education (SBE) may, in certain well-defined instances, grant permission for a non-profit corporation board of directors (board) to replicate either its own successful model or to employ an educational management company (EMO) or a charter management organization (CMO) to replicate a successful model currently being operated under the management of the EMO or CMO. The SBE may also, in certain well-defined instances, grant permission for a non-profit corporation board to “fast track” such a replication by foregoing the planning year normally required for newly-approved charter applicants.

If applying for a replication, please review the following definitions and continue in this section.

- (1) "Charter school model" or "model" mean the mission as defined in the charter application and function of a charter school, including its governance, its curriculum, its organizational structure, its targeted population, and other key characteristics of the school, such as small class size, thematic academics, and extended day.
- (2) "Successful model" means a charter school model that meets the eligibility requirements in Rule .0513 of this Section.
- (3) "Replication" means the act of copying, recreating, or repeating, a successful charter school model. A "replication" requires the utilization of one charter school "model" to form the creation of a new charter school.
- (4) "Fast-Track Replication" is a special form of replication in which the approved applicant foregoes the planning year required of new charter school applicants.

History Note: Authority G.S. 115C-218.3;

Emergency Adoption Eff. August 20, 2019;

Eff. March 17, 2021.

Q56. Do you want this application to be considered for standard or fast-track replication?

- Standard
- Fast-Track



No, this is not a replication



6. Alternative

*A charter school meeting the eligibility criteria set forth in this policy and seeking designation as an “alternative school” must submit an application to the Office of Charter Schools describing in detail the school’s mission as it relates to the request for the designation; the criteria the school plans to use that will meet the eligibility requirements set forth below, including the documentation the school will use to support its admissions process; how the school intends to serve the select population, educationally and otherwise; and the goals the school is setting for academic achievement for this population. The application must also include an admission plan that is well-defined and specifically limited to serving at-risk students as described in the application. A plan that is not well-defined will not be approved.

*The school must, in its application, designate which of the alternative accountability options it is requesting under ACCT-038 (<https://simbli.eboardsolutions.com/ePolicy/policy.aspx?PC=ACCT-038&Sch=10399&S=10399&C=ACCT&RevNo=1.02&T=A&Z=P&St=ADOPTED&PG=6&SN=true>). The option selected, if approved, cannot be changed except at the time of renewal (as outlined in CHTR-020.III (<https://simbli.eboardsolutions.com/ePolicy/policy.aspx?PC=CHTR-020&Sch=10399&S=10399&C=CHTR&RevNo=1.02&T=A&Z=P&St=ADOPTED&PG=6&SN=true>)).

Q67. Do you want your application to be considered for an Alternative Charter School?

- Yes
- No



7. EMO/CMO

Q69. Does the Charter School plan to contract for services with an “educational management organization” or “charter management organization?”

- Yes
- No



8. Mission Purposes, and Goals

8.1. Mission and Vision

The mission and vision statements, taken together, should:

- Identify the students and community to be served;
- Illustrate what success will look like; and
- Align with the purposes of the NC Charter School Law.

Q84. Please state the mission statement of the proposed charter school (35 words or less)

- The mission statement defines the organization's purpose and primary objectives, describing why it exists.
- The mission statement should indicate in measurable terms what the school intends to do, for whom, and to what degree.

HCA will cultivate lifelong intellectual curiosity in its students through a traditional, content-rich classical education that emphasizes virtuous living, moral character, and civic responsibility, equipping students to live well-ordered lives.

Q85. Please state the vision statement of the proposed school.

- What will the school look like when it is achieving the mission?
- The vision statement outlines how the school will operate and what it will achieve in the long term.



Vision Statement

Highlands Charter Academy will develop the minds and nurture the hearts of students through a content-rich, classical liberal arts education that develops both academic potential and personal integrity such that they will be well-prepared for family responsibilities, a career, and a lifetime of learning. HCA will emphasize human virtue, moral character, and responsible citizenship in teacher-led classrooms.

Achieving the Mission

Highlands Charter Academy (HCA) will implement a traditional classical curriculum designed as a survey of the best intellectual, cultural, and spiritual traditions of America that, for generations, have been developed and refined.

Students will receive a well-rounded education in the liberal arts and sciences. Curricular materials will be age-appropriate and provide a fair, balanced, and honest account in every discipline. All students will study literature and mathematics, history/civics and the sciences, reading/writing /speaking, fine arts, foreign languages, and physical education. Through consistent engagement with the classical virtues and with significant historical figures, HCA students will form a complex understanding of the foundational tenets of our Western heritage.

HCA will give students the skills and knowledge to become citizens of distinction. The school will insist on high standards, believing that all children can and will flourish, regardless of sex, race, or socioeconomic status. HCA will seek to develop character through curricular and extracurricular offerings that will nurture the child's humanity with a constant view of the emerging adult. The school will actively engage learners to shape a citizenry who aspire to the classical ideals of diplomacy, justice, temperance, fortitude, compassion, perseverance, humility, and kindness and who are well-equipped as citizens to serve their families, community, state, and nation.

Q86. Educational Need and Targeted Student Population of the Proposed Charter School Provide a description of the Targeted Population in terms of demographics. In your description, include how this population will reflect the racial and ethnic composition of the school system in which it is located. Additionally, how it will reflect the socioeconomic status of the LEA, SWD population, and ELL population of the district? See G.S. 115C-218.45(e) (https://www.ncleg.net/EnactedLegislation/Statutes/PDF/BySection/Chapter_115C/GS_115C-218.45.pdf).



Moore County is in the central region of North Carolina. The southern half of the county is much more heavily populated than the northern. The three charter schools, located in the southern half of the county, served 1,215 students in 2021. Moore County's eight private schools, also located in the southern half, served over 1,523 students in 2021-22. Moore County Public Schools served 12,626 students in 22 schools in 2021-22.

Because we plan to locate in central Moore County, demographics may differ from the county as a whole and existing public and charter schools in Moore County. Intentional efforts will be taken to provide lower-income, economically disadvantaged families living in the northern half of the county information about this educational alternative to the low performing schools currently available to them.

Race/Ethnicity of Moore County Residences Compared to Northern Moore County School Population						
Demographic	White	Black	His	Am Ind	Asian	Other
Moore County	77%	12%	6%	2%	2%	2%
Northern Moore County School Population	64%	9%	20%	1%	0%	6%

*% may not equal 100% because of rounding

Economically Disadvantaged Student (EDS)

According to the North Carolina Department of Public Instruction's (NCDPI) most currently available figures, the percentage of Moore County Schools located in the northern half of the county students who qualify for free and reduced-priced lunch is 40%.

The Board of Highlands Charter Academy will seek to recruit members from these Economically Disadvantaged regions of the county.

Percent Economically Disadvantaged Students by Northern Moore County Schools			
School Name	Total Free or Reduced Lunches	Total Students	% Free or Reduced Lunches
Cameron Elem	131	238	55%
Carthage Elem	157	323	49%
Highfalls Elem	94	257	37%
Robbins Elem	290	373	78%
Sandhills Farm Life	74	359	21%
Westmoore Elem	130	284	46%
Crain's Creek Middle	265	588	45%
Elise Middle	179	235	76%
New Century Middle	166	640	26%
North Moore HS	288	614	47%
Union Pines HS	318	1377	23%
Total Northern Moore County	2092	5288	40%



(based on IES NCES 2021-22)

English Language Learner (ELL)

Highlands Charter Academy percentage of English Language Learner (ELL) students and minority students may trend higher than the Local Education Agency (LEA) as a result of focused efforts to promote in this community and the knowledge that a much larger percentage of non-English speaking families live in the northern/northwestern sector of the county. The percent of students who met North Carolina's definition of progress toward English language attainment as demonstrated on NC's English language proficiency test was only 30% for Robbins and 18.2% for Westmoore. There is no data available for Carthage.

Students With Disabilities (SWD)

Highlands Charter Academy will attempt to mirror the percentages of Students With Disabilities (SWD) of Moore County Public Schools. According to IES NCSE, 7% of Moore County students have disabilities.

Summary

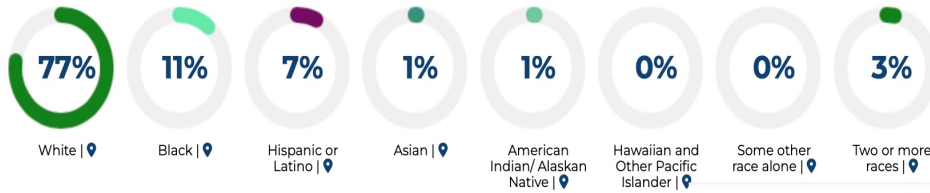
Highlands Charter Academy will not limit admission to students on the basis of household income, race, creed, national origin, religion, or ancestry. Nor will the school limit admission to students on the basis of intellectual ability, measures of achievement or aptitude, athletic ability, or disability. The Board will make a strong attempt to inform parents/guardians in northern Moore County about HCA. We anticipate being a most attractive option primarily for those families of students who are not being provided an equitable education.



Moore County Schools, North Carolina

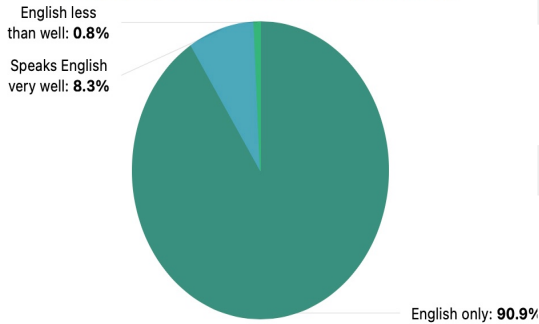


Race/Ethnicity



Children in Public School

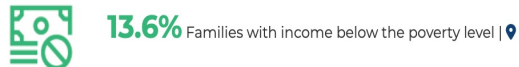
Language spoken at home (children 5 years and over)



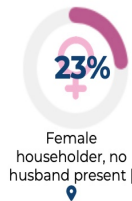
Health



Poverty and Benefits (in the past 12 months)

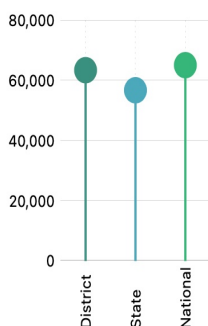


Families by Type

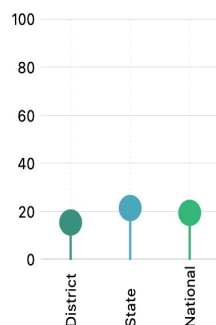


State and National

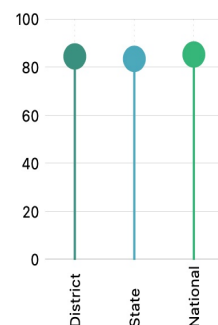
Median Household Income | 📍



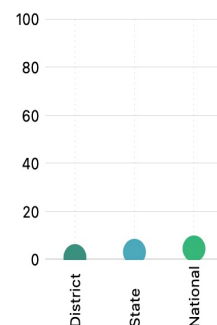
Families with Food Stamp/SNAP benefits | 📍

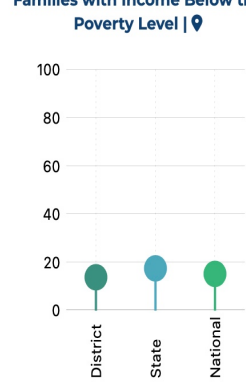
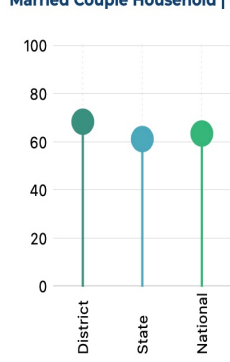
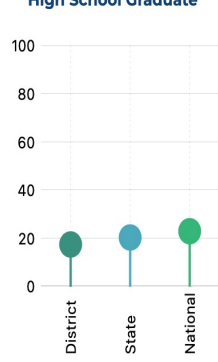
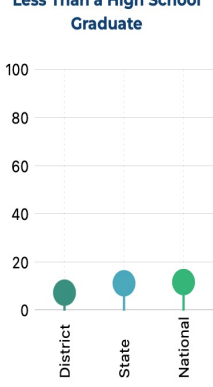


Households with Broadband Internet | 📍



Speaks English Less Than Very Well | 📍





2023 NC CHARTER APPLICATION
NC Public Charters



Q87. What are the enrollment trends and academic performance outcomes of surrounding schools in the selected community? What elements of your educational model will meet the needs of your target student population?



Enrollment Trends

North Carolina's population growth continues, despite the challenges brought on by the COVID-19 pandemic. The state gained more people than all but Texas, Florida, and Arizona. Between the April 1, 2020 Census count and July 1, 2021, North Carolina added 112,000 people, according to the US Census Bureau's latest population estimates (a gain of 1.1%). On July 1, 2021, 10.6 million people were living in North Carolina and the state remained the 9th largest state in the nation. (Office of State Budget Management, Dec. 2021)

What was once considered a sleepy little golf resort area, the Sandhills region of North Carolina is no longer such. Researchers say that Moore County is poised to continue to grow as a community of choice for not only retirees, but families, military families connected to Fort Bragg, as well as people who work remotely. The county is also experiencing a spillover from the regional manufacturing and tech industry boom. People live in Moore County and think nothing of commuting an hour to Raleigh or Fayetteville for work. Also, several industrial projects are planned for the northern part of the county.

According to The Pilot, the local newspaper, the school district last conducted an enrollment growth study in 2017. That study projected that Moore County Schools would serve 12,919 students in 2022. Researchers based their projections on trends in residential development, the number of children born to county residents, and regional industrial growth. They conducted interviews with county and municipal planners as well as industry and business leaders. In 2021-22 the district exceeded those projections with enrollment of 12,963, the first time that the district's enrollment has eclipsed the 12,900 mark. (Oct 12, 2022)

Enrollment forecasts now indicate that Moore County Schools will enroll a total of 14,000 K-12 students in 2029, and grow to 15,000 by 2032.

If enrollment trends continue as projected, McDeeds Creek Elementary and New Century Middle will be over capacity by 2028. They would be followed by Sandhills Farm Life in 2029 along with Aberdeen Elementary and Crain's Creek Middle toward the end of the decade-long forecasting period. (The Pilot, Oct. 12, 2022)

Facilities in Moore County are a troublesome issue for the system. Crain's Creek Middle School's enrollment is now around 600 and only has classrooms for about 450. Carthage Elementary School is in need of extensive modernization or complete replacement. Both Pinecrest High School and Union Pines High School serve more students than their campuses were designed to hold. Pinecrest has 2,200 students in buildings designed for 1,600, and Union Pines's enrollment is up over 1,400 on a campus built for 1,060. An Advanced Career Center "concept" high school devised as part of a 2015 plan to absorb some of the traditional high schools' enrollment has been indefinitely shelved. Expanding Pinecrest and Union Pines to accommodate their current enrollment without modulars,



and renovating those schools' original 1960s-era buildings, is likely to cost \$245 million by the time the county could realistically fund such a project. High school renovation plans developed in 2015 do not take into account enrollment growth beyond this year. (The Pilot, March 24, 2023)

Academic Performance

Charter schools in Moore County are performing well. According to Public School Review (<https://www.publicschoolreview.com> (<https://www.publicschoolreview.com/>)), the three existing Moore County, NC, public charter schools have an average math proficiency score of 70% (versus the North Carolina public charter school average of 47%), and reading proficiency score of 71% (versus the 57% statewide average). Charter schools in Moore County have an average ranking of 10/10, which is in the top 10% of North Carolina public charter schools.

Because we will position Highlands Charter Academy (HCA) in centrally-located Carthage, the school could conceivably draw students from all corners of the county. We will heavily focus promotional/recruiting efforts toward the upper half of the county because the schools in that area are some of the poorer performing schools in the county as a whole. HCA wishes to offer to those students the benefit of a content-rich and nourishing classical liberal arts education where they can flourish through intellectual rigor and the encouragement of human virtue, moral character, and civic responsibility.

For the 2021-22 school year, Moore County Schools had five schools categorized as low-performing schools (schools that have a grade of a D or F and a growth status of Met or Not Met). Two are in the northern part of the county, Robbins Elementary and Cameron Elementary.

Robbins Elementary is the worst performing school in the county. The most recent report saw receiving an F performance grade. This school has 72% minority enrollment, 59% Hispanic with 79% of students receiving free or reduced lunch. Only 14% of Robbins Elementary students are at least proficient in math and only 18% in reading. This school has a 46% Chronic Absenteeism Rate. (HCA will very heavily market to this area of the county.)

Cameron Elementary received a D performance grade. This school is 40% minority students with 20% Hispanic and 55% of students are economically disadvantaged. Only 38% of Cameron Elementary students are at least proficient in math and only 42% in reading. This school has a 41% Chronic Absenteeism Rate.

Schools receiving a D performance grade and which can be considered in the HCA service area are Elise Middle and Westmoore Elementary. Elise Middle has 60% minority enrollment with 53% Hispanic and 76% students receive free or reduced lunch. Only 26% of Elise Middle School students test proficient in math and 31% in reading. Westmoore Elementary is 13% Hispanic and 46% students receive free or reduced lunch. Only 27% of Westmoore Elementary School students test proficient in math and 42% in reading.



Schools receiving a C performance grade in the forecasted service area are: Carthage Elementary, Highfalls Elementary, and North Moore High. Carthage Elementary is 9.5% Hispanic and 49% of students receive free or reduced lunch. Only 42% of the students are at least proficient in math and 52% in reading. Highfalls Elementary is 10% Hispanic and 36.5% students receive free or reduced lunch. 57% of students are at least proficient in math and 52% in reading. North Moore High is 31.5% Hispanic and 47% students receive free or reduced lunch. The school tests at 52% proficient in math and 47% in reading.

Overall, too many Moore County School students are reading below grade level. In third grade, 11% are below grade level. It worsens the older they get, with 24% of 4th and 5th graders and 26% of 6-8th graders reading below grade level. And by 10th grade, 19% are still reading below grade level.

Educational Model to Meet Needs

While there is a demonstrated need for area schools to upgrade their offering so that students will reach required proficiency levels, education is about more than just preparing for college or getting a good job. Education is about cultivating students into a certain kind of human being. It is about training their minds and directing their souls such that they become men and women who love the good, the beautiful and the true, and are characterized by virtue and wisdom.

HCA students will seek much more than just “being smart” or earning a good grade (which we are confident they will do). They will learn how ideas from all disciplines build upon each other to provide a coherent and interconnected understanding of the world and how we ought to live. This will be a cooperative learning endeavor. Students will not feel a need to self-segregate into “the STEM Kids” or “the Arts Kids.” Instead, they all work together as they become well-rounded individuals capable of making profound connections and living well-integrated lives.

HCA’s curriculum was carefully selected to meet the needs of all students within the enrollment zone. We foresee a population of students from diverse backgrounds with varying learning abilities. The curriculum chosen is time-tested and has been successfully implemented for students from academically, socially, and economically varied backgrounds.

The four core disciplines of math, science, literature, and history, with attention to music, art, physical education, and foreign languages will be emphasized. American history and geography, memorization and recitation of American documents will be focused upon in the teaching of history and civics in the early years. World history and geography will also find an important place.

Complete information about the curriculum HCA plans to offer can be found in Q96-Instructional Program.

Regarding the curriculum and how it can meet the needs of our target student population, the classical education model chosen by HCA is rooted in the liberal arts and sciences and will offer a



firm grounding in civic virtue and cultivate moral character. The Core Knowledge educational methods chosen have been shown to improve academic achievement, increase cultural literacy, enhance critical thinking, and improve communication skills. The Singapore Math curriculum is known for emphasizing a deep understanding of math concepts rather than memorizing procedures. It uses visual and concrete learning strategies, such as manipulatives, to help students understand abstract math concepts. Learning Latin will enhance children's vocabulary and improve their grammar and communication skills. Those seeking such an education for their children in Moore County will likely enroll them in HCA.

Q88. What will be the total projected enrollment at the charter school and what percentage of the Average Daily Membership (ADM) does that reflect when compared to the Local Education Agency (LEA) of the same offered grade levels? (i.e. If the proposed school will be grades 9-12, only compare the total enrollment to the total enrollment of the LEA in grades 9-12).

The first academic year, 2025-26, Highlands Charter Academy will offer K-2 with two of two classes of each grade. Thereafter, the school plans to increase one grade level every year until reaching capacity in twelfth grade (2035).

Because Moore County is projected to grow substantially in the next five years, basing the percentages on 2021-22 data is very skewed and these percentages are much higher than will actually be experienced.

- Year One 2025: There will be 112 students in the first year in Grades K-2 which is 4% of Moore County K-2 2021-22 student enrollment (2683). Kindergarten and Grade 1 will have a maximum of 18 students per teacher and second grade will have a maximum of 20 students per teacher.
- Year Two 2026: There will be 212 students in the second year in grades K-3 which is 5.8% of 2021-22 Moore County K-3 2021-22 student enrollment (3626). Third grade will have a maximum of 22 students per teacher.
- Year Three 2027: There will be 334 students in the third year in grades K-4 which is 7.3% of Moore County 2021-22 K-4 student enrollment (4541). Fourth grade will have a maximum of 22 students per teacher.
- Year Four 2028: There will be 450 students in the fourth year in grades K-5 which is 8.2% of Moore County 2021-22 K-5 student enrollment (5473). Fifth grade will have a maximum of 24 students per teacher.
- Year Five 2029: There will be 646 students in the fifth year in grades K-6 which is 10% of Moore County 2021-22 K-6 student enrollment (6423). Sixth grade will have 25 a maximum of students per teacher.

Q89. Summarize what the proposed school will do differently than the schools that are



now serving the targeted population. What will make this school unique and more effective than the currently available public-school options?



Highlands Charter Academy (HCA) will stand alone in Moore County public schools in that it will utilize the classical model of education. One of the unique strengths of classical education is the emphasis placed on teacher-led classrooms and time-tested content. Education at HCA will emphasize the principles of traditional learning, virtuous living, and civic responsibility. As a famous American educator is fond of saying, students should learn to “love those things which are lovely and esteem and pursue wisdom.” HCA will strive to develop minds and impart knowledge, improve hearts, and nurture traditional virtues. We, along with family and faith institutions, have an obligation to foster citizenship and character in young people and HCA will strive to do its part in that regard. The rigor of the classical model will not only equip HCA students with a rich foundation of knowledge but also teach them how to organize those facts and ideas and, finally, empower them to analyze and penetrate life’s more significant questions.

- The curriculum will be consistent with K-12 NC standards and build from what students learned the previous year.
- The curriculum will be content-rich, balanced, and strong across the four disciplines of math, science, literature, and history.
- The approach to instruction will acknowledge objective standards of correctness, logic, beauty, weightiness, and truth.
- There will be explicit instruction in phonics and grammar. In the lower grades, teachers will understand and may implement the Science of Reading (SOR), specifically using the neurodevelopmental approach to teaching literacy. This may include the intentional teaching of phonemic awareness and elision. HCA will ensure teachers have a solid understanding of the Knowledge and Practice Standards for Teachers of Reading and may use it to guide their instruction using the SOR Core Curriculum.
- Teachers will informally introduce Latin roots to students in grades four and five, which has been demonstrated to improve reading comprehension and vocabulary and bolster performance in all subjects. The formal study of Latin will begin in middle school.
- Upper-level students will study history mainly through primary source documents to foster analytical skills and essential insight into their culture and heritage.
- All students will be trained in study skills, such as time management, organization, and note-taking, that are essential for success in further academic pursuits.
- HCA will cast a vision early for high expectations as active learners.
- The virtues of character will be stressed through classic literature and the study of Western Civilization. Such studies will help to build positive conduct through the actions and consequences of the characters and historical figures studied.
- There will be a school culture of moral virtue, decorum, respect, discipline, and studiousness among both students and faculty. HCA will introduce and seek to instill virtues of character in the lower grades by emphasizing responsibility, respect, courage, courtesy, honesty, and citizenship. Instruction in the classical virtues of prudence, justice, temperance, and fortitude will be stressed in the upper grades as a continuance of the Elementary character program and as a necessary corollary to the classical curriculum. Staff will reinforce these traits as per the procedures set by the



headmaster.

- There will be the study of the American literary, moral, philosophical, political, and historical traditions.
- Instruction will be in the Western tradition through history, literature, philosophy, and the fine arts.
- Since technology is so widely pervasive and can distract from the content being taught, it will be a secondary resource in HCA learning culture rather than a dominant feature of each classroom. HCA will have a commitment to use technology effectively without diminishing the faculty leadership that is crucial to academic achievement.
- Uniforms will be required.

Q90. Describe the relationships that have been established to generate support for the school. How have you assessed demand for the school? Briefly describe these activities and summarize their results



Members of the Highlands Charter Academy Founding Board have conversed with friends, neighbors, coworkers, parents, and community leaders for several months, if not years, regarding education choices in Moore County. Members of the Board are well aware of the state of education in Moore County. Several are regular attendees at Moore County School Board Meetings and some have assisted with the campaigns of those running for positions on the Board. One member works at the local community college, and another recently retired from the college. Most are very involved in community groups such as Bible Studies, civic clubs, and the like, where they listen to the concerns of many parents.

Board members have been featured guests at community group meetings where they inform citizens about the potential school and are met with positive reactions, encouragement, and support.

The common theme heard in the community is the dismal performance of students in the northern part of the county, especially those of Hispanic backgrounds and those living in poverty. The desire for a school of choice in this part of the county has been paramount. Parents in these communities are anxious and desire an option to the public school to which their child is assigned.

Another refrain heard repeatedly is that it is unfortunate that only the children of middle to high-income parents have school choice. The private schools are out of reach financially for the majority of our community. Furthermore, the six private and three charter schools in Moore County have waiting lists. For example, in the 2022-23 school year, St. John Paul II Catholic School was forced to turn away 112 students (ironically, the number of students HCA plans to serve in the first year). Even if families could afford it, many can't attend because the demand is so high.

Highlands Charter Academy built a website in January with an "Expression of Interest" form on the home page. Within only a few months and with minimal promotions, as of this application time, 120 families in Moore County have indicated that they are very interested in the school and would consider sending their child(ren) to Highlands Charter Academy. New submissions come in almost daily.

The website has a Spanish read option. It was proofread by a fluent Spanish-speaking person who confirms it translated well.

The HCA team has attended and plans to attend community events in the Robbins area and have brochures and flyers in Spanish. The team will work closely with the Spanish-speaking churches in Robbins which are a hub of community activity. We will also have flyers, brochures, and cards in the many Hispanic food markets, bakeries, and restaurants. We will have marketing collateral at the Sandhills Community College Robbins Center where High School Equivalency and English Language Acquisition Classes are offered.

The team will present to the Moore County Commissioners and the Carthage Town Council in May.



They will continue to seek opportunities to present the school to groups such as the Rotary Clubs, Kiwanis Clubs, the Chamber of Commerce, and civic and church groups.

Q91. Attach Appendix A: Evidence of Community/Parent Support.

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

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

Total Files Count: 5

Applicant Comments :

Attached is information regarding parental support, public meetings, events, and letters of support we received from our State Senator, House Representative, a County Commissioner, and the Executive Director of a local group that provides enrichment and support to local school children.

Applicant Evidence :

	
Letters Of Support.pdf	Appendix A.docx

Uploaded on **4/26/2023** by **Karen Manning** Uploaded on **4/26/2023** by **Karen Manning**

8.2. Purposes of the Proposed Charter School

Q92. Select one or more of the six legislative purposes the proposed charter will achieve, as specifically addressed in the NC charter school statute GS 115C-218, and the proposed school's operations. The Six Legislative Purposes of a Charter School are:

- Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site.
- Hold schools accountable for meeting measurable student achievement results.
- Provide parents and students with expanded choices in the types of educational opportunities that are available within the public-school system.



- Improving student learning.
- Increasing learning opportunities for all students, with a special emphasis on at-risk or gifted students.
- Encourage the use of different and innovative teaching methods.

Q93. Provide a brief narrative to coincide with each applicable legislative purpose(s).



Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site.

Highlands Charter Academy (HCA) will seek out, reward, and retain the very best teachers. Teachers will have a zeal for learning, a love of their subject matter, a sense of wonder, and the ability to share that wonder and knowledge with students.

HCA teachers will attend an annual summer conference focused on classical education. This will be a chance to reflect on their work and prepare for the coming academic year. They will hear featured speakers and attend several days of related sessions. Building upon the mission of HCA, teachers will attend regional and national Charles R. and Kathleen K. Hoogland Center for Teacher Excellence seminars related to classical curricula and subject mastery.

Teachers may participate in Professional Learning Communities (PLC) that are focused on skills and knowledge related to teaching classically. For example they might read the same book and participate in group discussions. This is common practice and helps to create a culture of learning focused on pedagogy, skills, and knowledge to improve student achievement.

Teachers will be encouraged to join professional content area organizations. They will be encouraged to attend relevant subject area conferences at the national and state level, and will be provided information on and access to NCDPI offerings.

Provide parents and students with expanded choices in the types of educational opportunities that are available within the public-school system.

The school will be rooted in the liberal arts and sciences, offering parents and students an outstanding choice in education while building lifelong character traits that will serve students well throughout the entirety of their lives.

An emphasis on the values found in the Western tradition, in history, literature, philosophy, and the fine arts will equip students for citizenship. Well-educated and articulate teachers will be central to the classroom, providing content-rich direct instruction to build up students in knowledge as well as in academic skills.

Foundational character traits, once a common focus in traditional education, tend to receive less formal focus in today's public schools. These traits include but are not limited to responsibility, respect, courage, courtesy, honesty, and citizenship. Highlands Charter Academy will provide firm grounding in the principles of moral character and civic virtue.

Improving student learning.

Emphasizing foundational skills and rich content, Highlands Charter Academy teachers will not only effectively bring students with academic problems up to grade level but also strengthen the



knowledge base and nurture the academic potential of every student at or above grade level.

Because children learn by building on what they already know, our curriculum will benefit students with varying learning abilities. Highlands Charter Academy has selected Core Knowledge, Literacy Essentials, and Singapore Math because these programs build foundations of knowledge in the elementary years. We will endeavor to add supplemental programs for Exceptional Students to provide enrichment, interventions, and remediation.

The curriculum is balanced and strong across the four core disciplines of math, science, literature, and history, with explicit phonics instruction leading to reading fluency and explicit grammar instruction leading to language mastery.

8.3. Goals for the Proposed Charter School

Q94. Provide specific and measurable goals for the proposed school for the first 5 years of operation outlining expectations for the proposed school's operations, academics, finance, and governance. Address how often, who, and when the information will be communicated to the governing board and other stakeholders.



OPERATIONS

- HCA will comply with all applicable laws, regulations, and terms of the charter contract.
- Each year a survey will measure parent/guardian satisfaction. 90% of families will be satisfied to be a part of HCA and 90% of families will remain at the school the following year.
- HCA will serve at 100% capacity each year.
- HCA will have an average daily attendance of over 90% each year.
- 90% of teachers will report they are professionally satisfied at HCA and 90% of teachers will remain at HCA each year.

ACADEMICS

In five years, Highlands Charter Academy will have grown to cover K-6th grade. The school will have aggressive goals. At the end of the 2029-30 school year:

- The school will maintain an NC Report Card grade of B or better in each year of existence.
- The data for 2020-21 for the LEA shows 54.7 for Math proficiency and 53.6 for Reading proficiency. By the end of its 3rd year, 75% of HCA students in 3rd and 4th grades will score at least 8% higher than the LEA proficient levels in Reading and at least 15% higher in Math. Both percentages will grow each year.
- By the end of the fifth year for the school year 2029-30, HCA will be K-6. 85% of 3rd-6th grade students will score at least 10% higher than the LEA proficient levels in Math and at least 20% higher in Reading.

FINANCE

A financial report compiled by an outside financial management firm will be submitted monthly by the Headmaster to the Board. It will include the budget, funds received, and funds expended.

Performance towards the following financial goals will be analyzed:

- The annual audit will show no deficit and no adverse compliance findings.
- 100% of invoices will be paid on time.
- The school will maintain a high credit rating.
- At least 5% of the base budget will be carried over each year.

GOVERNANCE

Governance goals will be reviewed at monthly Board meetings and at the annual retreat and updated as needed.

- The Board shall conduct a minimum of 11 regularly scheduled meetings and one retreat each year and will meet quorum at each meeting.
- Each governing Board member will complete a formal evaluation of the Headmaster and board self-evaluation annually.
- The Board will maintain engaged membership with no fewer than 5 members but will work to



have 7-11 diverse members who are invested in the community and dedicated to the mission of the school.

- Each Board member will positively represent the school to the community through memberships and involvement in community organizations and events. They will report activity and responses at Board meetings.

COMMUNICATIONS

The Highlands Charter Academy Headmaster will attend the monthly Board of Directors meetings and provide the Board with a school progress report as data becomes available throughout the academic year. The report will highlight areas of growth and weaknesses through records, benchmark assessments, writing rubric samples, and EOG scores. Plans will be put in place to assist with academic issues. The school progress report will also provide the board with a behavior and attendance report and plans will be put in place to assist with any attendance issues.

Annually, the board will hold a retreat that will analyze the data from the yearly school academic progress report, average daily attendance, teacher and parent surveys, and retention. All of this information will give the board a very comprehensive understanding of how well the school is working towards attaining its mission and will help the Board set goals for continuous improvement each subsequent year.

Q95. How will the governing board know that the proposed public charter school is working toward attaining their mission statement?



The Board of Highlands Charter Academy will be actively involved in assessing how well the school achieves its mission. It will meet once a month and receive updates on the school's performance from the Headmaster.

As part of the planning year process, the Board will work closely with the Headmaster to ensure the school's alignment toward achieving the adopted goals. This process will entail the development of a Strategic Plan for approval by the Board that provides specific action to achieve each performance goal.

The Board will acquire resources and follow recommendations, receive support and training from governance experts in the field, and support from the NC Office of Charter Schools.

At the beginning of every academic year, the Board will present objectives for the school in alignment with the school's mission, vision, and measurable goals. The Board will track these goals to ensure they are being met. The Headmaster will present reasons for deviations or shortfalls along with corrective actions. The Board will direct the initiatives necessary to implement steps to reach goals not attained.

The Board will develop committees to measure and analyze the school's desired outcomes in academics, finance, marketing, and governance. These committee members may consist of board members, parents, community members, field experts, and teachers.

Committee Responsibilities include but are not limited to:

- Each committee will have specific roles and responsibilities, including analyzing deliverable data from the operational oversight and program evaluations.
- Committees will be assigned specific goals for oversight, data analysis, and solutions to identified issues. These committees will report to the Board trends and results from data analysis and recommended adjustments to the education plan, curriculum, instructional methods, and school operations.
- The committees will provide specific scheduled reports to the Board seven days before a Board Meeting. These reports and strategic questions will drive the discussion and Board action to navigate the school toward its mission.

The Headmaster will be responsible for developing plans of action and solutions. Some steps may require board approval (i.e., curriculum, standards, academic calendars).

Mission success will also be gauged by demand within the community for enrollment in the Academy and the school's overall organizational health. The Headmaster will keep the Board apprised of the number of enrolled seats currently filled and the number of prospective students on the waiting list.

Students, parents, and community members will be encouraged to share observations with the



Headmaster both informally, as concerns and suggestions arise, and formally during an annual end-of-academic-year survey of parents and teachers. The Headmaster will report the survey results at the first regularly scheduled board meeting after a survey closes. Other suggestions and concerns will be communicated to the Board as needs occur.

The Board will analyze data annually to determine organizational health through a teacher survey, turnover, and critical partnership feedback.



9. Educational Plan

9.1. Instructional Program

Q96. Provide a detailed description of the overall instructional program of the proposed charter school, including:

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



Instruction at Highland Charter Academy will be delivered using a variety of instructional methods determined by the course content, learning objectives, and student need. Instructional design will include differentiation according to content, process, and product to meet the needs of the entire student population.

Program Guide

A K-12 Program Guide will provide to teachers the topics to be taught, a recommended order in which to teach them, a list of vetted and reviewed books, primary sources, and other resources for teachers and students alike. The Program Guide is a careful compilation that, when taught using pedagogical principles founded in the classical education tradition and as demonstrated by the best teachers, our students will experience a world-class American classical education.

The Program Guide that will be provided to our teachers opens with a series of short essays introducing each subject and how it may be approached in light of classical teaching principles, regardless of grade level. They will begin by reading the essays.

Teachers of grades K-8 begin with curriculum maps outlining suggested pacing on a month-by-month basis. They will list each week in the school year and then assign each topic to a specific numbered week. They will allot time for teaching sound academic skills, tests, and additional school-wide activities. A review of their curriculum maps and reference to them on a weekly or biweekly basis will keep the class on pace.

The Program Guide will outline recommended resources (mostly books) at the beginning of each subject in each grade level. Most subjects categorize the resources into two kinds: (1) those for teachers to use before class as they plan and (2) those assigned for students to read or from which to practice a skill.

Core Knowledge

The K-6 History and K-8 Science, Art, Music, and Literature portions will be based on the Core Knowledge® Sequence, ©2010 by Core Knowledge Foundation. The Core Knowledge Sequence is the most content-rich curriculum now available for grades K-8 in subjects from history and science to art and music. It focuses squarely on content rather than on skills.

Students will read about basic geography, history, and science, and memorize facts, dates, names, places, and events. With this wealth of knowledge, they will form reasonable and coherent opinions, craft good arguments, and be equipped to seek out deeper and broader knowledge. Background knowledge is vital for increased reading ability, interest in school, improved memory, and understanding abstractions and meaning.

Literacy, and Grammar



The Literacy portion in the early grades at Highlands Charter Academy will be based on Literacy Essentials: The Journey from Spelling to Reading®, by Dorothy Kardatzke and Melody Furno. This is grounded in the Orton-Gillingham method of phonics instruction.

According to the National Institute of Literacy, systematic and explicit phonics instruction significantly improves kindergarten and first-grade children’s word recognition, spelling, and reading comprehension.

We will teach our students the essential building blocks of English to give them a thorough understanding of the language so as to develop strong reading, writing, and spelling. We will teach them how words work, rather than having them memorize the pronunciation of whole words by sight recognition, and we will discuss all the different sounds a letter or letter combinations may make. In spelling we will teach all the ways a sound may be spelled. This approach to teaching reading and spelling is known as “explicit phonics.” It includes systematic instruction that guides young students using a step-by-step, logical sequence that allows them to decode words.

Beginning in Kindergarten, students will learn the “basic code” of English: 71 phonograms for 43 elementary sounds, which compose almost every English word. Phonograms are the primary and most basic components of an explicit phonics program. Our students will also learn 47 different spelling rules that help them combine phonograms in correct writing. Because English is a mixture of several languages – principally Anglo-Saxon, and German, and French and Latin—students are helped if they learn explicit rules to make sense of English’s richness and variety, and, yes, unpredictability.

This curriculum, which requires students to hear, to say, and to write phonemes, also develops habits of care, neatness, and patience from an early age - qualities that are also an integral aspect of the Classical education we plan to offer our students.

The 3-6 Grammar portion will be based on the Well-Ordered Language series by Tammy Peters and Daniel Coupland, Ph.D, ©Classical Academic Press.

Mathematics

The K-6 Mathematics portion will be based on the Singapore Math® curriculum. The Singapore Math method is a highly effective teaching approach originally developed by Singapore’s Ministry of Education for Singapore public schools. The method has been widely adopted in various forms around the world over the past twenty years following its introduction of the curriculum to the U.S. in 1998.

Singapore Math is a cohesive, deep, and focused mathematics curriculum for kindergarten through seventh grade with the goal of developing algebraic thinking. Algebra is a systematic approach to describing patterns and relationships and finding unknown numbers or quantities. It is a complex



tool and body of knowledge, requiring strong mathematical skills. The explicit study of algebra begins in eighth grade, and the Singapore Math curriculum is the strongest available to prepare students for that challenge.

The Singapore Math curriculum presents math problems first concretely, then pictorially, and only after these steps are they presented in abstract terms that we recognize as an algorithm. For instance, students might begin with a problem of adding apples, say 2 apples and 1 apple. They might use disks, blocks, or other objects that illustrate more and less and what it is to regroup. The next step would have them represent the problem on paper, using units, like 1s, 10s, and 100s. Finally, they would encounter the problem as $2+1=3$. The benefit of this multiple representation approach, which treats the algorithm as present all along but not uncovered immediately, is the principal way in which Singapore Math develops number sense.

This curriculum differs from programs where students get a worked example and then solve problems that very closely follow that example, repeating all the same steps with different numbers. In Singapore math, students must think through concepts and apply them in new ways from the very start. Since they can't rely on simple replication, students are pushed to greater engagement and broader thinking. We prefer it to programs where concepts and skills are compartmentalized within and across grade levels. In Singapore math, a strong sense of connectivity to past learning is woven throughout.

Singapore math not only helps students become more successful problem solvers, it helps them gain a sense of confidence and resourcefulness because it insists on conceptual depth. This naturally prepares students to excel in more advanced math.

Reading

Highlands Charter Academy will be a "Back to the Books" school. We believe in the importance of books in a child's education. We believe that content matters. In other words, it matters what our students read. The books in our curriculum are time-tested to be instruments that properly shape our students' moral imaginations.

In earlier years, this means reading and discussing classics such as *Aesop's Fables*, classical myths, the stories of the Old Testament, *The Tales of King Arthur*, American folk tales like *Rip Van Winkle* and *The Legend of Sleepy Hollow*, *Winnie-the-Pooh* and *The Tales of Peter Rabbit*, *Alice in Wonderland*, *Treasure Island*, *Sherlock Holmes*, *Robin Hood*, *Anne of Green Gables*, and *Heidi*.

Later in the high school years it will mean reading great works of literature like the plays of Sophocles and Shakespeare, epics such as *The Odyssey* and *The Aeneid*, short stories by authors such as Nathaniel Hawthorne and Flannery O'Connor, and classic novels by great authors such as Austen, Dickens, Twain, Melville, Dostoevsky, Orwell, Kafka, and Solzhenitsyn.



In history classes, students will access books that provide compelling narratives of important events and important lives. For example, the autobiographies of Benjamin Franklin, Anne Frank, and Frederick Douglass and enduring works of non-fiction like Machiavelli's *The Prince*, de Tocqueville's *Democracy in America*, and Booker T. Washington's *Up From Slavery*.

Highlands Charter Academy will provide suggested books by grade for summer reading. These suggestions are intended to enhance, not burden, summer break. Lists will contain high-quality reading material that will prepare the children for the coming school year.

Latin

Highlands Charter Academy's Latin program will begin in fourth and fifth grades with the systematic study of Latin and Greek roots. In middle school, all students will study Latin with the option to continue through their senior year of high school, culminating with the AP Latin course or comparable class, where they will be reading major Roman authors such as Vergil, Cicero, Caesar, Catullus, Ovid, and Tibullus. Students who enter into the school in ninth grade or tenth grade will take Latin during high school.

Latin has been called an "eternal language" because of its continuing influence on western civilization for more than two millennia, even though it is no longer spoken. The perennial question remains: "Why study Latin?" Here are just a few advantages of becoming a student of Latin:

- Latin improves reading, writing, and speaking skills.
- Latin expands English vocabulary as much as 85% of advanced reading vocabulary comes from Latin and Greek.
- Latin grammar instruction provides students with a grasp of how language works. This helps with English but also provides a way to evaluate the language structure of non-Romance languages, making second- or even third-language acquisition much easier.
- Latin provides a key to learning the modern (Romance) languages French, Spanish, Portuguese, Italian and Romanian - which are all descendants of the classical language.
- Latin enhances problem-solving abilities.
- Latin aids in mathematical competency.
- Latin introduces the terminology of science and of many other academic fields.
- Latin raises standardized test scores.

Science

Science should be approached with respect and wonder at the knowledge that has been gained. We are right to be impressed, even overwhelmed, by how well we have come to know our universe. This means that at Highlands Charter Academy, we believe that science should not be studied primarily for the acquisition of technical skills and knowledge necessary to secure a lucrative job in the STEM professions. We want science education to be richer and deeper. With our classical approach to science classes, students will experience the sense of wonder and delight as they consider the stars



in the sky, the phases of the moon, the creatures in the sea and sky, the engineering feats of Leonardo da Vinci, the human body's ability to heal itself, and so on.

At Highlands, a serious study of science will begin in early elementary school and build in breadth and depth in the high school. When students graduate from Highlands, our goal is for them to have an accurate understanding of the fundamental content: the models, theories, and laws of biology, chemistry, earth science, and physics. Therefore, our primary motivation for including science at every grade level, from K-12, is that it contributes to understanding ourselves and our surroundings. As such, science is complementary to the humanities in that they study different dimensions of truth both of which are necessary to provide a satisfactory account of reality.

From the combined effect of the science curriculum, HCA students should learn that we live in an orderly and intelligible universe that can be understood through careful, systematic investigation. They should also realize that science is a part of the innate human desire to know and understand, closely related to big questions that humans have always asked about the nature of reality.

By the time they graduate, HCA students should also have an accurate understanding of the process of science, achieved both through personal lab experience and historical study. They should have a deep appreciation for science—not because they are necessarily going to be future college science majors, but rather that our hope is that each student would be moved and impressed by their study of science regardless of their primary academic interests.

History and Civics

The goal of American history and civic education is to foster a humility that helps students recognize that the world in which we live, with all its benefits and also its faults, is not of our own creation.

At Highlands Charter Academy, we believe that the United States of America is a remarkable country. Our civics education and, specifically, the teaching of American history, will reflect that belief. We want our students to develop the skills essential for good citizenship - and we believe a cogent and ongoing study of the past is necessary to help us develop judgment in both local and world affairs as we seek to understand the past behavior of people and societies. Such an approach can enable us to see how the community, nation, and world we live in came to be. History can further inspire us when it demonstrates that a single individual or a committed group with great conviction can change the world.

We will insist that our students are taught honestly, using a curriculum that presents a fair and comprehensive view of our nation's history. As an essential part of our K-12 history sequence, we plan to use the Hillsdale 1776 Curriculum to accomplish this goal. The curriculum covers the triumphs and tragedies of American history honestly and comprehensively. It determines what students should learn in history and civics based on the answers to a single question: What ideas, words, and deeds have most significantly formed the world into which our students were born?



Studying the answers to this question will provide students the fullest understanding of the world in which they will live their lives.

Classroom walls will be places for images of the past - facsimiles, maps, portraits and paintings from American history.

Assessment Strategies

HCA will use a variety of assessment strategies to measure student achievement, growth, and school quality. These assessments will help guide instruction, provide feedback to students and teachers, and to ensure that the school is meeting high standards of academic excellence.

Assessments may include but will not be limited to:

- North Carolina Standardized End-of-Grade (EOG) and End-of-Course (EOC) assessments.
- Formative assessments to monitor student progress throughout the school year. Such assessments can include quizzes, homework assignments, and classroom projects. Teachers will be able to identify areas where students may be struggling and to provide targeted instruction and support.
- Performance tasks such as writing assignments, research projects, and scientific experiments.
- Summative tasks such as unit tests and final exams.
- Student Portfolios may be used to track student progress and to showcase student work. Portfolios can include samples of student writing, artwork, and other projects that demonstrate student learning and growth over time.
- Teacher and Headmaster Observations: Observations will provide feedback and support to teachers. Administrators and other teachers may observe classrooms and provide feedback on instructional strategies, classroom management, and other aspects of teaching.

How does this instructional program and model meet the needs of the targeted student population?

This is answered for Question 102.

Applicant Comments :

We are also providing an article from the think tank, The Manhattan Institute, *Classical Education: An Attractive School Choice for Parents* by Brandon McCoy.



Applicant Evidence :



Manhattan Institute ...

Uploaded on **4/25/2023**
by **Karen Manning**

Q97. Will the proposed charter school serve a single-sex student population?

- Yes
- No

Q101. **Curriculum and Instructional Design** Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure for each grade span (i.e. elementary, middle, high) the school would ultimately serve.



BASIC ENVIRONMENT

The learning environment at Highlands Charter Academy will be primarily teacher-led and classroom-based - with the walls of each classroom used for all kinds of art and other materials to support learning.

Behavioral expectations will be clearly defined and consistently reinforced through both instruction and school culture. Academic and personal integrity are essential to the success of our educational mission. As Aristotle stated, "Good moral character is not something that we can achieve on our own. We need a culture that supports the conditions under which one becomes good and friendship flourishes." Positive contributions to the classroom and to the school will be a valued norm.

CLASS SIZE

Highlands Charter Academy will open as K-2 with two classes each and add a grade level each year. The maximum number of students for each grade this five-year charter covers will be: Kindergarten-18 students, Grade 1-18 students, Grade 2-20 students, Grade 3-22 students, Grade 4-22 students, Grade 5-24 students, and Grade 6-25 students.

HCA plans to add a grade each year until 12th grade is reached. As of now, it is impossible to determine how many classes of the upper grades will be demanded in Moore County.

Enrollment Numbers:

- Year One (2025-26): Kindergarten and first grade will have two classes with a maximum of 18 students each and second grade will have a maximum of 20 students, two classes; 112 students total at the opening.
- Year Two (2026-27): Addition of one Kindergarten, one first, and one second grade class, and two third grade classes with a maximum of 22 students each for third grade; 212 total students.
- Year Three (2027-28): Addition of one Kindergarten, one first, one second, and one third grade class of two classes fourth grade with a maximum of 22 students each; 334 total students.
- Year Four (2028-29): Remain at four classes each K-2, addition of one class for third and fourth grades, and the addition of three fifth grade classes with a maximum of 24 students each, 450 total students.
- Year Five (2029-30): Remain at four classes each K-3, addition of one class for grades four and five, and the addition of six six grade classes with a maximum of 25 students each; 646 total students.

CLASS STRUCTURE

HCA's class structure will provide a challenging academic experience that emphasizes traditional subjects and teaching methods. The goal is to help students develop a strong foundation of knowledge and skills to prepare them for a meaningful and productive life.

Students will be grouped into grade levels with each grade level having a specific curriculum and set



of academic expectations.

Core subjects (language arts, mathematics, science, history, etc.) will be taught in a sequential and systematic way, with a focus on building a strong foundation of knowledge and skills.

HCA will utilize the Socratic method of teaching, which involves asking students open-ended questions to encourage critical thinking and discussion. This will help students develop analytical and reasoning skills.

The school will have a strong disciplinary focus, with strict rules and expectations for behavior and conduct. The intention is to create a structured, focused learning environment that fosters academic success.

Q102. Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model. Provide evidence that the chosen curriculum has been successful with the target student population, how the plan will drive academic improvement for all students, and how it has been successful in closing achievement gaps.



Curriculum Alignment with HCA Mission

Highlands Academy' mission is to cultivate lifelong intellectual curiosity in its students through a traditional, content-rich classical education that emphasizes virtuous living, moral character, and civic responsibility, equipping students to live well-ordered lives. The curriculum was chosen because it closely aligns with the Academy's mission. It is designed to nurture the body and spirit as well as the mind. Extracurriculars will be designed to enhance the curriculum and will work to develop character and integrity in students.

Screenings, diagnostic and achievement assessments will provide data to determine student need. Highlands Charter Academy will implement Multi-tiered Systems of Support (MTSS) and the Response to Intervention (RtI) model. The classical curriculum design has stood the test of time as it was used by the greatest thinkers and the founders of our county.

Curriculum Alignment with the Student Population

The curricula will develop in its targeted population intellect, critical-thinking, decision-making skills and personal habits upon which productive and responsible lives are built. These factors are necessary to have a free and just society. In addition to the core curriculum, Highlands Academy will offer enrichment and remediation during the school year to provide appropriate support for all students.

Curriculum Alignment with the NC Accountability Model

Classical curriculums such as will be offered at HCA closely align with goals set forth on the NC Accountability Model. HCA students will meet or exceed proficiency standards on standardized tests in reading, math, and science. Students will prove academic growth over time, based on their performance on standardized tests. A very large majority of students, if not all, will graduate from high school within four years. A good percentage of students will enroll in Advanced Placement courses or participate in career and technical education programs. The percentage of students who are chronically absent will be extremely low.

Evidence Curriculum Provides Academic Improvement for All

Evidence suggests that a classical model of education drives achievement. A study conducted by the Great Hearts Academies, a network of classical charter schools, found that their graduates were more likely to attend and graduate from selective colleges and universities compared to their peers in traditional public schools. The study also found that graduates were more likely to major in subjects such as STEM and the humanities.

The solid, classical liberal arts curriculum, coupled with a literacy program based on the science of reading will provide strong academic success for all students. Classical education emphasizes the



development of critical thinking and analytical skills, which can be particularly beneficial for children who may face academic challenges due to limited educational resources at home or in their community. Recent studies have shown that the content-rich approach, developed and promoted by the Core Knowledge program enable reading and learning success with children from all backgrounds.



Please review the recent research attached entitled "A Kindergarten Lottery Evaluation of Core Knowledge Charter Schools: Should Building General Knowledge Have a Central Role in Educational and Social Science Research and Policy?" The researchers hypothesize that the Core Knowledge curriculum leads to increased reading comprehension and achievement by building students' general knowledge about the world in which they live.

Proven Success Closing Achievement Gaps

Research continually proves that students in classical charter schools, which emphasize a classical education model, outperformed students in traditional public schools on standardized tests in math and reading. Studies also show that students in classical charter schools showed greater academic growth over time compared to their peers in traditional public schools.

Please review the recent article uploaded from Forbes magazine entitled "Dramatic New Evidence That Building Knowledge Can Boost Comprehension And Close Gaps" for information as to how Core Knowledge education closes gaps for students from low-income families and reading comprehension success.

Applicant Evidence :

	
Dramatic New Evide...	Evaluation of Core K...

Uploaded on **4/25/2023** by **Karen Manning** Uploaded on **4/25/2023** by **Karen Manning**

Q103. Describe the primary instructional strategies that the school will expect teachers to master and explain why these strategies will result in increased academic achievement for the targeted student population for each grade span (i.e. elementary, middle, high) the school would ultimately serve.



Highlands Charter Academy is returning to the curricula, materials, and methods that have traditionally been used to educate generations of young men and women who have helped build our nation and preserve Western civilization. These include teacher-led classrooms, low technology, intensive phonics, and traditional mathematics instruction. Our students will do the hard work of thinking about and discussing big ideas and important events. They will diagram sentences, explore the natural world through the rigorous study of science and mathematics, study Latin, learn to write in cursive, and understand the founding documents and principles of our country.

We will actively focus on developing the whole person—heart, mind, body, and soul. As a result, students will be equipped with the tools to be self-disciplined and intellectually competent, with strong moral character and civic responsibility. Honesty, integrity, and responsibility will be strongly emphasised. Teachers will be expected to model the classical virtues (i.e., prudence, diligence, patience, courage, faith, humility, and charity).

Classical school classrooms are characteristically well-managed, peaceful, and respectful learning environments. It is known that even in schools with an “average” curriculum, performance improves when the environment improves. Character correlates to achievement. HCA will place a high value on order and discipline in the classroom. Students are expected to follow rules and procedures, and disruptive behavior will not be tolerated. They will be expected to dress neatly, speak respectfully, and show deference to the teacher and to other students.

The Socratic method is commonly used in classical education, and will be implemented at HC because it is a key method for developing analytical and reasoning skills in students. In it, the teacher poses a series of questions to students that encourage them to think deeply about a particular topic or issue. The questions are designed to probe the student's understanding of the topic and to challenge them to think more deeply about it. The teacher typically asks follow-up questions to encourage students to explore their ideas further and to clarify their thinking. The Socratic method is intended to help students develop their critical thinking skills by encouraging them to examine their own beliefs and assumptions, consider alternative viewpoints, and draw logical conclusions based on evidence and reason. It is a highly interactive and engaging teaching method that encourages students to participate actively in the learning process and to take ownership of their own learning.

For younger students, a modified version of the Socratic method will be used. Teachers can use leading questions to prompt students to think critically about a particular topic or issue, use stories to stimulate critical thinking and engage students in discussion, and facilitate group discussions in which students are encouraged to share their ideas and listen to others. The teacher can pose open-ended questions that encourage students to think deeply and engage in thoughtful conversation. They can use role-playing exercises to encourage students to think about different perspectives and viewpoints. Students can take on the roles of characters in a story or historical event and explore the issues and conflicts from different angles.



Proven study skills, such as memory techniques, organizing, note-taking, research methods, and time management are additional distinctive qualities of a classical curriculum.

Primary source materials within the appropriate context in history instruction will be used. Especially in the upper grades, artifacts, documents, recordings, or other sources of information created at the time can bring to life the complexity and motivations of history and equip students with insight into the nation-building process.

There is evidence to suggest that such a school environment can be particularly beneficial for students from low-income backgrounds. The traditional approach to instruction, with the teacher presenting information and students listening and taking notes, can be particularly effective for students from low-income backgrounds. It provides clear structure and expectations, which can be reassuring for students. HCA will help students overcome the challenges of poverty and achieve academic success.

Q104. Explain how the proposed instructional plan and graduation requirements will ensure student readiness to transition from grade to grade and to the next grade span upon program completion.



Highlands Charter Academy will ensure student readiness to transition from grade to grade and the next grade span upon program completion. The curriculum and the course of study will articulate K-12 to allow for transition and program completion. Student progress will be monitored throughout the year and quarterly report cards will be issued. Students with Individualized Educational Plans (IEPs) will have monthly progress monitoring. Teachers will ensure all assessments are aligned to standards in rigor and depth, which will be consistent in each grade level. There will be a school-wide data tracking system. In addition to the data tracking system, teachers will keep a student portfolio of assessments, work samples, and anecdotal observations that provide evidence of mastery and growth.

There will be an intentional development towards student mastery of skills as well as the sequential building of knowledge through multiple exposures to topics and vocabulary in all subject areas. This will be based on a roadmap which will enable teachers to assess and analyze any potential gaps in student knowledge. Highlands Charter Academy will utilize formative and summative assessment data to engage in conversations with children and families regarding the student's strengths, opportunities, and specific concepts needed to be mastered for promotion.

To be eligible for promotion and high school graduation, students will need to complete and pass an end-of-course assessment and to display a proficient level of skills and knowledge in core subject areas with a minimal score of 70%. In addition, students in grades 2-12 will complete benchmark assessments in Reading and Mathematics four times a year.

Teachers will only transition students to the subsequent grade once they have demonstrated a firm grasp of the learning goals laid out in each core subject area. Highlands Charter Academy's grade-level promotion requirements will be evaluated annually to create a culture of high-achievement opportunities for all. These requirements will be communicated to parents and students throughout the academic year, and will align with state graduation requirements.

Students who do not demonstrate proficiency will be offered opportunities to access and learn the skills and knowledge in alternative ways, and given ample opportunity to practice and access the knowledge and skills needed. Teachers will use the data gathered from student assessment and observation to group and instruct students based on their individual needs during small grouping in literacy and math blocks.

Our instructional program is designed to ensure children of diverse learning capacities are accommodated. The educational program, instructional plan, and promotion requirements are specifically designed to successfully transition each student to the next grade. The comprehensive curriculum plan will not only prepare students academically through a rigorous and relevant curriculum but will also ensure that students have appropriate personal/social skills as expressed in our vision statement.



Q105. Describe in a brief narrative how the yearly academic calendar coincides with the tenets of the proposed mission and education plan.

The Highlands Charter Academy school calendar will roughly align with the Moore County Schools calendar to accommodate families with students in both systems. HCA will operate on an 8-hour day, including lunch, recess, and structured times for collaboration, remediation, and enrichment.

The school will collaborate with community organizations to offer before- and after-school care. This service will help busy families with childcare needs and provide additional enrichment, remediation services, and opportunities. Before-school care will run from 7-8 am, and after-school care will be 3-5 pm.

Teachers will have four days before the first day of school to set up their classroom, create lesson plans and activities, review their curriculum and standards, prepare materials, review student records and information, attend meetings with administrators, fellow teachers, and support staff to discuss school policies, procedures, and expectations, and participate in professional development workshops or training sessions.

Following every assessment cycle, teachers will have a professional workday to analyze student progress and adjust their planning accordingly. Following progress reports, teachers will have a day of scheduled conferences with parents and students to update families on their child's progress, communicate significant accomplishments and growth, and discuss priority areas for improvement. This schedule allows for 185 school days.

Q106. Describe the structure of the school day and week. Include the number of instructional hours/minutes in a day for core subjects such as language arts, mathematics, science, and social studies. Note the length of the school day, including start and dismissal times. Explain why the school's daily and weekly schedule will be optimal for student learning.



The typical school day at Highlands Charter Academy will be 7 hours long, from 8 am until 3 pm. The time spent in each core subject will be:

Language Arts (literature, phonics, grammar, literacy):

Elementary: 90-120 minutes a day, broken up into smaller segments throughout the day, with individual lessons ranging from 20-45 minutes each

Middle & High School: School: 60-90 minutes a day

Reading and writing activities will be incorporated into other subjects such as social studies, science, and math.

Social Studies (history, geography, economics, civics, government):

Elementary: 45-60 minutes

Middle & High School: 60-90 minutes

Visual Arts and Music:

Elementary: 30-60 minutes a week

Middle & High School: 45-90 minutes a day

Music and art activities will be incorporated into other subjects such as language arts, social studies, and science. Additionally, students may have after-school art and music clubs or extracurricular activities to participate in.

Science:

Elementary: 30-60 minutes

Middle & High School: 60-90 minutes

Math:

Elementary: 45 minutes

Middle & High School: 60-90 minutes

Foreign Languages & Latin:

Elementary: 30-45 minutes per week

Middle & High School: 45-90 minutes a day



Two recess periods will be built into the daily schedule to allow for physical activity, socialization, and stress relief.

Structured times for collaboration, remediation, and enrichment will be built into the schedule.

As currently envisioned, Highlands Charter Academy will operate on a block schedule for Middle School:

- Block 1: Language Arts (90 minutes)
- Block 2: Math (90 minutes)
- Block 3: Science and Social Studies rotation (90 minutes)
- Lunch (30-45 minutes)
- Block 4: Elective (60-90 minutes)

Elective classes may rotate during the week and include art, music, foreign language, physical education, gifted and talented programs, or special education services.

High School will begin in 2023. This Charter will be renewed in 2030. This portion may be revised at that time.

As currently envisioned, Highlands Charter Academy will work on a block schedule for high school:

- Block 1: English/Language Arts (90 minutes)
- Block 2: Math (90 minutes)
- Block 3: Science and Social Studies rotation (90 minutes)
- Lunch (30-45 minutes)
- Block 4: Elective (60-90 minutes)

Elective classes may rotate during the week and include art, music, foreign language, physical education, gifted and talented programs, or special education services.

Q107. Describe a typical day for a teacher and a student in the school's first year of operation.



TYPICAL DAY FOR A TEACHER

HCA teachers will arrive between 7 and 8 am and begin preparing for their day. They will set up their classrooms, possibly grade papers, and review lesson plans for the day. As students arrive, they will warmly greet each child and assist them as they settle in for the day. After taking attendance, the teacher will make announcements. As the day gets underway, a math lesson will be taught, followed by a history lesson. Around 10 am, the class will take a break, go to the restrooms, get some water and perhaps a snack, and possibly go outdoors for a short recess to allow the youngsters to move around, stretch, and socialize. After this break, they will all return to the classroom and have a reading or grammar lesson followed by a science lesson before lunch. Around 11:45, a lunch break will be followed by recess. All will return to the classroom at 12:45 for reading time (individually or with the teacher). From 1:15-2:15, the class will have a special subject class, such as art, music, or go to the library. Then at 2:15, students would work in small groups, or students who need extra help, remediation, or enrichment may work individually with the teacher or assistant. As the school day draws to a close, the students will help the teacher straighten up the classroom, organize materials, and prepare for the next day. After the students have left, the teacher will attend after-school meetings, grade papers, prepare lesson plans, or attend professional development workshops. Every few weeks, students will have an early dismissal day for teachers to have team-building exercises, professional development, etc.

TYPICAL DAY FOR A STUDENT

HCA students will arrive at 8 am, settle in, and receive morning announcements from their teacher. First on the agenda for the day may be a math lesson with activities. Around 9:15, they will enjoy a history lesson and be given a break around 10 am. After returning to the classroom, the students will have a reading or grammar lesson with activities and take their lunch break at 11:45, followed by recess. From 12:45-1:15, the class will enjoy reading time (individually or with the teacher), and from 1:15-2 they will have a special subject class such as art, music, or go to the library. After this, from 2-3, they may work in small groups or with the teacher or assistant if extra help, remediation, or enrichment is needed. At 3:00, they will pack up and be dismissed.

Q108. Will this proposed school include a high school?

- Yes
- No

Q109. High School Graduation and Post Secondary Readiness Describe how the proposed charter school will meet the Future-Ready Core requirements.



The ninth grade will begin at Highlands Charter Academy in 2032 and by adding a grade in subsequent years, HCA will have all grades for high school in 2035 and celebrate its first graduating class in 2026. Because the current charter application is for five years, these high school graduation requirements may be revised in the renewal process.

All Highlands Charter Academy students will have access to rigorous academic courses and high expectations. This is especially important for low-income and minority students, who too often lack equitable access to the challenging curriculum needed to succeed in the workplace, community college, or university. Our classical education will prepare students not only for college and the workplace but to be well-equipped as citizens to serve their families, community, state, and nation.

24 Credit Hours will be required for graduation:

- Literature 4.5
- History 4
- Math 4
- Science 4
- Foreign Language 3 (2 of same language)
- Fine Arts 1
- Personal Fitness/Health 1
- Additional HCA Requirements 2
- Electives .5

Below is a visual representation of a sample curriculum.



High School Curriculum						
Area of Study	Req. Credits	Duration	Ninth	Tenth	Eleventh	Twelfth
Literature	4.5	Year	Classical Lit	British Lit	American Lit	Modern European Lit. (with senior thesis)
		Semester	Composition			
History	4	Year	Western Civ I	Western Civ II	American History	Modern European History
Math	4 (during 9-12)	Year	Algebra I	Geometry	Algebra II	Pre-Calculus (or AMDM)
		Year	Geometry	Algebra II	Pre-Calculus	Calculus I or AP Calculus BC
Science	4	Year	Biology	Chemistry	Physics	Physiology
			Biology	AP Biology	Chemistry	Physics or AP Physics
			Biology	Chemistry	AP Chemistry	Physics or AP Physics
			Biology	AP Biology (Year) + Chem Intensive (S2)	AP Chemistry	AP Physics
Foreign Language	3 (in 9-12) 2 Credits of Same Language	Year	Latin III	Latin IV	Latin V	Latin VI or AP Latin
		Year	Spanish I	Spanish II	Spanish III	Spanish IV
Fine Arts	1	Semester			Fine Arts Comprehensive	Lessons in Wonder
Personal Fitness / Health	1	Semester	Personal Fitness	Health		
Additional ACA Requirements	2	Semester			Moral Philosophy	American Government Political Philosophy Economics
Electives	0.5	Semester	Students take one semester-long elective course any time during 9-12 grade. An elective course is any credit-earning course that is not listed as a graduation requirement elsewhere.			
Credits Required for Graduation	24					

Q110. Provide details on how the students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts, and what elective courses will be offered.



Earning Credit Hours

Credit hours will be earned by successfully completing a course. The number of credit hours HCA courses are worth will be determined by the number of hours per week the class meets (most are worth one credit hour per year). To earn credit for a course, students must attend class regularly and complete all assignments, projects, and assessments. They must achieve a passing grade and meet the required number of credit hours for the course (most courses will be worth one credit hour per semester, which means students must attend the class for the entire semester to earn credit).

How GPA will be Calculated

HCA Grade Point Averages (GPAs) will be calculated on a 4.0 scale (the total number of grade points earned will be divided by the total number of credit hours attempted). GPA will be based on the following scale: A = 4.0, B = 3.0, C = 2.0, D = 1.0, and F = 0.0. Credit hours will be assigned based on the number of hours per week a course meets, with most courses being worth one credit hour per semester.

Transcript Information

The HCA high school transcripts will include the following information:

- Student information: This will include the student's full name, date of birth, and gender.
- School information: This will include the name and address of the school, as well as the student's date of graduation.
- Coursework: Listed will be all the courses the student took during high school, including the course title, level, credit hours, and final grade.
- Grade point average (GPA)
- Class rank: The student's class rank based on GPA.
- Standardized test scores: The student's scores the SAT or ACT.
- Extracurricular activities: This section will list the student's involvement in clubs, sports, or other activities during high school.
- Awards and honors: Any awards, honors, or scholarships the student received during high school.
- Attendance record: The student's attendance record, including absences or tardies.

Elective Courses

High School will not begin at Highlands Charter Academy until 2032, three years after this five-year charter. The Board is making plans for the school to reach K-12. Some of the electives we hope to be made available to our high school students may include but will not be limited to are:

- Advanced Latin or Other Foreign Language Elective
- Studio Art



- Piano Performance
- Choir
- String Ensemble
- Personal Finance
- Art of Public Speaking
- Ethics
- Creative Writing
- Modern Philosophy
- Applied Philosophy
- Principles of Engineering
- Examining the Teaching Profession
- Introduction to Linguistics

Special Recognition for High School Students

High School will begin in 2023. This Charter will be renewed in 2030. This portion may be revised at that time.

To uphold the school's mission for academic rigor, Highlands Charter Academy will offer the North Carolina Academic Scholars Program. The scholars will receive a seal of recognition attached to their diplomas, may receive special recognition at graduation exercises and other community events, may be considered for scholarships from the local and state business/industrial community, and may use this special recognition in applying to post-secondary institutions (candidates will be identified by the end of grade 11).

Students must complete all the requirements of this North Carolina Academic Scholars Program and have an overall four-year un-weighted grade point average of 3.5. They must earn the minimum credits required in order to graduate.

Athletic Eligibility

High School will begin in 2023. This Charter will be renewed in 2030. This portion may be revised at that time.

In accordance with the North Carolina High School Athletic Association, any HCA High School student wishing to participate in school sports must pass a minimum load of three courses the semester prior to the sport in which they are participating.

Q111. Explain how the graduation requirements will ensure student readiness for college or other postsecondary opportunities (trade school, military service, or entering the workforce).



The ninth grade will begin at Highlands Charter Academy in 2032 and by adding a grade in subsequent years, HCA will have a complete high school in 2035. Because the current charter application is for five years, graduation requirements may be revised in the renewal process.

Our students will develop strong study habits and intellectual curiosity, which are essential for a thoughtful and reflective life, college success, and workplace enjoyment.

- Because HCA will offer a rigorous academic curriculum that will challenge students to think critically and engage with complex ideas, they will be college-ready or able to further their studies at a trade school, serve in the military, or enter the workforce).
- Because HCA will have an emphasis on reading and writing, our graduates will experience success in college. They will read challenging works of literature and philosophy and engage in extensive writing assignments, which will help them develop strong reading comprehension and writing skills.
- Because HCA will emphasize critical thinking and analysis, engage students in discussions and debates, analyze primary sources, and learn to think independently and critically about complex issues, students will be well-prepared for college or postsecondary opportunities.

24 Credit Hours will be required for graduation:

- Literature 4.5
- History 4
- Math 4
- Science 4
- Foreign Language 3 (2 of same language)
- Fine Arts 1
- Personal Fitness/Health 1
- Additional HCA Requirements 2
- Electives .5

Q112. Explain what systems and structures the school will implement for students at risk of dropping out and/or not meeting the proposed graduation requirements.



The ninth grade will begin at Highlands Charter Academy in 2032 and by adding a grade in subsequent years, HCA will have all grades for high school in 2035 and celebrate its first graduating class in 2026. Because the current charter application is for five years, these systems and structures may be revised in the renewal process.

Highlands Charter Academy will hold each student to the highest of expectations for demonstrating mastery and growth academically and developing character and behavioral traits of citizens of integrity and honor. All staff will take collective responsibility for ensuring each child experiences success.

Highlands Charter Academy will utilize the NC Multi-Tiered System of Support (MTSS) Model, providing support to all students. Educators at HCA will screen all students early in the school year, provide multi-tiered support to all students, increase levels of support for students that are struggling, collaborate in teams to assess students and plan interventions, frequently monitor students' progress and use this data to decide if more intervention is needed, and keep families informed and involved so they can understand the intervention process and provide support at home.

All students will receive Tier I support daily with rigorous classroom instruction. Following progress monitoring every six weeks, the teacher will meet in grade-level teams with the Headmaster to discuss their student's strengths, areas of weakness, and seek suggestions for intervention and strategies to support the entire class. Using diagnostic data, students will be broken into small groups that address different strengths and areas of need. Teachers will also work with the team to determine if individual students are "at risk" for not meeting grade-level standards or those with behavioral or emotional problems that may interfere with their academic growth.

For these students, teachers begin the intervention process at Tier II. The intervention will include additional small-group or individual support using a variety of resources similar to those used during core instruction but providing more time to practice, review knowledge, and develop skills needed to master the material. Interventions will occur 4-5 times per week for 20-30 minutes and will include more frequent progress monitoring. For students at Tier II, the intervention team (grade level teachers and Headmaster) will meet every month to assess the effectiveness of the intervention and whether or not to continue support at Tier II.

Students who do not make expected progress with Tier I and Tier II will receive more systematic, intensive intervention at Tier III. At this level, the student will receive additional one-on-one intervention with the classroom teacher, EC teacher, or a qualified interventionist four days a week using research-based programs provided by NCDPI MTSS LiveBinder Intervention Kit. Progress monitoring will occur weekly, and the intervention team, which will now involve the child's parent, will continue to meet each month. For students with behavioral concerns that interfere with the child's learning, a behavior contract will be established between the student, teacher, and parent to



develop specific behavioral goals with linked incentives. If adequate progress toward the student achievement goals is still not made with intensive, documented Tier III intervention support within two months, the intervention team will refer the student for Special Education testing.


Q113. Attach Appendix C: 9-12 Core Content Electives Provide a visual description of what courses (both core content and electives) will be offered at the charter high school to ensure students meet the proposed charter school's graduation requirements. Please ensure the projected staff and budget aligns with the course offerings.

See Q109, and attached, and also see Q110 which covers K-12.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

Total Files Count: 6

Applicant Evidence :


Appendix C Core Co...


Uploaded on **4/26/2023**
by **Karen Manning**

Q114. Attach Appendix B: Curriculum Outline per Grade Span (for each grade span the school would ultimately serve). One sample curriculum outline (in graph form) in the Appendices for one core subject (specific to the school's purpose) for each grade span the school would ultimately serve.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

Total Files Count: 5

Applicant Evidence :


APPENDIX B-Curricul...

Uploaded on **4/20/2023**
by **Karen Manning**

Q115. Attach Appendix D: Yearly Academic Calendar (minimum of 185 instructional days or 1,025 hours)



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

Applicant Evidence :


APPENDIX D- 2025-2...


Uploaded on **4/20/2023**
by **Karen Manning**

Q116. **Attach Appendix E: Daily and Weekly Schedule** Provide a sample daily and weekly schedule for each grade band (K-5, 6-8, and 9-12) the school ultimately plans to serve.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

Total Files Count: 15

Applicant Evidence :


Appendix E-Daily an...

Uploaded on **4/20/2023**
by **Karen Manning**

9.2. Special Populations and "At-Risk" Students

Q117. **Explain how the school will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies, and supports you will provide for these students.**



Highlands Charter Academy will identify and meet the learning needs of students who are performing below grade level through the utilization of the NC Multi-tiered System of Support (MTSS) Model. Educators at HCA will provide multi-tiered support to all students, increase levels of support for students that are struggling, collaborate in teams to assess students and plan interventions, frequently monitor students' progress and use this data to decide if more intervention is needed, and keep families informed and involved so they can understand the intervention process and provide support at home.

All students will receive "Tier I support" daily with rigorous classroom instruction. Following progress monitoring every six weeks, the teacher will meet in grade-level teams with the Headmaster to discuss their student's strengths, areas of weakness, and seek suggestions for intervention and strategies to support the entire class. Using diagnostic data, students will be broken into small groups that address different strengths and areas of need. Teachers will also work with the team to determine if individual students are "at risk" for not meeting grade-level standards or those with behavioral or emotional problems that may interfere with their academic growth.

For these students, teachers begin the intervention process at Tier II. The intervention will include additional small-group or individual support using a variety of resources similar to those used during core instruction but providing more time to practice, review knowledge, and develop skills needed to master the material. Interventions will occur 4-5 times per week for 20-30 minutes and will include more frequent progress monitoring. For students at Tier II, the intervention team (grade level teachers and Headmaster) will meet every month to assess the effectiveness of the intervention and whether or not to continue support at Tier II.

Students who do not make expected progress with Tier I and Tier II will receive more systematic, intensive intervention at Tier III. At this level, the student will receive additional one-on-one intervention with the classroom teacher, EC teacher, or a qualified interventionist four days a week using research-based programs provided by NCDPI MTSS LiveBinder Intervention Kit. Progress monitoring will occur weekly, and the intervention team, which will now involve the child's parent, will continue to meet each month. For students with behavioral concerns that interfere with the child's learning, a behavior contract will be established between the student, teacher, and parent to develop specific behavioral goals with linked incentives. If adequate progress toward the student achievement goals is still not made with intensive, documented Tier III intervention support within two months, the intervention team will refer the student for Special Education testing.

Q118. Describe the extent to which one or more of the founding board members has experience working with special populations (students with disabilities, students with 504 Plans, ELs, students identified as gifted, and students at risk of dropping out). If no founding board members have experience working with special populations, describe



the school's pre-opening plan to prepare for special populations.

Dr. Sharon Castelli and Dr. BethAnn Pratte both hold current North Carolina Exceptional Children Program Administrator licenses.

Dr. Castelli is a Superintendent of a Charter School that currently serves over 200 students with disabilities. Dr. Castelli holds a bachelor in elementary education and served students as a classroom teacher. Additionally, Dr. Castelli has been a principal and a superintendent, serves as the LEA during IEP meetings and is responsible for compliance, and assists the teacher with any questions or services available. Moreover, she is also a parent of a child with special needs that receives OT, PT, speech, and is currently in a self-contained classroom. Through this experience, Dr. Castelli understands first hand both sides of the table when dealing with IEPs and student services. Dr. Castelli supports her teachers when working with families and working through the IEP process. She works with DPI when there are challenges and receives the weekly newsletters with updates in both resources and guidelines. Additionally, Dr. Castelli works with an EC attorney for compliance and complaints.

Dr. Pratte has experience with special education personally and professionally. She has a 20-year-old son diagnosed with Autism Spectrum Disorder, Dyslexia, and a myriad of other learning barriers. She successfully advocates for many students with special needs. She has collaborated with districts to provide administrators and teachers with resources; worked with parents and the Office of Civil Rights, state departments of education/public instruction, and special education attorneys to provide effective interventions for students. She has provided consultation for local and state legislators regarding special education law, effective teaching practices, and early childhood education. Dr. Pratte advocated for parent groups related to violations of civil rights and state and federal statutes. All advocacy work for students with special needs was done pro-bono or through donations because most families cannot afford legal counsel or service providers to help guide them to determine what and how to help their child receive effective interventions. She has experience with diverse learners in the K-12 and higher education public/private sectors, establishing learning environments within a traditional classroom and through remote learning. Expertise and experience with early childhood education in evidence-based literacy instruction; neurocognitive interventions/prevention; developmentally appropriate pedagogy; and advising/mentoring college students.

Q119. Explain how the instructional plan and curriculum will meet the needs of English Learners (EL), including the following:

1. Methods for identifying EL students (and avoiding misidentification).
2. Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for EL students.



3. Plans for monitoring and evaluating the progress and success of EL students, including exiting students from EL services.

4. Means for providing qualified staffing for EL students.

Highlands Charter Academy will administer the Home Language Survey (HLS) before the school year begins and will follow all guidelines set forth by the NC State Board of Education to identify students needing ELL services. Teachers will bring it to the administration's attention if they observe a lack of familiarity with the English language if the survey fails to indicate such. HCA will then use English Language Proficiency in the 21st century (ELP21) Screener Assessment or The W-APT assessment for kindergarteners and the WIDA assessment for students in first grade and above to determine the degree to which ELL services will be required in writing, listening, reading, and speaking.

HCA teachers will use this knowledge to adapt their instructional strategies to support the student's specific literacy needs in the classroom. Teachers will not remove ELL students from the regular classroom because the inclusive classroom atmosphere will benefit the child's literacy growth through peer interaction. Allowing students to remain in the classroom will maximize their ability to use their increasing language skills in all academic areas. It can also help other students by allowing them to build an appreciation for a second language and a culture different from their own.

The Headmaster will work closely with the teacher to decide the kind of classroom support the ELL student will need, and they will monitor the student's progress in English acquisition based on the English Language Proficiency Standards. A support individual proficient in both languages may be necessary to help translate and assist the student in acquiring vocabulary. Assignments may be modified, assessment accommodations made, a tutor utilized for English phonics, or a peer companion to help with spelling and grammar during writing assignments.

If the parent does not speak English, HCA will translate all written communication sent home, and a bilingual staff member or volunteer will always be present during parent/teacher conferences.

Students will take the ELP21 Summative Assessment biannually to monitor and measure progress. Students will only be withdrawn from ELL support once they can participate effectively in class and score a 4 or 5 on the ELP21 Summative Assessment.

The school will seek to employ at least one staff member able to serve as an ELL Coordinator in addition to their teaching responsibilities.

Q120. Explain how the school will identify and meet the needs of gifted students, including the following:

1. Specific research-based instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.



2. Plans for monitoring and evaluating the progress and success of gifted students; and means for providing qualified staffing for gifted students.

Highlands Charter Academy will follow the guidelines for AIG program development according to The NC AIG Program Standards (SBE Policy ACIG-000). The school will utilize the support materials provided by the NC DPI in conjunction with the NC AIG Program Standards. HCA will use the supports provided to develop and update the HCA AIG plan, such as the Professional Development events, virtual monthly meetup sessions, and webinar series to understand the NC AIG Program Standards thoroughly. The HCA AIG Coordinator will review feedback from previously submitted local AIG plans and attend AIG Regional meetings. Highlands Charter Academy will comply with all state laws to identify and meet the needs of its advanced learners. The HCA AIG Coordinator will work to develop an initial AIG plan which will be reviewed annually and updated every three years as required by NC state legislation.

We will identify students starting in the third grade using aptitude test scores, achievement test scores, and teacher recommendations. These measures will provide teachers with a baseline of student learning.

Once students are determined AG, their Differentiated Education Plan (DEP) will be developed. This plan will map out what types of differentiation will be used to ensure they continue showing growth.

The school will consider each child's readiness level, learning styles, and interests to furnish an interesting and challenging learning environment within the classroom. Students will be evaluated for academic strengths and weaknesses. High-performing students who demonstrate mastery of classroom content material will not be removed to an exclusive setting but will be given opportunities to stretch their thinking and satisfy their curiosity. Teachers will provide students with ample reading material on their level and may arrange assignments with peers that can challenge their thinking. In addition, special challenging events may include science fairs and spelling bees.

The classical curriculum allows for the kind of ease in differentiation that teachers need to be able to reinforce or accelerate a student's learning. Teachers can pace students according to their instructional needs by offering accelerated coursework if needed. The HCA AIG Coordinator will support teachers who need additional differentiation for their gifted students.

9.3. Exceptional Children

The public charter school cannot deny admission to any child eligible for special education services as identified under the federal legislation *Individuals with Disabilities Education Improvement Act (IDEA)*, *IDEA regulations*, and *Article 9 115C of the North Carolina General Statutes*, *North Carolina Policies Governing Services for Children with Disabilities*. **All public schools are responsible for hiring licensed and 'highly qualified' special education**



teachers pursuant to law. Public schools are required to provide a full continuum of services to meet the unique needs of ALL students with disabilities.

Q121. Identification and Records Explain how you will identify students who are enrolled within the charter school that have previously been found to be eligible for special education services or are protected under Section 504 of the Rehabilitation Act.

Highlands Charter Academy will ensure teachers receive training and demonstrate knowledge of the Individuals with Disabilities Education Act (IDEA), specifically Child Find regulations (20 USC Chapter 34 CFR 300.309). HCA will require parents/guardians to disclose and provide any previous educational testing, concerns, or issues that may be a barrier to the student's ability to access the curriculum and receive a free and appropriate education (FAPE). Additionally, parents will provide permission for the school enrollment team to contact the previous school to obtain cumulative records. For students who have been previously found to be eligible for special education services, whether eligible for an Individualized Educational Plan (IEP), Gifted Individualized Educational Plan (GIEP), or a 504 Plan, the administrative team will hold a meeting to review records, previous testings, and determine if there is a need for additional testing. If the prior evaluation is over three years old, a re-evaluation will be conducted (IDEA 1414). The existing IEP, GIEP, or 504 Plan will be honored until the IEP Team can construct and implement a new plan.

Q122. Provide the process for identifying students who may be eligible for special education services as identified in the federal 'Child Find' mandate. Be sure to include how student evaluations and assessments will be completed. Include how the school will avoid misidentification of special education students.



Highlands Charter Academy takes seriously its responsibility to identify, locate, and evaluate students who need special education. Looking for and finding these children is an essential first step toward getting them the help they need to thrive in school.

HCS believes that reading is the gateway to wonder and wisdom and that all children can learn to read. Early identification of a learning disability is critical to identify the problem to provide timely and effective interventions. Dyslexia is a common genetic disability, but scientific research shows there are interventions that can rewire the brain so that students can overcome Dyslexia. Teachers will be trained to identify signs of Dyslexia and will understand the impact of this disorder.

Upon enrollment, all Highlands Charter Academy students will be screened for dyslexia, dysgraphia, and dyscalculia as per NC HB 149 (2017). A student with indicators present of one of these conditions will be provided with interventions and monitored through Multi-tiered Systems of Support (MTSS). If a student is suspected of having special needs, the Exceptional Child Team (EC) will gather data and implement MTSS or may move to providing educational testing. The classroom and EC teacher will collaborate and review student responses to intervention weekly to determine the effectiveness of the intervention and level of support. Interventions and levels of support will be adjusted until the student indicates growth in the area of deficit.

After three months, if the student does not make adequate progress in closing the gap, the EC team will convene a meeting, provide the parent/guardian with Procedural Safeguards and request parental permission to provide a multidisciplinary educational evaluation.

A contracted School Psychologist will test the student with systems and procedures aligned with IDEA Section 1414. The child will be evaluated in any suspected area of disability. Likewise, the contracted provider will evaluate speech and Language, Occupational Therapy, or other services. Testing will occur at HCA during the school day.

If the parent/guardian suspects a disability and requests an evaluation, the EC team will provide the parent/guardian a copy of the Procedural Safeguards and follow the legal requirements laid out in IDEA.

Based on the full Educational Report (ER), the misidentification of children with special needs will be avoided by providing teachers rigorous professional development on the manifestations of common disabilities, how to read and interpret data, understanding of special education law, and the use of systems and procedures to record data and track student needs and responses to interventions.

Students will be screened for giftedness. Gifted students will be served by classroom teachers trained in classroom differentiation and provided a rigorous and challenging academic program.

Teachers will be provided professional development on Twice Exceptional (2E) students, in order to ensure the proper identification of all exceptional children. Twice exceptional students are students



who have a superior intellect but also have a learning disabilities that prevents their achievement from being commensurate with one's cognitive score.

Applicant Comments :

"Universal Screeners K-2 Just the Facts" and "Responsiveness to Interventions" articles have been uploaded to support statements made in Q122 response.

Applicant Evidence :

	
Responsiveness to I...	Universal Screening ...

Uploaded on **4/20/2023** by **Karen Manning** Uploaded on **4/20/2023** by **Karen Manning**

Q123. Provide a plan detailing how the records of students with disabilities and 504 Accommodation plans will be properly managed, including the following:

- 1. Requesting Records from previous schools**
- 2. Record Confidentiality (on-site)**
- 3. Record Compliance (on-site)**

Highlands Charter Academy will comply in all respects with the requirements of state and federal law regarding the gathering, maintaining, securing, disclosing, and using of student records. Upon enrollment, Highlands Charter Academy's Headmaster will obtain parental permission to request student records from prior school(s). The Headmaster is responsible for the security of student records, assuring the safety and security of all student records, and providing authorized persons and organizations access to those records at a convenient place and time within limits stipulated by law. Students' cumulative records will be securely housed in the Highlands Charter Academy main office.

Highland Charter Academy will keep all student records mandated by North Carolina State regulations or statutes or authorized by administrative directives and such permitted records as the Board shall approve. Student records will only contain information relevant to the education of the student. The data will be objectively based on the personal observations or knowledge of the originator of the record. All anecdotal information and assessment reports collected on a student shall be dated and signed by the individual who originated the data. Highlands Charter Academy will keep and maintain the records for all students in a confidential manner and will stay in compliance with the Family Educational Rights and Privacy Act (FERPA).

Q124. Exceptional Children's Programming Explain how you will meet the learning



needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible.

Students with disabilities will obtain instruction within the general education setting alongside their peers without disabilities to the maximum extent appropriate at Highlands Charter Academy. In an inclusive setting, students with disabilities will have the benefit of learning to collaborate with peers and be held to high standards with accommodations.

There will be weekly collaborative meetings between the EC-Certified teacher and the classroom teacher to create plans that will make it possible for students with disabilities to access the curriculum and learn commensurate with their abilities. The EC teacher or Aide will push-in into the general education classroom when needed; so as not to exclude the student from the instruction with the teacher and non-disabled peers whenever possible.

Students will not be removed from the general education classroom unless learning cannot be achieved with the use of supplemental aids and services. This decision will be made by the IEP team based on data and documentation. The team will discuss options that are available at the school. Students may receive pull-out services to meet their needs and provide them with FAPE. If the services necessary are not available at the school, Highlands Charter Academy will partner with Moore County Schools or an outside service provider to obtain the appropriate services for the student.

Q125. Describe the specific educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities. How will the school ensure students' access to the general education curriculum?



Highlands Charter Academy will have a student-centered approach for students who have exceptional abilities. HCA will provide guidance and instructional accommodations so that they may learn and develop in ways that facilitate individual academic and personal growth. This includes learning disabled and/or gifted.

HCA is committed to providing students with disabilities access to learning, meeting individual needs and opportunities to thrive, and staying in compliance with IDEA. All Exceptional Children (EC) will make measurable gains and meet their academic goals. The EC teacher, in collaboration with the Individualized Education Program (IEP) team, will construct an individualized plan to allow students to access the general education curriculum through the use of modifications and accommodations. These will vary according to need.

HCA will ensure that classroom teachers use a variety of strategies to allow all students to access the curriculum. Their teachers will be intentional in lesson plans to ensure students with disabilities provide access to a free and appropriate education. Students in general education should learn the same contents and be held to the same standards; however, students with an IEP or 504 Plan will have appropriate accommodations, and the content, process, or product of instruction may be differentiated accordingly. Throughout the delivery of instruction, teachers will ensure that a student's impairment is not preventing them from learning. Teachers will intervene with additional support or different instruction if a student is not making meaningful progress in the classroom or on the IEP goals.

All teachers will understand that students learn in different ways and that various techniques are needed. Differentiated instruction is another way to support students with learning disabilities. Assistive technology tools will be utilized at HCA. Additionally, teachers will use differentiation of content, product, and process to accommodate and meet the student's needs. Teachers will differentiate the mode by which the students learn the information by providing a choice of how the student understands the content: by video, audio, or text. Teachers may also differentiate the process. Lessons that contain complex content would be scaffolded and taught numerous times through multiple forms of representation: providing varying ways the material is presented.

All teachers will be mindful of planning lessons that use visual, auditory, tactile, and kinesthetic tasks. Such variety increases the level of engagement. This way, the student can interact with the content using different neural pathways. Skills and knowledge are also reinforced through repetition.

Another way to differentiate the learning process will be to allow EC students access to an interactive textbook with Universal Design for Learning (UDL). UDL textbooks are more engaging and are read to the student. Teachers may also differentiate the product. They may allow students to use talk-to-text when writing which prevents the physical and often arduous task of writing and will enable them to complete the assignment easier because there is less cognitive load. Graphic



organizers with sentence starters are another way to help students who have problems with focusing and organization because they provide a structure to help them initiate and organize their thoughts.

EC students may be offered options to showcase what they have learned. They may choose different types of tests, a portfolio, a project, or another creative way to show the knowledge and skills they are to master. It is easy to grade differentiated assessments with a criterion checklist: indicating every skill or content knowledge the student is required to demonstrate. Differentiating assessments makes learning fun and exciting. Sharing projects with the class helps to reinforce the content for everyone.

Students with learning disabilities often have issues with Executive Functions (EF). Additionally, Attention-Deficit HyperActivity (ADHD) is a common comorbidity. HCA teachers will be aware of these potential issues and plan accordingly. Strategies and direct instruction will be used to teach students EF and/or focusing problems. Support will also be put in place, and a gradual release model will be utilized. One example is in the following directions. Teachers will cue the student to pay attention before giving instructions to the class. Directions will be clear and provided orally and in writing. Additionally, the teacher will model the task and subsequently check-in with the student to ensure s/he understands the assignment and determine if any clarification is needed. It is helpful to underline or highlight keywords in the directions and number various steps in multiple-step directions.

Students with EF deficits often have difficulty managing time. Long-term assignments should be broken into specific tasks and check-in dates established. This helps keep the student on track and will alert them if there are any genuine issues. Additional or extended time may be warranted because it may take much longer to complete a task due to processing and focusing issues. Many students lose track of time. It is helpful to teach students how to monitor the amount of time they are spending on tasks. Using a timer is an easy ways to keep them aware of time.

Students with EF deficits and LD often are visually overwhelmed. It is helpful to design assignments and assessments with white space and ensure that the questions and text are easy to read. Another needed assessment support is to provide the student with an alternative setting. This will decrease distractions and give them a quiet space to work and ask for assistance when necessary.

Tests can be read aloud and/or students may need a scribe to record answers. Teachers will ensure the test accurately reflects the student's abilities and mastery of the content. Test design should be considered for students with LD. Due to impulsivity, they often rush through a test and may misread questions. Matching is visually overwhelming for students. True and False tests are often written so that one word changes the meaning of the question; therefore, it is not measuring the students knowledge of the content but rather one's test-taking abilities and if one pays attention to details. Multiple-choice tests should have fewer answers. It is better to have fill-in-the-blanks or short



answers with word banks instead of matching or true/false. It is helpful to teach the student good test-taking habits such as reviewing answers, underlining keywords in questions, and eliminating wrong answers. Additionally, the use of Error Analysis (EA) allows students opportunities to reinforce academic content, clear up confusion, and learn test taking skills. Furthermore, EA teaches the student how to review assessments in an effort for one to slow down and prevent errors due to impulsivity. These accommodations do not make the exam easier for the student; rather, they level the playing field by providing sufficient time and support for the student to show what s/he knows.

If a student does not perform well, teachers will provide additional instruction using another method to help the student learn. Grades should reflect a mastery of the content and not behaviors or test-taking abilities that are not content-specific.



Q126. Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).

Consulting, collaborating, and working in teams are necessary to provide eligible students a free and appropriate education. Utilizing these methods will allow professionals to make better decisions and provide proper services to improve learning for students with disabilities.

The Exceptional Child (EC) teachers or aides will be assigned to classroom teachers based on need and will support the students with disabilities. This support can take place in small groups, stations, one:one instruction, parallel, or alternate teaching. These methods will be used to differentiate content to ensure FAPE.

Additionally, Highlands Charter Academy will ensure students with disabilities receive a Free and Appropriate Public Education (FAPE) through the collaboration between members of the IEP team, which consists of the classroom teacher, the EC teacher, the Headmaster, and the parent. Collaborative efforts will vary according to need. The classroom teacher or provider will provide services within the IEP and monitor and record data related to goals within the IEP. This data, along with anecdotes on social, behavioral, and academics, will be provided to the EC teacher. The EC teacher will create progress reports and give them to the parent/guardian. Progress reports will be issued quarterly or more often as dictated by the IEP. The classroom teacher, EC teacher, and Local Educational Agencies (LEA) representative will meet at a minimum of quarterly to review the progress of students. The classroom and EC teacher will collaborate and review student responses to intervention weekly to determine the effectiveness of the intervention and level of support. There will be quarterly opportunities for parent-teacher conferences to discuss student needs and provide evidence of student growth through data, work samples, rubrics, and observations. If data reveal a need to amend the IEP, the EC personnel will communicate the proposal to the IEP team in a written meeting notice. The team will use data to determine any amendments and follow the guidelines within IDEA to ensure FAPE.

Q127. Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents, and relevant staff.



The Exceptional Child (EC) teacher is responsible for the implementation and maintenance of the Individualized Education Program (IEP) and will be the point of contact for scheduling meetings or voicing concerns. Highlands Charter Academy will have systems and procedures to ensure collaboration and effective communication among all members of the IEP team, especially parents. There will be weekly collaborative meetings between the EC teacher and the classroom teacher for the creation of plans that will form a learning opportunity for students with disabilities to access the curriculum and learn commensurate with their abilities. The EC teachers will document all data and collect evidence to track and monitor progress on all goals. Parents/guardians will receive quarterly progress reports, or more often, as per the IEP. There will be a minimum of an annual IEP meeting, but the IEP team will meet as often as needed.

Q128. Describe the proposed plan for providing related services and to have qualified staffing adequate for the anticipated special needs population.

Highlands Charter Academy will have adequate qualified staffing for students with special needs who require related services through contracting with service providers. HCA will ensure that EC personnel are qualified with a college degree in special education or commensurate qualification. All teachers will participate in annual professional development which will include serving special education students.

9.4. Student Performance Standards



Q129. Describe the student performance standards for the school as a whole.

Highlands Charter Academy will have high expectations of students in academics and behavior. The goals are aligned with the HCA mission and will be ambitious and clearly communicated with students and their parents/guardians upon application, at the beginning of each school year, and during conferences. Teachers will provide reports that highlight progress towards goals, areas of strength, and in what areas the student still needs improvement will be provided.

- Highlands Charter Academy will be committed to students achieving at least one year of academic growth per academic year according to the NC Accountability Model.
- For the academic year 2026-27, 65% of students in Grade 3 will score proficient or advanced on math and reading NC EOG, 70% in 2027-2028, and 75% in 2028-2029 and beyond.
- The school will strive to maintain a NC Report Card grade of B or better in each year of existence.

Highlands Charter Academy will accomplish these results by creating a positive learning environment that allows its students to excel. We will challenge students at all levels of learning while maintaining measured growth throughout the school year. HCA's teachers will continuously learn about and implement effective strategies and methods to help their students succeed through top-notch, outstanding professional development programs.

Q130. Explain the use of any evaluation tool or assessment that the proposed charter school will use in addition to any state or federally mandated tests. Describe how this data will be used to drive instruction and improve the curriculum over time for the benefit of students.

Highlands Charter Academy will send annual parental surveys at the end of each academic year. These will include thorough questions about instruction, the curriculum, extracurriculars, etc. Findings will be reviewed by the Headmaster and presented to the Board. Results will help drive improvement plans the following year(s).

Standardized testing will reveal strengths and weaknesses in the curriculum and instruction. HCA teachers will not "teach to the test." The curriculum is strong enough that such will not be necessary.

Teachers will be confidentially surveyed annually on the performance of the Headmaster, which the Board will review, and results will be shared with him/her. If areas of improvement are needed, the Board will set goals and see that modifications are made.

A walkthrough instrument will be created that monitors and drives instruction. Themes or support will be discussed at data meetings. Results can also be used for vertical planning and teacher conversations.

Q131. Explain the policies and standards for promoting students, including students with



special needs, from one grade level to the next. Discuss how and when promotion criteria will be communicated to parents and students.



Promotion criteria will be communicated to parents and students via a Family Handbook. This will be made available online and a print version will be made available upon request. Teachers will also make students aware in class and through private discussions, especially if the student is not performing to ability. Teachers will make sure parents/guardians are well aware of these policies and standards in the many opportunities given to communicate the student's progress (reports, conferences, etc.).

Additionally, in all meetings with families whose students have IEPs, a copy of NC Parents Rights and Responsibilities in Special Education (Procedural Safeguards) will be provided, outlining all resources for families with children with special needs.

PROMOTION AND RETENTION

In support of student success, Highlands Charter Academy recognizes that the progression of students from one grade level to the next should be continuous and that students have a right to on-grade-level instruction. The decision to promote or retain a student shall be made using a variety of assessments of a student's mastery of academic standards and readiness for the next grade including state-approved assessments. Retention should be used only after students have been supported through early diagnosis and intervention, the Multi-tiered Systems of Support (MTSS) process, and the Student Support Team (SST). If students are thought to be exceptional, HCA will administer a multidisciplinary evaluation to determine if there is an underlying disability which may be the cause of the academic struggles.

Exceptional Children will have an Individualized Educational Plan (IEP) or 504 Plan. The IEP will ensure a Free and Appropriate Education, meaning a student is able to access the curriculum and be proficient with skills and knowledge within the grade-level standards. If an Exceptional Child is in danger of failing at the midterm, the IEP team will meet to determine the root cause and (as needed) may make appropriate amendments to the IEP and related services.

ELEMENTARY SCHOOL PROMOTION CRITERIA

Literacy:

Since language is the basis of all human interaction, a person cannot thrive independently in the world with limited language skills or weak literacy. The school will follow the criteria of reading competency set forth in our explicit phonics program. The ability to read, particularly in the early elementary grades, will therefore be a requirement for promotion, because, without the foundational ability to read well, a student cannot begin to advance in English, history, mathematics, the sciences, or the arts.

Kindergarten:



- The student must be recommended for promotion by the classroom teacher and Principal based on satisfactory classroom performance.
- The classroom teacher and additional reading support personnel will make recommendations for placement based on student progress in the explicit phonics curriculum.
- The teacher will also make placement recommendations based on the student's behavior and maturity level as observed in the classroom setting.

Grades 1-2:

- The student must perform at or above grade level in English and Language Arts and mathematics on the student report card.
- Grade level performance is determined by mastery of academic skills as measured by classroom and standardized assessments.
- The student must be recommended for promotion by the classroom teacher and Principal based on satisfactory classroom performance.
- The classroom teacher and additional reading support personnel will make recommendations for placement based on student progress in the explicit phonics curriculum.

Grades 3-5:

- The student must perform at or above grade level in English and Language Arts and mathematics on the student report card.
- The student must be recommended for promotion by the classroom teacher and Principal based on satisfactory classroom performance.
- Grade level performance is determined by mastery of academic skills as measured by classroom and standardized assessments.
- Third, fourth, and fifth grade students may not be promoted to the next grade if the student does not achieve grade level on the state-adopted assessments in reading and mathematics and meet promotion standards and criteria established by the local board of education.

Grade 6:

- The student must perform at or above grade level in reading, language arts and mathematics on the student report card.
- The student must be recommended for promotion by the classroom teacher and Principal based on satisfactory classroom performance.

The initial charter will carry the school through 6th grade, 2029-30.

SPECIAL NEEDS STUDENT PROMOTION CRITERIA

Per DPI guidelines, HCA will follow the mandated graduation requirements for students with disabilities. For students following the Occupations Course of Study, HCA will adapt course requirements and the same credit requirements as Future-Ready Course of Study.



Q132. Provide the public charter school's exit standards for graduating ALL students. These standards should set forth what students in the last grade served will know and be able to do. Be sure to include plans for students at risk of dropping out.

The last grade to be served in this five-year application will be Grade Six in the academic year 2029/30.

The ninth grade will begin at Highlands Charter Academy in 2032 and by adding a grade in subsequent years, HCA will have all high school grades in 2035 with its first graduating class in 2036. Graduation standards and drop-out prevention measures will be addressed more fully in our following charter application.

All students must pass the End of Course standardized assessments, have earned 24 credits (see Q109), and have a cumulative GPA of 2.0 or higher on a 4.0 scale in order to graduate. Appendix B, pages 10-12 contains the overview of grades 9-12 as they stand now.

A certificate will be awarded to students in a special education program based on the completion of their Individualized Education Program (IEP). This educational plan will be communicated to the family during all transitional meetings.

Given all that we have said above concerning curriculum, school climate, and parental communication, we would hope that students would be unlikely to consider dropping out. We would hope that by the upper grades they would have taken on board the values and behaviors taught at all grade levels, and that these would strengthen them in adversity. We would also hope that students would be secure in the knowledge that the school, the faculty, and the staff would all be vested in their success so that it would be possible to turn to school personnel for help if pressures are causing loss of hope of success. From the school side, we can be sure that uncharacteristically poor academic performance or social behaviour will be noticed and acted upon. Teachers, and administration if necessary, will reach out to the student first and then to parents to put in place a plan to ensure retention and eventual graduation. As noted in Q112 and Q117, MTSS will be in place.

9.5. School Culture and Discipline

Q133. Describe the culture or ethos of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social development.



Highlands Charter Academy will aim to prepare students for life, not just for academic success, acceptance into a good college, and a fulfilling career, but the formation of the will to desire what is good, true, and beautiful. Following our commitment to the classical tradition, we follow the saying of the Greek Philosopher, Plato, who wrote that, “Education is teaching our children to desire the right things.” We will strive to equip our students with the tools to be self-disciplined and intellectually competent, with strong moral character and civic responsibility. In other words, our teachers will not only instruct but also inspire and develop our students focusing on developing the whole person—heart, mind, body, and soul.

Highlands Charter Academy will provide for human flourishing. We want our students will have a sense of purpose: they will understand what life is about because they will have a sense of belonging in society and in history. They will develop a sense of personal worth and understand their capacity for contribution to the greater society to which we all belong. The mystery and awe of connection with something greater than themselves, a sense of transcendence, will be developed in HCA students so that students will be inspired to do good. At HCA, we will do all we can to enable students form the resolve to adhere to what is good and right.

The time-tested classical model of education that HCA will utilize will accomplish these aims through a curriculum that underscores the whole history with its triumphs and losses, the intermingling cultures, and the literary works, that shaped our society and formed our understanding of what it is to live a meaningful life.

Highlands Charter Academy will require students to wear uniforms. By doing so, a positive school culture will be created. Uniforms often encourage students to present their school positively, encouraging a sense of pride, discipline, and identity. There will be a sense of equality and belongingness, and distractions and peer pressure will be reduced. Because our uniforms will be sharp, our students will have a sense of professionalism, neatness, and cleanliness. For most families, the time, stress, and financial burden associated with clothing purchases will be reduced. Security and safety will be enhanced as the identification of our students will be more apparent. Uniforms also make dress code enforcement easier, reducing disagreements over violations.

Q134. Explain how you will create and implement this culture for students, teachers, administrators, and parents starting from the first day of school. Describe the plan for acculturating students who enter the school mid-year.



STUDENTS

It is said that good manners and acceptable decorum are caught, not taught. HCA teachers, administrators, and staff will model the ethos of HCA in how they treat students.

Students will be treated with respect and kindness each and every day. HCA teachers will take the time to get to know their students individually and show genuine curiosity about their interests, hobbies, and experiences. Positive relationships with students will be built by showing empathy, understanding, and respect. Teachers will foster a classroom environment where students feel valued, respected, and included, regardless of their background or abilities.

Clear lines of communication will be established with students and their families from day one. Teachers will be explicit concerning their expectations and class policies for behavior, participation, and academic performance. They will encourage students to contribute to creating a positive classroom culture by discussing and agreeing on class rules and norms, in an environment of open communication, responsive to questions and concerns.

The classroom environment will be inviting, clean, organized, and visually appealing. Classrooms will contain posters and images stating virtues and values in engaging visuals.

Our rationale for uniforms in Q133 will also contribute to the creation and implementation of the culture.

Books read by HCA students will not be chosen randomly. They will be carefully selected instruments that properly shape our students' moral imaginations. The literature read and studied across the subjects will reinforce positive behavior, values, and morals. Students' books, whether time-tested literature, biographies of great scientists or athletic figures, or historical reading, will provide compelling narratives of significant events and meaningful lives. Access to such books is designed to shape our students' imaginations as they learn to feel, wonder, and experience joy that can help them live their lives well.

TEACHERS & ADMINISTRATORS

The administrators and teachers will be well aware of the culture to be developed at the school, expectations of virtues, ethical values, and moral character. The Board will hold the Administrator and Teachers accountable for upholding those expectations.

PARENTS

The administration and teachers will appraise parents of all expectations upon applying, during Orientation, through newsletters, in contact with teachers, and in the multitude of other ways they are in association with the school.



ACCULTURATING STUDENTS WHO ENTER AFTER THE SCHOOL YEAR HAS STARTED

New students may be admitted during the first 20 days of school if the class student maximum limit has not been met. If the class is full and a student leaves within that 20 day period, parents/guardians will be contacted according to their position on the waitlist. In those first days, any new arrivals and their parents/guardians will clearly be informed by the Headmaster and teachers of the school's culture in the ways mentioned above.

After the 20-day point, the seat will not be filled if a student leaves.

Q135. Provide a brief narrative that delineates how student conduct will be governed at the proposed charter school and how this plan aligns with the overall mission and proposed Education Plan of the charter school. Be sure to include:

- 1. Practices the school will use to promote effective discipline.**
- 2. A preliminary list and definitions of the offenses which may result in suspension or expulsion of students.**
- 3. An explanation of how the school will take into account the rights of students with disabilities in regard to these actions that may or must lead to suspension and expulsion.**
- 4. Policies and procedures disseminating due process rights, including grievance procedures, for when a student is suspended or expelled.**



For HCA students to be able to seek truth in order to discover what is good and beautiful in life, exemplary behavior at school will be paramount

Practices HCA will use to promote effective discipline.

A positive learning environment that supports student success will be paramount at Highlands Charter Academy. Then, in order to maintain that positive learning environment, effective discipline is essential. To promote effective discipline, we will develop a clear and consistent discipline policy to ensure that everyone understands the school's expectations for behavior and the consequences for violating those expectations. Teachers will quickly reward good behavior with praise, small rewards, and certificates. Positive relationships will be built with students leading them to behave appropriately because our students will be made to feel cared for by their teachers and the school staff. To help prevent minor problems from escalating into larger ones, teachers will address discipline issues promptly and consistently. Self-discipline will be encouraged. Teachers will familiarize students with problem-solving skills, conflict-resolution strategies, and self-regulation techniques. For children with behavioral challenges, HCA will work with these students to develop individualized plans that address specific needs.

A preliminary list and definitions of the offenses which may result in suspension or expulsion of students.

Preliminary examples of offenses that may result in suspension or expulsion of students include:

- Physical violence (hitting, kicking, or physically hurting another student or staff member)
- Verbal or written threats (threats to harm others, including staff or fellow students)
- Possession of weapons (bringing a weapon such as a gun or harmful knife onto school grounds)
- Drugs and alcohol (possession or use of illicit drugs or alcohol on school property)
- Theft (stealing from another student, staff member, or the school itself)
- Sexual harassment or assault (any unwanted physical contact, sexual comments or gestures, or any behavior that is inappropriate or unwanted)
- Vandalism (deliberately damaging school property)

An explanation of how the school will take into account the rights of students with disabilities in regard to these actions that may or must lead to suspension and expulsion.

If a student's behavior is related to their disability, disciplinary actions will take into account the disability, and the student will not be punished for conduct that is beyond their control. If attempts to address problematic behavior have not been successful, and the behavior is interfering with learning, a Functional Behavioral Assessment (FBA) may be necessary to determine why a student is displaying problematic behavior and to help guide effective, positive interventions. An IEP or 504 plan may be put into place to ensure that the student receives appropriate accommodations and support to address their disability-related needs. Teachers and administrators will use positive



behavior interventions and supports (PBIS) to reduce problematic behavior. HCA will follow due process requirements before suspending or expelling any student, which includes providing notice and an opportunity for the student to present their case.

Policies and procedures disseminating due process rights, including grievance procedures, for when a student is suspended or expelled.

Policies and procedures for disseminating due process rights for student disciplinary issues at HCA will be clearly outlined and communicated to all students, parents/guardians, and staff members in the Student/Parent Handbook and at Orientation each year. It will also be available on the school's website. By communicating these rights and providing a fair and transparent process, HCA will ensure that all students are treated fairly and that their rights are protected.

HCA will notify students and their parents/guardians of any disciplinary action that may be taken against the student. Notification will include the nature of the violation, the possible outcomes, and the right to a hearing.

An impartial decision-maker will conduct this hearing, and the student will be allowed to present their case and evidence. Students will have the right to be represented by an advocate or attorney at the hearing. If the student disagrees with the decision made at the hearing, they have the right to appeal it. The appeals process will be clearly outlined and communicated to the student and their parents/guardians. The Headmaster will establish a timeline for the disciplinary process, including the notice, hearing, and appeals process. HCA will maintain detailed records of all disciplinary actions taken against students, including any hearings and appeals. HCA will keep the records confidential and only share on a need-to-know basis.

9.6. Certify

Q136. **This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.**

- Yes
- No

Q137. **Explanation (optional):**





10. Governance and Capacity

10.1. School Governing Body

Q138. **Organization Street Address (if you have one)**

- **On the Organization Information page, you already provided the mailing address.**

The school has a Post Office box since we have not yet secured a facility. That address is: Highlands Charter Academy, PO Box 175, Carthage, NC 28327


10.2. Governance

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


Q139. **Using the attached resource as a template, please complete the table depicting the initial members of the nonprofit organization.**

Upload Required File Type: excel Max File Size: 30 Total Files Count: 3

Resources


Initial Members of t...

Applicant Evidence :


Initial Members of t...

Uploaded on **4/24/2023**
by **Karen Manning**

Q140. **Describe the governance structure of the proposed charter school, including the governing board's functions, primary duties, roles, and responsibilities as it relates to**



overseeing the charter school. Include how the board will recruit, hire, and supervise the lead administrator.



Highland Charter Academy's Founding Board is a team with compatible skills and backgrounds who share a shared belief in the HCA mission and vision. All Board decisions serve to achieve this mission and vision.

The Board will function as a governing body, setting the long-term goals for HCA. There will be at least five and, at most, eleven members. The officer positions will be those of a Chair, a Vice Chair, a Secretary, and a Treasurer. The remaining members will be at-large voting positions. Board membership will be balanced with the essential skills, experience, and diversity to make sound, practical decisions to steer the organization toward its goals.

While the Board will act as the school's governing body, it will provide the Headmaster the autonomy to manage all day-to-day operations and execute programs that will drive success toward the mission. The Board will support the Headmaster by ensuring compliance with all policies, examining and assessing strategic plans and gains toward measurable goals, and reviewing and supporting all hiring and firing decisions, financial reports, and business transactions.

The HCA Board will assist the Headmaster in developing academic goals based on the mission and vision. They will generate additional goals to gauge the school's mission accomplishment. These will include student and teacher retention, student attendance, academic achievement, and parent/guardian participation and satisfaction. Each month at the Board meetings, the Headmaster will report on progress toward goals.

The relationship between the Board Chair, the Board, and the Headmaster will be built up by a common desire to adhere to the school's mission, accomplish goals, and progress toward the school's vision. Such will take intentional action and trust between all parties, which is critical to the organization's long-term success.

The Board will be responsible for fundraising efforts, marketing, securing a permanent facility, maintaining community partnerships, ensuring adequate resources, ensuring that the school remains in compliance with statutory and regulatory requirements remaining faithful to the terms of the charter and bylaws, conducting meetings, posting meeting agendas and minutes to the website, approving policies, approving any amendments to the bylaws, managing the grievance policy ensuring grievances receive prompt attention, and providing fiscal accountability and solvency.

How the Board will recruit, hire, and supervise the lead administrator.

One of the most critical tasks will be to recruit, hire, oversee, and evaluate the Headmaster. The Board will establish a search committee which will be made up of Board members and community representatives that will create a job description for the Headmaster. Through professional networks, relationships in the community and beyond, and extensive advertising, the Board will recruit a Headmaster that holds to the mission, vision, and values of HCA.



The general characteristics of the HCA Headmaster will be:

- A person of a high moral character whose leadership will generate trust and hold the confidence of others with unwavering personal integrity, honesty, decisiveness, and empathy.
- The ability to discern the ends that fulfill the nature and purpose of classical learning and to chart a course to reach those ends.
- The ability to instruct and inspire people to follow, to commit, to take responsibility, and to perform together effectively.
- The ability to raise self-governing leaders within the school.
- Demonstrates a love of learning through the ongoing personal pursuit of knowledge for its own sake and the desire to share that knowledge with others.
- Well-organized, able to delegate with clear direction, and ready to assume responsibility for everything that happens under their charge.

Preference will be given to candidates who have experience in implementing the Classical Education model and recruiting and developing effective teachers and staff.

Before making a final decision, the Board will spend a good deal of time with the candidates in various settings and with diverse individuals to ensure the leader is a good fit not only for the school but for the community. Because the Headmaster will be the "face of the school," he/she should be comfortable with many groups in various settings.

Supervision of the Headmaster by the Board will hinge upon consistent communication, timely and accurate reporting, and a professional, convivial relationship. Specific measurables will be agreed upon, and the Headmaster will report to the Board at each Board meeting.

Q141. Describe the size, current and desired composition, powers, and duties of the governing board.



The HCA Board currently consists of eight members with rich and diverse backgrounds. No single board member or committee has more power than another. Each board member has one vote. The Board follows Robert's Rules of Order for orderly meetings that accomplish goals fairly.

The Board will aim to maintain seven to 11 members. Named positions are Chair, Vice Chair, Treasurer, and Secretary. Each director shall serve a three-year term. In the event of a vacancy, a replacement director will serve the remaining term of the director being replaced, and this will not be counted as his initial term. One-third of the number of initial (Founding) Directors shall serve a term of one year, one-third shall serve a term of two years, and one-third shall serve a term of three years so that the term of future directors will be staggered.

Some of the Board's primary duties will be to respond to critical issues as they arise and develop strategic goals and long-range financial plans. Other duties of the Board were covered in Q140.

Because a balance of diverse skills can lead to the actualization of the mission, the Board will always seek to represent a wide array of backgrounds, viewpoints, networks, and talents in areas such as finance, education, administration, fundraising, and public relations.

The Board will create committees that will be crucial to success. These committees will carry out the Board's proposals, research, or needs. Some committees will be ongoing, and others will be developed for short-term projects. Board members will also participate in or be the head of at least one committee. The committees will meet at least once between each board meeting.

These committees will include but are not limited to Finance, Development/Governance, Facilities, and Marketing/Community Engagement.

Q142. Describe the founding board's individual and collective qualifications for implementing the school design successfully, including capacity in such areas as school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent/community engagement.



With a balance of business, education, leadership, technology, school administration, marketing, finance, data management, and management expertise, the current board members have complementary skills and perspectives that guarantee our ability to implement the mission and vision of Highlands Charter Academy successfully.

Dr. Sharon Castelli

Air Force Veteran Dr. Sharon Castelli has vast experience in school leadership, administration, and governance experience as well as curriculum, instruction, and assessment; performance management; and parent/community engagement. She has served as Superintendent of Schools for an estimated 1,900 children in grades K-12 and over 220 staff since 2020. A condensed resume accompanies this application, and a complete resume can be accessed at: <https://bit.ly/3LnYLZe>

In addition to her school administration experience, Castelli has extensive background and knowledge of facility acquisition and management. She has been a superintendent during the construction of new facilities in addition to leasing buildings, used modular units, and obtaining new modular units. Additionally, she has experience working with Town Managers and obtaining general contractors with the responsibility of conducting physical needs assessments on commercial properties to evaluate the appraisal value and determine costs to upfit the property. During her tenure, Castelli has been involved in acquiring a 45-million dollar bond for the construction of a new High School and Career Academy for an NC charter school. While in a rented facility, she worked with general contractors to expand classrooms to allow for growth while new construction was underway.

Deborah Lawson

Board Member Deborah Lawson is a Licensed Real Estate Agent. She has represented buyers and sellers for lots, acreage, single-family homes, horse farms, and commercial properties. Lawson will be instrumental as we search for a facility to begin HCA and as we seek land to build or a larger structure to renovate as we grow to 12th grade. Having been a Director of Institutional Advancement at a private school in Moore County, raising over \$6 Million, she has experiences that will benefit HCA in fundraising. Her experiences as a private school Office Manager, Admissions Director, and Director of Marketing will also benefit the school. Her resume accompanies this application.

Dr. BethAnn Pratte

School leadership, administration, governance, curriculum, instruction, and assessment experiences are held by Dr. BethAnn Pratte. She has served as a classroom teacher, educational leader, college professor, special education advocate, and dyslexia interventionist. She holds a Superintendent, Curriculum Instructional Specialist, Principal and an Exceptional Children Program Administrator license and Pennsylvania Instructional II Elementary Education K-8 Certificate. An abbreviated



resume accompanies this application, and her complete resume can be accessed at <https://bit.ly/43SoUXx>.

Caroline Kelly

Caroline Kelly has many years of teaching experience, has served as a curriculum specialist, and worked with the NCDPI on various World Language related projects. Her knowledge of Latin is an asset for the development of a Classical School. She has publication and editorial experience, has worked as an educational consultant, and has held leadership positions in several regional and national professional associations. An abbreviated resume accompanies this application, and her full resume can be accessed at <https://bit.ly/41SWXx5>.

Caleb Criscoe

Caleb Criscoe, an Air Force veteran, is a Moore County Native and is very connected to the Robbins community. It was essential to the Board to have a person from that area since it's a location we wish to target because the schools are the lowest performing in the county. Criscoe is an experienced cybersecurity professional with nearly two decades of leadership and technical expertise in implementing successful information security programs. He will prove helpful to HCA for secure record retention and technology needs. Refer to his resume for further information on his education, work experiences, and skills.

Karen Manning

Karen Manning has worked in advertising for over 40 years and has been the Director of Marketing and Public Relations at Sandhills Community College for the past 17 years. She is a Moore County native. Her connections to the community and marketing expertise have already been invaluable in the initial outreach for HCA and will continue to be central to the building up and outreach of the school community.

Becky Graham

Becky Graham recently retired from Sandhills Community College as a Data Management Analyst, where she compiled and analyzed data for internal use and federal reports. She brings valuable experience also from her years with Burlington Industries, where she planned building and product layout to use available space efficiently and worked with contractors when doing an addition to the distribution center. Graham also served on the Board of School Trustees for Chester County, SC Schools.

Ariane Mestelle

Ariane Mestelle's professional experiences in sales and finance will prove invaluable to HCA. She has developed and implemented strategic marketing and sales plans and forecasts and provided



analytics, budgeting, compensation plans, and reporting for sales. She has presented to investors and potential strategic customers as a Business Development/Financial Controller. Mestelle has been responsible for all accounting activities of a firm as a Controller. She has coordinated all aspects of budgeting and forecasting, operational expense analysis and maintenance, financial closing, and reporting. Her complete list of experiences can be found on her resume that accompanies this application.

Q143. Explain how this governance structure and composition will help ensure that

- 1. The school will be an educational and operational success;**
- 2. The board will evaluate the success of the school and school leader; and**
- 3. There will be active and effective representation of key stakeholders, including parents.**



Educational and operational success

HCA will excel academically and operationally. Having three educators on the HCA Board demonstrates the school is dedicated to academic integrity and implementation of the education model. Business leaders and those with staff experiences at the local community college on the Board will ensure the school will develop clear, ambitious, measurable short and long-term goals with related strategic plans and benchmarks. They will see to the fiscal oversight and analysis to guarantee the school is financially fit. Having an experienced Director of Institutional Advancement will significantly benefit HCA in the area of fundraising. The entire team has valuable community connections, which will attract support on many levels.

Success of HCA and Headmaster evaluation

The Board will evaluate the success of the school and Headmaster by meeting agreed-upon measurable goals related to academic performance, operations, teacher satisfaction, fiscal conditions, and school climate and culture. The Headmaster will be supervised through monthly board meetings, evaluations, and analysis of reports. The Headmaster will be the only employee directly overseen and evaluated by the Board. Together, the Board Chair and the Headmaster will establish monthly agendas for Board meetings. The Treasurer and Headmaster will develop and monitor HCA finances.

Representation of key stakeholders and parents

There is on the Board, and will continue to be, an active and effective representation of key stakeholders, including parents, due to the diversity of backgrounds, skills and experiences. There will be a comparable balance of representatives on future Boards.

An HCA parent organization will be instituted, allowing parents to develop and participate in many activities and functions. A School Advisory Committee will be organized and led by the Headmaster. Parents may also be invited to participate in other committees established by the Headmaster and Board.

Community members will be invited to become involved in HCA. Individuals will be asked to serve on committees or become involved in events. There will be open houses with tours to increase support and funding, generate interest among prospective students, and will serve to develop and maintain business partnerships. As expanded upon in answer to another application question, community members will be invited to share talents with the school and students (art exhibits and artist talks, presentations, etc).

Q144. Explain the procedure by which the founding board members have been recruited and selected. If a position is vacant, how and on what timeline will new members be



recruited and added to the board?

Most Founding Board members have long been intrigued by the successes of the classical education model. Plus, many were concerned about the plummeting performance scores of northern Moore County schools and the overcrowding at others. As if by providence, in different circles, members began discussing the idea of a content-rich classical school for northern Moore County that would be available to all, not just families who could afford private school tuition. Paths crossed numerous times, and serious discussions began about how to make such a school happen. The current Board came together formally and began regular meetings. Once it was determined a charter school was preferred, the team began work to plan the school and apply for the charter. All eight individuals are positive and dedicated, and offer a wealth of experiences and skills needed for such a project.

Board recruitment will be ongoing. We are currently seeking a Hispanic member since we strongly desire to promote to and obtain students from the Hispanic community and offer a promising future to their children.

All Founding Board members have proven their commitment to the vision through attendance at physical and Zoom meetings, swift replies to emails and text messages, completion of research tasks, distribution of promotional materials, sharing the mission with their circles of influence, and participation in work-sessions

To ensure consistency through the HCA planning phase, Founding Board members have committed to serving up to a three year term with the opportunity for reappointment. According to our bylaws, directors may serve up to two consecutive three-year terms. Directors may be elected to another term in the event that it seems to be in the best interests of the School to do so.

We will identify the expertise needed for prospective members to maintain an effective and complementary Board composition.

Committees will be formed as needed and will include both Board members and non-Board members. If these non-Board members are competent and share the vision of HCA, they may be asked to apply for inclusion on the Board (an application will be developed).

Ideally, Board membership will be between seven and 11 members, and the Board will attempt to fill open seats within three months of a vacancy.

Q145. Describe the group's ties to and/or knowledge of the target community.



Karen Manning

Karen Manning is a Moore County native. She has strong ties to the community through her many interests, community involvement, work connections from the local community college, and church committees and ministries. Her job as Director of Marketing at Sandhills Community College for the past 17 years has given her a confident knowledge of the community.

Dr. Sharon Castelli

Dr. Sharon Castelli has lived in Moore County since 2005. She was an elementary teacher and assistant principal in Aberdeen Primary, Aberdeen Elementary, and West Pine Elementary. Her older children graduated from Pinecrest and her youngest child, Sarah, attended West Pine Elementary and West Pine Middle until 2022.

Caroline Kelly

Caroline Kelly is married to a descendant of early Moore County families. Her husband spent the summers in the Eureka community as a child and, once married, brought Caroline to many family events in the county - so she got to know and love the area well. When an old "Kelly House" came on the market in 2012, they were excited to retire to the Carthage area after she had enjoyed a long career in education.

Caleb Criscoe

Caleb Criscoe is a lifelong resident of Moore County, North Carolina. He has a deep love for his hometown of Robbins, where his family has resided for generations. Caleb's roots in Robbins run deep, with his family having lived in the area for hundreds of years, and he is a direct descendant of the renowned gunsmith and town founder, Alexander Kennedy. He and his family are currently building their new home next to where he grew up on the banks of Bear Creek in Robbins. In addition to his military service, Caleb has also devoted himself to his community and his faith. He has been ordained as a deacon in the Baptist church, is actively involved in his local community, and is committed to making a positive impact on the world around him.

Rebecca Graham

Rebecca Graham moved to Moore County in 2007 when she began teaching GED classes for Sandhills Community College. She recently retired from the college and upon doing so began serving on the HCA Board. She has been very involved in her community through work, family and religious activities.

Deborah Lawson

Deborah Lawson has been a resident of Moore County for 25 years. She is very involved with the



church she attends and has been involved in the local community for many years. She has helped with the Charter of the Junior League of Moore County, sat on the BOD of Southern Pines Business Association, The Bethany House, the Sandhills Children's Center, Leadership and Finance Councils for St. John Paul II, and currently on the SIT School Improvement Team for Pinecrest High School. She worked as a Real Estate Broker from 1990-2010 and has recently returned to this most enjoyable career.

Ariane Mestelle

Ariane Mestelle moved to Moore County in 2016. She has two children, ages seven and four. Her ties in the community for our target age group for students are extensive. She owned a wellness studio for two years upon moving here and made all types of contacts in this community. She belongs to multiple mom's groups. Ariane and her children belonged to a homeschool community for three years and she tutored there one year before sending her children to schools in the Moore County community. Her children are actively involved in multiple churches, farmlife, basketball, soccer, softball, tennis, gymnastics and she frequents all types of community events for her children's enjoyment as well as playgrounds in the Moore County area.

Dr. BethAnn Pratte

Dr. BethAnn Pratte moved to Moore County in 2018. She is very involved in advocating for educational reform. She helps parents navigate through the system to ensure students with special needs receive a Free and Appropriate Education (FAPE). She is active in bringing awareness of Dyslexia and helps educators understand how to identify and provide effective interventions for language disabilities. She helped with the campaigns of current school board members and county commissioners. She regularly attends MCS Board Meetings, leads the Citizen Action Support Team, and is helping young adults start a TurningPointUSA Faith Hub. Previously, she served on the national board of FCA Golf. Currently, she volunteers with FCA Golf at the TobyMac camp at Pine Needles Golf Resort and helped start the Bonnie McGowan Girl's Golf Scholarship for the camp. These activities allows her to interact with many elected officials and local leaders.

Q146. Outline the strategic board calendar detailing how often the board will meet according to the bylaws established.



The Board will meet monthly. Currently, the third Monday of each month is the set day, and if urgent matters need to be discussed, a Zoom meeting will be scheduled.

Once a year, month yet to be determined, a Board Retreat will be scheduled where the Board will consider advancement toward annual goals, examine current policies and procedures, and complete a self-assessment to measure the Board's performance against the standards outlined in the Charter School Center's Standards for Effective Charter School Governance (charterschoolcenter.ed.gov).

Committee work sessions and communications will be held intermittently between Board meetings.

The Board will develop a strategic outcomes-based calendar to allow for oversight and analysis of the organization. They will use the calendar to identify critical benchmarks, financial analysis, and organizational health reviews.

Q147. What kinds of orientation or training will new board members receive, and what kinds of ongoing professional development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation.



Orientation or training for Board members

HCA Board members will attend all Planning Year sessions offered by NCDPI. Members will attend the NCDPI New Charter Schools Leaders Institute to hear from the experts at DPI, the Center for Safer Schools, and local charter schools. The HCA Board realizes that these sessions will be instrumental in helping us implement all the work required to meet this incredible obligation.

Board members must visit and tour a classical charter school with a similar mission and vision.

Ongoing professional development for existing board members

In subsequent years, HCA Board members may continue to attend the Institute to further their learning as it pertains to NC charter schools.

We will seek out informational charter school sessions that will benefit the members, whether in person or online.

We may provide training by contracted charter school affiliates.

Training and development timetable

The HCA Board foresees some committee members becoming full-fledged Board members as they work with the school and the Board. They will catch the vision, know the goals, and see firsthand the practices that make HCA an outstanding school. They will have perfect opportunities to experience the school's operation and encounter the Board, Headmaster, and teachers carrying out the mission.

There will be an annual Board Retreat where we will host guest speakers, leaders, and professionals from other charter schools and the office of NCDPI Charter Schools. There will be additional training for new Board members on governance, finance, and other topics.

A Board of Directors Manual will be created that will give new Board members a complete picture of the school and board policies.

There will be a required Orientation Session for new Board members.

Each new board member will be assigned a current Board member as a mentor who will be their first point of contact to answer questions or navigate issues.

Training and development topics

Training and development topics will include but are not limited to:

- Board Roles & Responsibilities
- Governance



- Finance
- Legal Compliance
- Classical Education
- Strategic Planning
- Non-Profit Practices
- Personal Education
- Open Meeting Laws
- Public Records
- Bylaw Compliance

Training and development participation requirement

Current and new Board members will be required to attend all scheduled training sessions and the Board Retreat. Members will be required to participate in at least two additional professional development opportunities each year and report findings at a monthly meeting.

Q148. Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Identify any existing relationships that could pose actual or perceived conflicts if the application is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts.



Board Members will confirm annually through a Conflict of Interest signature form that they have no inappropriate conflicts that would preclude them from faithfully serving Highlands Charter Academy with fidelity.

Ethical standards

The Board of HCA is expected to have the highest ethical standards. The same ethics we will expect of our Headmaster, teachers, and staff are to be held by the Board. Qualities of honesty, integrity, respect, fairness, compassion, responsibility, and compassion, to name a few.

Procedures for identifying and addressing conflicts of interest

If a perceived conflict of interest has been suspected or disclosed, it is that Board members responsibility to bring awareness to the entire Board, and the Board will determine if a conflict actually exists. The Minutes of the meeting will reflect all suspected conflicts of interest disclosures.

If a board member neglects to disclose an interest in a matter, the Board will provide the member an opportunity to explain the alleged failure to disclose. A neutral person or committee may be called in to investigate and determine if the infraction should be cause for removal from the Board.

If an actual conflict does exist, the Board will decide whether the transaction or other conflicting involvement may be authorized as just, fair, and reasonable as it relates to HCA.

The person in question will be allowed to make a defense and leave the room for the Board to discuss the matter.

If necessary, the Board Chair will appoint a neutral person or committee to investigate alternatives. If the Board determines a more advantageous transaction is not possible, the Board (excluding the person in question) will decide by a vote whether the issue is in the best interest of HCA.

Existing relationships that could pose actual or perceived conflicts

We do not see that any current Board member or a family member has any existing relationship that can pose actual or perceived conflicts.

Specific steps that the Board will take to avoid and mitigate conflicts

Board members will be well informed in their Orientation of issues that can be perceived as conflicts of interest. All Board members will adhere to a comprehensive Conflict of Interest policy. It will list all areas that can be construed as conflicts and required conduct as a Board member.

Q149. **Explain the decision-making processes the board will use to develop school policies.**



The Board will direct, control, and inspire the school by carefully establishing broad written policies reflecting the Board's values and perspectives. They will develop policies supporting HCA's mission, vision, and academic goals and follow all NC State Laws for Charter Schools. The Board's primary policy focus will be on the intended long-term impacts on students' lives rather than on the administrative or programmatic means of attaining those effects inside the school.

The Board will cultivate a sense of group responsibility and will be responsible for excellence in governing. They will be the policy initiator, not merely a reactor to staff initiatives or stakeholder requests. The Board will not use the expertise of individual members to substitute for the judgment of the Board. However, the expertise of individual members may be used to enhance the understanding of the Board as a body.

HCA policies will align with the HCA mission and vision and be value-oriented, legal, and protective of constitutional rights. The Board will oversee the development of policies related to academics, enrollment, student admissions, handbooks, communications, board governance, finance, school operations, building requirements, teacher licensure, charter renewal, employee and relevant Board member screening, and other areas. Policies will be communicated to all stakeholders and written within the scope of the Board's authority.

The Board of Directors will operate as the governing body, and the daily operational decision-making will be the responsibility of the Headmaster.

The Board will, at each Annual Retreat, discuss issues that parents, teachers, the Headmaster, or stakeholders have presented throughout the year and determine if any policy needs revision or a new policy developed.

If there is a need for a new or amended policy, whether the need arises during the course of the year or at the Retreat, the Board will assign it to an appropriate committee for research, deliberation, and consultation with various stakeholders. The committee will offer a report on the issue to the Board, after which they will share opinions, brainstorm solutions, and draft a new policy or amend a current one. After any revisions, it will be voted upon, and if an addition or modification is agreed upon, the Policy Manual will be updated.

HCA will utilize, if funds allow, BoardDocs to offer transparency and promote efficiency for all meeting minutes, the Handbook, and Policy Manual. All will be published on the school's website.

Q150. Describe any advisory bodies, councils, or associations listed in the organization chart or to be formed, including the roles and duties of that body, and the reporting structure as it relates to the school's governing body and leadership.



The Board will establish an Advisory Council. It will report directly to the Headmaster. This Council will be composed of staff members and parents, and after the school has grown to Grade Six, students will be invited to join the Council.

The Council will be responsible for making the Headmaster aware of the interests or concerns of the students, teachers, and community and will recommend solutions. This Council has no formal authority, but by bringing issues to the Headmaster's and the Board's attention, HCA will better support and guide students and live up to its mission.

HCA will also have a Parent Association allowing parents to have an active role in supporting the school. This group will assist in fundraising efforts by planning events and coordinating volunteers. The Headmaster may also request the Association to plan and run special events, programs, or parent or community workshops. As with the Advisory Council, the Parent Association has no formal authority and reports to the Headmaster, not to the Board.

The HCA Board will form Advisory Panels to steer the Board in governance, academics, finances, and development. Only the Board has the authority to make decisions and take action in these areas, although the Board will thoughtfully weigh input from the Panels.

Q151. Discuss the school's grievance process for parents and staff members.



Parent Grievance Process

HCA firmly believes that adults must be good character models even in the most challenging situations. Should a parent have a grievance concerning a class or the school administration, that grievance should be resolved using the following chain of command.

Issues that arise in a classroom should always be addressed to the teacher first since the teacher has direct knowledge of the occurrence. Parents should schedule a meeting with the teacher directly or through the front office. Under no circumstance is it ever acceptable for a parent to confront a teacher about an issue with students present, including his/her own child.

If the grievance cannot be resolved with the teacher, the parent should discuss the matter with the Headmaster.

Grievances not resolved by the Headmaster may be directed in writing to the Board by email or a form that will be available on the website. A paper copy will be made available for those without a computer or internet access.

Parents may raise general concerns and during the community comments portion of the Board meeting. The parent must submit in writing the concern or grievance, and no more than two minutes will be granted. Grievances or discussions involving specific personnel will not be discussed at a public meeting. It is recommended that the concern or grievance be addressed in one of the aforementioned steps before using this option.

Staff Grievance Process

Employees with a concern or grievance regarding any other employee or activity of the school should direct the matter first to the individual in question and, if the issue isn't satisfactorily resolved, to the Headmaster. Grievances unresolved by or grievances with the Headmaster should be directed to the Board by email or a form that will be housed on the school's website.

Q152. **Attach as Appendix G Organizational Chart**

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

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

Total Files Count: 5



Applicant Evidence :



Appendix G-Organiz...


Uploaded on **4/24/2023**
by **Karen Manning**

Q153. Attach as Appendix H Charter School Board Member Information Form and Resume

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


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

Resources




Charter School Boar...

Applicant Evidence :



Member Info Forms....

Uploaded on **4/27/2023**
by **Karen Manning**



Founding Board Res...

Uploaded on **4/26/2023**
by **Karen Manning**

Q154. Attach Appendix I For Each Board Member

1. Charter School Board Member Background Certification Statement and
2. Completed Background Check

PLEASE NOTE: A background check that does not meet the following requirements will be deemed incomplete and could jeopardize the submission status of your application.

- **Background check must include a Social Security Trace** (which scans his/her SSN and lists every county/state of residence where that SSN has been used).
- **Background check must include any additional aliases that have been used by the individual.**
- **Background check must include a completed county level check for any county**



returned in the Social Security Trace.

- **Background check must include a completed nationwide check.**

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

Total Files Count: 50

Resources

Charter School Boar...

Applicant Evidence :

APPENDIX I-Backgro...

Uploaded on **4/21/2023**
by **Karen Manning**

Q155. Attach as Appendix J Proposed By-Laws of the Nonprofit Organization or Municipality 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.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

Total Files Count: 3

Applicant Evidence :

Appendix J-Bylaws.d...

Conflict Disclosure-H...

Uploaded on **4/25/2023** by **Karen Manning** Uploaded on **4/28/2023** by **Caroline Kelly**

Q156. Attach Appendix K Articles of Incorporation or Municipal Charter


- If the applicant is a non-profit board of directors, attach a copy of the articles of incorporation from the NC Department of the Secretary of State.
- If the applicant is a municipality, attach a copy of the municipal charter.



Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

Total Files Count: 5

Applicant Evidence :


Appendix K.pdf

Uploaded on **4/21/2023**
by **Karen Manning**

10.3. Staffing Plans, Hiring, and Management

Q157. Projected Staff Complete the staffing chart below outlining your staffing projections. Adjust or add functions and titles as needed to reflect variations in school models. Be mindful that your predicted administration and staff match the projected enrollment noted in Section I, course offerings, and align with the proposed budget.

Upload Required File Type: excel Max File Size: 30 Total Files Count: 10

Resources


Staffing Chart Templ...

Applicant Evidence :


Staffing Chart Q157

Uploaded on **4/25/2023**
by **Karen Manning**

Q158. Staffing Plans, Hiring, and Management Explain the board's strategy for recruiting and retaining high-performing teachers.



HCA job openings will be posted on the HCA website and social media accounts, k12jobspot.com, and many other online job recruiting websites. Jobs will also be advertised through local print and digital media. We will affiliate with local, regional, and national colleges and universities with teacher education programs and partner with employment agencies and firms to recruit regional, national and international candidates. We will attend job fairs held in the area, region and state, with attendance at national fairs if funds allow.

Teacher retention will be one of HCA's high priorities. To retain our administration, teachers, and staff, HCA will develop a supportive, collaborative climate with continual improvement, which will enable teachers to feel supported and valued. Because of the culture, environment, and educational method that will be instituted, the school will be a highly desirable workplace.

Teachers will receive personalized observation and feedback often and have opportunities for high-level professional development. They will be respected and honored for their expertise. Each will be encouraged to mentor, share their best practices with other staff, and lead professional development. The schedule has been designed to provide ample time for planning and collaboration with peers.

Because HCA will differ from the public schools in the county by offering a content-rich traditional classical education and will see a culture of respect, decorum, honor, and manners, the teachers will have enormous pride in the school, experience greater job satisfaction, and will be very satisfied in their chosen profession. The school's reputation in the community will be its best recruiting tool.

Teachers will be offered a competitive benefits package and paid according to the NC Public Schools Salary Schedule. Full-time employees will receive the state health insurance plan, disability benefits, life insurance, and the state retirement plan. The school will incur mandatory unemployment and worker's compensation insurance.

HCA will prioritize funding for annual teacher compensation to recruit and retain highly effective, dedicated teachers. As funds allow, teachers will be given opportunities to earn yearly bonuses based on student growth and achievement data, and an annual stipend for serving as a mentor teacher.

Q159. If already identified, describe the principal/head of school candidate and explain why this individual is well-qualified to lead the proposed school in achieving its mission. Provide specific evidence that demonstrates the capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that (s)he has completed or is currently participating in. If no candidate has been identified, provide the job description or qualifications, and discuss the timeline, criteria, and recruiting/selection process for




hiring the school leader.

A Headmaster for Highlands Charter Academy has not yet been identified.

Q160. **Attach in Appendix O the School Leader's Resume** If the school leader has been identified, include the school leader's one-page resume in Appendix O.

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

Applicant Evidence :


Appendix O.docx

Uploaded on **4/25/2023**
by **Karen Manning**

Q161. **Provide a description of the relationship that will exist between the charter school employees and the school's board of directors.**



The Headmaster is the Board's only employee, and all others are employees of the Headmaster. This person will lead by example and model HCA's virtues and ethics. Trust, unity, and accountability will define the Board and the Headmaster's relationship.

The Headmaster will provide the Board with essential information to help the Board make necessary decisions at every meeting. We expect our Board Chair or designee to communicate regularly with the Headmaster to support decisions and keep the Board apprised of issues or information that may require attention.

Board members will respect the autonomy of the Headmaster. The Headmaster will recruit, hire, train, and lead teachers and staff. The Headmaster will be responsible for teacher and staff evaluations and, if necessary, advising the termination of all other staff. Communication with the teachers and staff will be the responsibility of the Headmaster.

Regarding hiring and dismissals, the Board will give final approval, per the recommendation of the Headmaster and in accordance with the Bylaws, of all final decisions.

The Headmaster will also be responsible for effectively managing finances and operational systems. We foresee our Headmaster having considerable experience in school and organizational leadership and completing ongoing professional development to grow as an administrator.

The HCA Board will create Policies and Procedures and provide oversight to ensure the school is operating, safe, and has what is needed to fulfill the mission. Board members may conduct periodic, scheduled, non-evaluative walk-throughs at the school. They will strive to not interfere with instruction but will have the opportunity to see operations firsthand.

There will be no direct lines of communication from staff to the Board unless previously authorized. If issues arise between employees, the prescribed Employee Grievance procedures will be followed.

Employees and the public will be invited to attend open Board meetings and may sign up to speak during the public comment period. Employees can also participate in the HCA Advisory Council.

Q162. Outline the board's procedures for hiring and dismissing school personnel, including conducting criminal background checks.



HCA will not discriminate in employment opportunities or practices based on race, color, religion, sex, national origin, age, disability, pregnancy, genetic information, sexual orientation, marital status, citizenship status, service member status, or any other characteristics protected by law. This applies to all terms and conditions of employment, including but not limited to decisions to hire, place, promote, train, demote, terminate, lay off, recall, transfer, adjust compensation, and address leaves of absence. Anyone found to be engaging in any type of unlawful discrimination will be subject to disciplinary action, up to and including termination of employment.

All employment with HCA will be "at will." Employment can be terminated with or without cause, and with or without notice, at any time, at the option of either the School or the employee, except as otherwise provided by law.

HCA will prevent nepotism, in actuality or appearance, to the fullest extent possible under the law. Except where expressly required for the prevention of nepotism, the family relationship of an employee or applicant for employment to a member of the Board or any other school employee shall not be a basis for, a factor in, nor an influence upon hiring, assignments, advancement, evaluations, or other personnel actions. However, an immediate family member cannot have another immediate family member under their supervision.

Since teachers are de facto role models for their students, all teachers will adhere to a high standard of personal conduct. To this end, they should speak and act with propriety at all times. Unacceptable behavior, violations of policies and procedures, and/or performance issues may lead to disciplinary action or immediate dismissal. Accusations of misconduct may result in suspension pending investigation.

For the protection of the reputation of the School and an employee's reputation, stringent social media practices will be reviewed with employees annually, which must be abided by.

HCA will screen all applicants for positions with contact with students, including adults applying for employment and adults applying for volunteer positions. All applicants will be required to read and sign a code of conduct agreement with their application. All applicants are required to read and sign a Physical or Mental Abuse and Sexual Abuse and Sexual Molestation Prevention policy. No exceptions will be made to the required screening process, including for people who the interviewer/screener knows or with whom they have worked in the past.

Lists of applicants who are disqualified during the screening process and employees/volunteers who are dismissed because of an offense will be maintained by HCA. During the screening and selection process, HCA will check current applicants against these lists to make sure the applicant has not been previously disqualified or dismissed.

HCA may search the internet for additional relevant information about all applicants. Any



information found that might possibly be relevant is considered, once it is confirmed to be associated with the applicant (recognizing that identity cannot always be definitely determined). For child abuse, absolute disqualifiers include violent behavior and child abuse perpetration history.

Reference checks provide additional information about applicants and help verify previous work and volunteer history. National Criminal background checks are required for anyone over the age of 18 who will have direct, unsupervised interactions with students and will be conducted upon initial hiring (or volunteering) and not less than every three years thereafter. Criminal background checks are one part of child abuse prevention efforts, but they are not comprehensive or complete information about possible prior sexual abuse. Applicants will be screened as a final condition before any offer is binding. Applicants who do not make it through the written applications, personal interviews, and reference checks do not need a criminal background check.

Reasons the HCA Headmaster may dismiss a teacher or staff member include, but will not be limited to, the violation of any employee policy in the HCA Employee Handbook, unsatisfactory job performance, failure to adhere to the scope and sequence of the curriculum, theft, chronic tardiness, material deviations to the curricular courses or subjects without prior Board approval. Failing to notify the School of any absence may be considered a voluntary resignation.

In assisting teachers or staff who are not performing satisfactorily, the Headmaster will document efforts to remediate the issues for two months. The Board will be informed of such activity. If job performance does not improve, the Headmaster can opt to issue a two-week notice of dismissal or immediately dismiss an employee if circumstances warrant. The HCA Board will vote to approve all termination decisions of the School Director.

Q163. Outline the school's proposed salary range and employment benefits for all levels of employment.



The Headmaster's salary will begin at \$65,000 which will increase each year to \$69,000 in Year Five.

Teachers will be paid according to the NC Public Schools Salary Schedule.

Clerical staff will begin at \$30,000 and increase each year to \$33,000 in Year 5.

The HCA teacher assistants, custodian, and transportation employee will begin at \$28,000 and increase each year to \$30,000 in Year 5.

The specialty and EC teachers will begin at \$43,000 and increase each year to \$45,000 in Year 5.

A substitute teacher will be paid \$10,000 which will increase each year to \$12,000 in Year 5.

All full-time employees will be offered the state health insurance plan, disability benefits, life insurance, and the state retirement plan. The school will incur mandatory unemployment and worker's compensation insurance.

Q164. Provide the procedures for handling employee grievances and/or termination.



Employee grievances

Employees with a concern or grievance regarding any other employee or activity of the School should direct the concern first to the individual in question, then, if necessary, to the Headmaster. The employee must indicate in writing (email will be accepted) how the action has violated a School Policy or Procedure, Board Policy, or law/regulation, details of the actions, and the place, date, and time of the incident. The Headmaster will respond within five business days from the time the grievance is received. If the employee is satisfied with the decision after a reply from the Headmaster is received, the matter will be considered resolved. The employee will then submit their satisfaction in written form to the Headmaster.

Grievances that are unresolved by the Headmaster should be directed to the Board in writing or by using a Grievance Form that will be available on the HCA webpage. The Board will consider such an appeal at its next regularly scheduled monthly meeting, provided the meeting is more than seven days after the filing. The Chair of the Board may call a special meeting of the Board to consider the appeal following HCA Bylaws. The Board will evaluate and discuss the grievance at the meeting per Open Meetings laws. Before the meeting, at the Board's discretion, an investigation may be conducted, or additional information regarding the grievance may be collected, including interviews if needed. The one filing the grievance or appeal must attend the meeting. At that meeting, the Board will decide how to resolve the grievance. The Board's decision concerning the grievance will be final.

Grievances with the Headmaster should be directed to the Board in writing or by using a Grievance Form that will be available on the HCA webpage. The Board will address concerns with the Headmaster, and the aforementioned steps for such a grievance will be followed.

Employee Termination

Reasons the HCA Headmaster may dismiss a teacher or staff member include, but will not be limited to, the violation of any employee policy in the HCA Employee Handbook, unsatisfactory job performance, failure to adhere to the scope and sequence of the curriculum, theft, chronic tardiness, material deviations to the curricular courses or subjects without prior Board approval. Failing to notify the School of any absence may be considered a voluntary resignation.

In assisting teachers or staff who are not performing satisfactorily, the Headmaster will document efforts to remediate the issues for two months. The Board will be informed of such activity. If job performance does not improve, the Headmaster can opt to issue a two-week notice of dismissal or immediately dismiss an employee if circumstances warrant. The HCA Board will vote to approve all termination decisions of the School Director.



Q165. Identify any positions that will have dual responsibilities and the funding source for each position.

During the first few years, Highlands Charter Academy's personnel will serve multiple responsibilities; however, until finances are established; it will be necessary to use state funding for all personnel positions. Once EC funding is received and/or Title I funding is established, the teacher positions and EC support will be moved over.

1. The Administrative Assistant may also serve as a translator (local funds)
2. Custodians may also serve in a transportation and maintenance role (local funds)
3. Teacher Assistants may serve as substitutes, if one available, and may serve as EC support (state funds and EC funds if applicable)

Q166. Describe the plans to have qualified staffing adequate for the anticipated special needs population and means for providing qualified staffing for EL and gifted students.

Highlands Charter Academy will nurture all students through a strong curriculum, nurturing, and differentiated instruction. HCA will use data, work samples, and classroom observations to identify those students that would benefit from additional services.

As expanded upon in Q119, HCA will provide all families with an English Language Survey to ensure that the school effectively serves all students. This survey will allow the school to correctly identify those students with services and provide accommodations as necessary. HCA will hire an EL Certified teacher. Doing so will allow the school to not only serve students but to assess students through WIDA.

HCA will hire a teacher that is also AG certified. Since HCA's growth plan begins with K-2 and then will increase grades each year, it will be imperative to nurture all students and then add layers to create an AIG plan once the school is firmly established (the plan is addressed in Q120).

Q167. Provide a narrative detailing the roles and responsibilities, qualifications, and appropriate licenses that each position must have to be hired by the school's board of directors and effectively perform the job function(s).



Headmaster Duties and Responsibilities

- Provides general management of all school operations, including academic, financial, personnel, regulatory, transportation, food services, and facility areas.
- Successful school start-up responsibility beginning approximately one year prior to school opening.
- Facilities development and procurement of all furnishings and supplies.
- Responsible for hiring all school staff.
- Observes and can effectively coach teachers at defined intervals; documents results and provides feedback as mentor and supervisor.
- Marketing of school to the community giving monthly meetings at libraries or other locations to ensure enrollment quota is met.
- Fundraising and grant writing as needed.
- Reports at regular school board meetings on the status of the school, including financial accounting and plans for upcoming activities.
- Represents the school as the senior executive leader in interactions with the public, the school constituencies, the authorizer or accreditor, and other government agencies.
- Communicates and ensures compliance with all board policies.
- Coordination with NC OCS assuring all commitments are met.

Headmaster Qualifications

Master's Degree in education or educational administration/supervision and five years of leadership



experience considered relevant by the Board.

- The ability to communicate effectively in both oral and written forms.
- A general understanding of personnel management principles, including recruiting, hiring, supervising, and evaluating, as well as individual and organizational development.
- The intellectual and emotional strength to have difficult conversations when necessary and the prudence to know when that is.
- A general understanding of financial management principles, including planning a budget and the skills to manage it throughout a school year; he or she understands the needs and expectations of regular auditing and a proven system of sound fiscal controls and processes.
- An understanding of the school's respective state accountability and accreditation systems for public charter schools, as appropriate, and laws relevant to same.
- The fortitude to act with fidelity to the scope and sequence of the HCA model for classical education.
- The prudence and insight to understand and accomplish local, state, and federal compliance regarding all aspects of the school.
- Has a recognizable executive aptitude for the business and operational aspects of school leadership.
- Can build an administrative team. The Headmaster will thoroughly know and support our Classical education mission and know how to hire well to support that mission.
- Has a clarity of focus, yet is open to ideas and implements the best of them from his or her community, not just from personal preferences.
- Is pleasant, engaging, personable, and empathetic—important traits as he or she interacts with parents, benefactors, community members, teachers, students, and others. The school leader knows how to build trust through excellent communication, which often means only listening and



being consistent with expectations and follow-through. He or she is firm and kind, prudent and just.

-

Understands and communicates with the broader classical movement to promote education that is elevating and high-minded.

-

Is public-spirited and ambitious about the school and its effect on the wider community. He or she is committed to the local community as an active participant and an energetic advocate for classical education as being suitable for all learners of every background.

K-6 Teachers' Duties and Responsibilities

-

Manages development and implementation of the school program of instruction for specific grades and classrooms.

-

Create and instruct a program of study that complies with state standards and HCA classical goals and objectives while also meeting the individual needs, interests, and abilities of students as much as possible.

-

Establishes and communicates clear objectives in lessons, assignments, and projects to work in tandem with curriculum goals.

-

Employs instructional methods and materials that are most appropriate for meeting stated objectives in student instruction.

-

Leads assigned classes in the locations and at times designated.

-

Demonstrates commitment to the school's mission, academic program, and student academic outcomes as outlined in the approved charter.

-

Establishes, models, and maintains standards of appropriate student behavior and discipline to achieve a functional learning atmosphere in the classroom and assists in its maintenance campus-wide.



Education/Certification/Experience Requirements

- Bachelor's Degree from an accredited institution in a related field or is working toward a degree or plans to do so.
- Valid teaching certification in North Carolina is preferred but not required.
- Experience working with children in an educational setting required
- Classical Curriculum experience is preferred but not required.
- Demonstrated ability to work with students to achieve individual and school goals in partnership with staff and parents in a professional manner
- Comfortable implementing school safety and security procedures

10.4. Staff Evaluations and Professional Development

Q168. Identify the positions responsible for maintaining teacher license requirements and professional development.

The Headmaster will be responsible for maintaining teacher license requirements and professional development.

Q169. Provide a detailed plan noting how the school will mentor, retain and evaluate staff in a format that matches the school's mission and educational program. The plan should also describe how the school will meet the teacher certification and licensure requirements for teachers as prescribed by state and federal law. Be sure this overview matches with the projected staff and funding of the proposed budget section.



Mentoring teachers

All new HCA teachers will be assigned a mentor. The teacher mentors will work closely with mentees to develop initiatives, plan lessons, and develop classroom management strategies. The mentor teacher will regularly observe and provide feedback to the mentee. Such a program will ensure that new teachers are successful and feel supported and valued by HCA. Veteran mentor teachers will develop a collaborative relationship among HCA teachers leading to a caring family atmosphere among teachers. They will assist new teachers in cultivating a love of learning for the students, understanding and implementing the Classical education model, and creating an environment where students will desire to seek truth to discover what is good and beautiful in life.

All mentoring practices will be aligned with the NC Mentoring Standards.

Retaining teachers

The goal of Highlands Charter Academy is to develop a school where not only parents/guardians desire their children to attend, but the very best teachers will aspire to work at HCA and will remain for many years.

Teachers will receive personalized observation with constructive feedback, undergo formal evaluations, and have many opportunities for top-notch professional development that targets their specific areas of interest and need. They will be provided autonomy concerning instruction and classroom management within the classical education model. HCA teachers will have a strong sense of ownership and pride in their profession and the school.

Evaluating staff

Highlands Charter Academy will abide by the NC State Board of Education Policies regarding the Teacher Performance Appraisal process. The school will follow the NCEES teacher evaluation system (teacher self-assessment, professional development plans, pre-observation conference, three formal observations with post-conferences, a peer observation with post-conference, summative evaluation conference, and summary rating form).

Meet the teacher certification and licensure requirements for teachers as prescribed by state and federal law.

Highlands Charter Academy will work closely with other NC charter school leaders and NCDPI to ensure that our teachers meet all teacher licensure renewal criteria. Proof of their teacher's license will be a part of the application process.

HCA will assist teachers in keeping their licensure and certifications in line with the requirements from NCDPI and SBE policies.



Q170. Describe the core components of the professional development plan and how these components will support the effective implementation of the educational program. Describe the extent to which professional development will be conducted internally or externally and will be individualized or uniform.



Core components of the professional development plan

For HCA teachers to cultivate a love of learning, they must indeed love learning themselves. The continued development of teachers will not only benefit them professionally but will also yield dividends in students' academic and character growth. Teachers will be supported by targeted, relevant, and beneficial professional development opportunities for the academic performance, moral character development, and civic virtue growth of HCA students. The plan will also create an environment where students will desire to seek truth in order to discover what is good and beautiful in life.

Professional development core components to be covered will be: 1) Subject Content/Academic Standards, 2) Instructional Methodology/Faculty Development, 3) Training in Classical Education, 4) Literacy Essentials, 5) EC/Gifted - Education of Special Populations, 6) ELL - ESOL Curriculum and Materials Development, 7) Reading - Foundations of Reading Instruction, 8) Reading - Application of Research-Based Instructional Practices, 9) Reading - Foundations of Assessment, 10) Reading - Foundations and Applications of Differentiated Instruction, 11) Singapore Mathematics, 12) Core Knowledge Curriculum and Implementation, 13) Classroom Management, and 14) School Safety/Safe Learning Environment/School Culture.

Throughout the school year, professional development sessions will be offered that will include: 1) Technology Integration/Digital Learning Support, 2) Assessment and Data Analysis/Problem-Solving, 3) Management/Leadership/Planning, 4) General Support, and 5) Student Growth/Achievement /Success.

How components will support the effective implementation of the educational program.

All core components and other professional development opportunities listed above were specifically selected to lead to the effective implementation of the content-rich classical educational model.

The extent to which professional development will be conducted internally or externally and will be individualized or uniform.

Several professional development days at the beginning of the school year will be uniform. Designated professional learning days throughout the year will be more individualized with either external or internal support in a particular subject or best educational practices related to classical education.

Independent professional development may include workshops, independent or small group study, or one-on-one professional development among mentors/mentees.

Teachers' work days will allow teachers to reflect, analyze data, plan, learn, and collaborate with



faculty and external partners. There will be several early release days for teachers to engage in professional learning opportunities and have time to collaborate and plan.

Q171. Provide a schedule and explanation of professional development that will take place prior to the school opening. Explain what will be covered during this induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods.



Several weeks before the first day of school, teachers will participate in 15 full development days, accounting for roughly 40% of the total professional development hours for the school year. During this time, teachers at the school will receive in-depth training on the core curriculum, core knowledge, Singapore Math, Socratic Seminars, and instruction in virtue and character development.

Sixty hours of professional development will be carried out before the start of each school each year. During the school year, 45 hours will be taken, and after school ends, there will be 24 hours of development. Summer opportunities will also be made available.

Core Knowledge Training

Highlands Charter Academy will ensure appropriate training and technical assistance in Core Knowledge will be provided so that all school teachers will be given the greatest possible support to implement the curriculum successfully. Teachers will be introduced to the program and the benefits this approach affords students. HCA will ensure that teachers clearly understand the theories and research that inform the Core Knowledge approach. They will be taught how to self-assess the implementation of Core Knowledge to identify strengths and areas of need. A process will be established for piloting material and reflecting on results.

Our teachers will receive a minimum of five days of Core Knowledge professional development during the school's initial year. All teachers will participate in the "Getting Started with the Sequence" program. The Headmaster will participate in Core Knowledge Coordinator and Leadership Institute workshops, which can be scheduled during the school's professional development days throughout the school year (the first three days will take place before the opening of HCA).

Core Knowledge provides both lesson plans and an overview of topics for each grade level in the areas of Language Arts, History and Geography, Visual Arts, Music, Mathematics, and Science. The Sequence guides teachers in what instructional resources must be available to deliver the curriculum completely.

Singapore Math

HCA will provide ongoing training to establish Singapore Math expertise among teachers. The program must be followed with fidelity to succeed; therefore, teachers will be trained to assess students, place them in the appropriate skill groups, and implement the lessons. Teachers must be able to determine mastery of the material before a student is permitted to move to the next level. HCA will affirm that teachers are thoroughly trained and highly knowledgeable in using the Singapore strategies and methods.

The Socratic Seminar



HCA will provide thorough training for teachers in The Socratic Seminar. This method of teaching is designed to engage students in intellectual discussions by responding to questions using questions (instead of answers). Students read a text, and teachers ask them open-ended questions to stimulate discussion.

HCA teachers will learn to formulate questions that will encourage critical thinking, the analysis of meaning, and how to teach students to express ideas with clarity and confidence. They will learn how to train students in Socratic Seminar discussions and the teaching of diverse learners.

Virtue Instruction

Classical education provides, in part, moral education. It cultivates human nature so it can grow properly and flourish. Teaching students to cultivate moral virtue, guides us into freedom by making us self-reliant and responsible, capable of governing ourselves and taking part in the self-government of our communities.

HCA teachers will be oriented in virtue instruction. Training will include pillars of character, discipline and classroom management, mediation and conflict resolution, effective communication, integrating character education into the curriculum, and discussion techniques to teach ethical reasoning.

Q172. Describe the expected number of days/hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan.



Highlands Charter Academy will allow teachers to attend NCDPI-sponsored Professional Development (PD) and PD related to classical education. HCA has embedded virtual days and workdays in the calendar to provide PD and mini-conferences to keep teachers' skills and licensures up to date. That said, the administration will be responsible for researching, attending, and bringing back PD to their staff. Once a week, there will be data discussions/training, and during PLCs, discussions will revolve around best practices. Professional development will be based on data and DPI requirements.

In the initial year(s), it may be necessary for a teacher to attend PD and train other teachers (train-the-trainer model). It will also be essential for the administration to participate in training (this way, there is no need for a substitute) and provide training to teachers and staff. Each teacher is required to have the following CEUs to continue with their certification:

Grades K-5

- 3 Subject Area
- 3 Literacy
- 2 Digital Learning

In order to ensure teachers meet these requirements, HCU has allowed for 5 calendar days for training and will allow teachers 5 professional days with a substitute to ensure they meet all requirements. As the school provides training during PLCs or afterschool, they will log attendance to provide additional support in licensure and provide best practices.

Additionally, on the NCDPI and NCEES websites, there are self-paced and curriculum-specific modules, allowing teachers to receive CEUs in best practices and will assist in their licensure.

At times, these trainings will need to be conducted during PLCs, depending on the need and grade level, and after-school if it impacts the entire school. Once the school is developed and a look at the calendar, HCA will be able to build in teacher workdays and create mini-conferences where teachers can learn from each other.

The administration will create teacher walkthroughs and provide teachers with opportunities to watch good practices. This can be accomplished during PLCs, and debriefs can be conducted after-school. This allows for a common conversation regarding a common theme.

Though professional development has been allocated in the budget, the school will also apply for the NCSIP grants that provide additional PD in both reading and math. Some of these trainings are provided during the summer, where a stipend can be provided (supplied by the grant) or during the school year (the grant can pay for a substitute).



10.5. Marketing, Recruitment, and Enrollment

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

Q173. Marketing Plan Marketing to potential students and parents is vital to the survival of a charter school. Provide a plan indicating how the school will market to potential students and parents in order to reasonably reflect the racial/ethnic and demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-218.45(e)).



Achieving total enrollment in the first and subsequent years is a high priority for Highlands Charter Academy. Because the Founding Board has a member who has worked in Marketing for over 30 years and has been the Director of Marketing for the local community college for 17 years, she is well-versed in promoting an educational institution.

Marketing for Highlands Charter Academy began in January of 2023 and will continue indefinitely. Most of the promotion methods in the Marketing Plan will continue throughout the start-up phase and after the school is established and operating.

MARKETING PLAN 2023-24

Target Audience: The current target audience for HCA is parents of children aged between 3 and 5 years old who are looking for an education option for their children.

Brand Image: A strong brand image has been developed for HCA.

Because the Gaels from the Scottish Highlands and Islands and their descendants settled our area of the state and due to the heavy Scottish influence, Highlands Charter Academy was the name chosen for the school. The logo is composed of Scottish elements. The school mascot will be Scottish-related (undecided at this point), and the school uniforms will contain a plaid.

Website: Launched in January 2023, the HCA website is attractive, informative, and search engine optimized. It contains an "Expression of Interest" form to help determine the support the school would receive from the community and enrollment projections. Because we desire to attract families from the Hispanic community in the northern part of our county, the website has a Spanish read option. The website will be the primary source of information for HCA and will be maintained and updated regularly. The site address and a QR code to the site are prominent on all promotional material. URL: www.highlandsacademy.org

Social Media Marketing: Social media is one of the most effective methods to reach parents, especially mothers, of young children. HCA has a Facebook page that was created in January. Regular Facebook posts promoting the school and asking for completion of the "Expression of Interest" form are made to community groups that contain parents of young children. Such posts link to the website.

Email Marketing: Every person who submits an interest form from the website receives a personal follow-up email. Currently, we use a free Gmail email address. As we move forward, email addresses using @highlandsacademy.org will be established. HCA will periodically develop and implement email campaigns.

Digital Ads: HCA advertises using Google search ads and will continue to do so. HCA utilizes Facebook/Instagram ads and boosted posts for advertising. We plan to advertise on Spotify and



YouTube.

Print Materials: HCA has flyers, brochures, rack cards, and QR Code cards posted and placed in community centers, recreational facilities, stores, libraries, grocery stores, restaurants, etc. Again, because we hope to attract families from the Hispanic community in the northern part of our county, our print material is also created in Spanish and was carefully proofread by Spanish-speaking educators at the local community college. We heavily post our flyers and leave print materials in Robbins, which has a high Hispanic population.

Local Community Outreach: The Founding Board has addressed community groups, the Carthage Town Council, and school board members, informing them of the effort to begin HCA. The Board will continue to present to such groups. HCA is currently and will continue to be a visible presence at community events where Board members staff a table with promotional material and discuss the school with those interested in learning more. They will also meet with local business leaders. Plans are in the making to present HCA to area Rotary and Kiwanis clubs and to the Chamber of Commerce.

Press Releases: Press releases will be a routine method of reaching the public. In addition to being sent to the local news outlets, they will be posted to the school's website and shared on social media.

Continuous Improvement: The Board will continuously monitor the marketing plan and make adjustments as necessary. This will help to ensure that the plan remains effective and up-to-date.

Applicant Comments :

A pdf of our brochure and flyer are uploaded. Both are also created and distributed in Spanish versions.

Applicant Evidence :

	
Brochure.pdf	Flyer.pdf

Uploaded on **4/21/2023** by **Karen Manning**

Uploaded on **4/21/2023** by **Karen Manning**

Q174. Describe how parents and other members of the community will be informed about the school.



Because the current ages of our opening population in 3-, 4-, and 5-year olds, a list of all Moore County daycares has been obtained. We are in the process of contacting the larger ones to request assistance informing parents about HCA. We hope to promote HCA through the centers by sending our brochures or QR Code Cards home with the children, posting flyers, and to promote in their email newsletters.

We plan to contact churches and request they help us promote HCA to their parents. Some may be able to use our smaller flyers as inserts into bulletins, others put them into diaper bags and children's take-home materials, and we may be able to post flyers in their community rooms. Several representatives from the Board continually provide information about HCA to those at their churches and plan to address small groups as occasions arise.

HCA is currently and will continue to be a visible presence at community events. Board members displayed and were present to talk with people at the School Choice Expo held in Moore County on January 28. Members were at several community Easter Egg Hunts in March and April, where they talked with interested parents, distributed print materials, and obtained contact information from those interested. One of the events, Grace in the Park, was specifically directed toward the Hispanic families in Robbins. In a continued effort to encourage Hispanic children to enroll at HCA, we plan to display at the Robbins Cinco De Mayo community event in May and, in September, the significant Mexican Independence Day event. We will staff a booth at the ever-popular Carthage Buggy Festival in May, strategically asking for it to be near the free children's play area. The team plans to wear t-shirts with "Ask Me About a New Moore County Charter School" imprinted on them. We will order logo-imprinted give-aways.

We will inform local realtors of HCA so they can pass along information to new Moore County families.

The community is currently being blanketed with flyers on bulletin boards in gyms, libraries, restaurants, community centers, stores, and wherever we anticipate parents of young children will be present. Toy stores and children's clothing stores now offer the HCA QR Code cards and brochures to customers as they check out.

Q175. Describe your plan to recruit students during the planning year, including the strategies, activities, events, and responsible parties. Include a timeline and plan for student recruitment/engagement and enrollment, with benchmarks that will indicate and demonstrate suitable recruitment and enrollment practices over time.



The aforementioned marketing efforts will continue throughout the planning year. We will continue to staff booths at community events and promote HCA on Facebook/Instagram, Google, Spotify, and YouTube.

The website will be updated as necessary. Google analytics will be utilized to learn more about visitors and how to reach look-alike audiences. We will stay on top of trends, such as new social media platforms or tools.

Regular posts to the HCA Facebook page will be scheduled.

Print materials will be updated as necessary. Posts to social media will continue.

All Board members will spread the word about HCA through social media, community forums, churches, neighborhoods, and social circles. They will continue to establish and nurture relationships with important community partners such as the Boys and Girls Club, Moore Buddies, and CARE Group, Inc. The Board will outline and define the partnerships with each organization and how they may assist in marketing efforts.

Summer 2023: Continue to obtain the names and contact information of interested families. Identify events for children (preschool storytimes at local libraries, craft/art events, etc.) and request to attend these events from the sponsors. Continued outreach to daycares and churches, continued flyer posting, and brochure distribution.

Fall/Winter 2023/4: Continue to obtain the names and contact information of interested families. Attend AutumnFest, Christmas Parades and Tree-Lighting events (Southern Pines, Carthage, Seven Lakes/West End, Robbins, Aberdeen, Pinehurst), continued representation at family and children's events.

Spring 2024: Set dates for open Q&A forums. Begin a monthly email newsletter.

Q176. Describe how students will be given an equal opportunity to attend the school. Specifically, describe any plans for outreach to: families in poverty, academically low-achieving students, students with disabilities, English learners, and other students at-risk of academic failure. If your school has a specific area of focus, describe the plan to market that focus.

HCA's marketing plan outlined prior is highly focused on recruiting and admitting a diverse array of students, whether from families living in poverty, students with disabilities, English learners, academically gifted, or those of low academic performance. We are making a very concentrated effort to attract families from the areas of the county that have low-performing public schools and no school choice.



Q177. What established community organizations would you target for marketing and recruitment?

Our Board will continue to forge partnerships with prominent community organizations that will be mutually beneficial for these organizations and the school

- Daycares and Preschools
- Churches
- Community Centers
- Local Libraries (storytimes, programs, and events for children and families)
- Local Youth Sports Organizations
- Dance Studios
- National Athletic Village (a very popular private sports and recreation facility)
- Moore Buddies Mentoring (programs include one-on-one mentoring and a structured day program for at-risk youth.
- Moore County Literacy Council (programs include one-on-one low literacy adult tutoring, citizenship program, and Motherread/Fatheread®)
- Professional and Philanthropic Organizations

10.6. Parent and Community Involvement

Q178. Describe how you will communicate with and engage parents and community members from the time that the school is approved through opening.



Highlands Charter Academy will employ numerous avenues for providing information to parents/guardians and community members from approval through the school's opening.

The website, www.highlandscademy.org, will be the primary source of information and will remain current and updated regularly by the Board marketing committee. The web URL will be included on all print materials, emails, social media promotions, and press releases.

The HCA website will inform the community about the school's mission, vision, basic tenets of our education plan, all necessary application and enrollment information, a list of all Board members and employees when hired, Board meeting dates and minutes, and the school calendar will be included.

HCA will also communicate by having a solid presence on social media platforms. The Facebook page will contain multiple new posts each week.

HCA will also engage with the community and prospective families in personal ways. We will maintain partnerships with local organizations and nonprofits such as local churches, Moore Buddies Mentoring, The Moore County Literacy Council, The Boys and Girls Club, and Communities in Schools. We will continue to schedule presentations with local preschool and daycare programs.

Each member of the Board has unique connections and relationships with local community leaders, city council persons, church and parish leaders, businesses, and nonprofits, and will utilize these connections to networks to inform others about HCA.

We will continue to have a presence at community events such as Expo of Schools, Springfest, Autumnfest, music events, Grace in the Park, Buggy Fest, etc.

Each family enrolling their child in Highland Charter Academy will receive a personal phone call to thank them for trusting HCA with their child's education and answer questions.

Families will be invited to follow HCA's social media accounts and will receive an email newsletter bimonthly.

Orientation will set the tone for the school year. Families will have an opportunity to meet the Board, staff, Headmaster, and teachers. Parents/guardians and students will have an opportunity to become acquainted with each other and establish relationships.

Before the first day of school, parents/guardians will be asked to bring their Elementary student to the "See Your Classroom" day. Teachers will have an opportunity to meet the students and parents/guardians in the classroom, allowing the children to become familiar with the surroundings and making the first few days of school much less stressful for the student.



Q179. Describe how you will engage parents in the life of the public charter school. Explain the plan for building engaging partnerships between the family and school that strengthen support for student learning.



Highlands Charter Academy will have open and consistent modes of communication between the staff and the student's parents/guardians.

Administration-Parent Partnership

The Enrollment Packet distributed at Orientation will include the HCA Student/Parent Handbook. As contributing members of the HCA community, the handbook will contain goals and expectations of the Headmaster, teachers, staff, students, and parents.

The Headmaster and teachers will make a concerted effort to get to know the parents, help them feel at ease, welcome in their child's school, and help them understand their shared responsibility in their child's education.

Monthly HCA Newsletters will be distributed via email. Parents without an email account will be mailed a print copy. If the parents are non-English speaking Hispanics, a Spanish-translated version will be emailed or sent home with the child(ren),

HCA will provide Parent Workshops on topics such as study skills, homework strategies, and effective communication to help them better support their children's learning at home.

Parents/guardians will be encouraged to attend the many events at the school. These will include plays, concerts, recitals, art exhibits, and much more. HCA will provide ample ways for parents to get involved through volunteer opportunities, field trips, serving on the School Advisory Council, or volunteering in the classroom. Even grandparents will be invited to attend school and have lunch with their grandchild on an annual Grandparent's Day.

Teacher-Parent/Guardian Partnership

Parents/guardians will be encouraged to communicate with the teacher if there is an issue or question. They will be asked to respond to unanswered phone calls from the teacher within 24 hours. Parents/guardians are to attend three formal parent-teacher conferences to discuss the student's progress.

Elementary and Middle School teachers will phone each of their student's parents/guardians in the first two weeks of school to reinforce how thankful they are to have their child at Highlands Charter Academy and acknowledge some of the child's positive attributes.

The Elementary and Middle School teachers will provide a steady flow of information so parents/guardians consistently know what their child is studying, what they need to reinforce at home, which Core Values their child is exhibiting, and those they need to work on. A weekly form will note homework, behavior, and learning goals. The teacher will send home student work samples highlighting the child's strengths and areas that may need improvement.



Report cards will not only provide a grade for each subject but will provide detailed information to inform parents where students stand on their goals and where improvement is needed. A parent-teacher conference will take place several times a year to keep parents informed about their children's academic progress and to discuss any concerns or challenges.

Q180.If already identified, describe any programs you will offer to parents and/or the community and how they may benefit students and support the school mission and vision.

Because the Highlands Charter Academy curriculum contains notable works of literature, the school will explore how it can offer literacy programs for parents and their children to promote early reading and language development. These programs could include storytimes, reading circles, and other activities to encourage a love of reading and learning for not only students but the HCA families as a whole and the community.

Service-learning programs will be implemented in the upper grades, providing students with opportunities to engage in community service projects. Such programs will help HCA students further develop leadership skills, a sense of civic responsibility, and a greater understanding of social issues. We want our young people to develop empathy, compassion, and a sense of responsibility to their community.

HCA will offer periodic workshops, seminars, and training sessions for parents on topics such as effective parenting, child development, academic support, and technology use. These programs will provide parents with practical strategies and resources to help their children succeed academically and socially.

Arts and culture programs will be of utmost importance at HCA. Visits to museums, concerts, plays, and museums will be in addition to classroom learning, creating a love for the good, the beautiful, and the true. Local visual artists will be invited to exhibit works throughout the school and present Artist Talks for the students. Musical artists will be invited to perform for the students and tell about their careers, as will actors, dancers, filmmakers, sculptors, and photographers.

Once HCA builds or purchases a permanent school facility, Sandhills Community College English Language Acquisition and High School Equivalency programs will be offered the use of rooms to teach classes.

10.7. Admissions Policy

Q181.Weighted Lottery Does your school plan to use a weighted lottery? The State Board of Education may approve an applicant's request to utilize a special weighted, or



otherwise limited, lottery in certain circumstances. If the charter applicant wishes to deviate in any way from the open lottery normally utilized by charter schools, the following requirements must be met:

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

Yes

No

Q185. Provide the school's proposed policies and the procedures for admitting students to the proposed charter school, including:

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



Tentative dates for the open enrollment application period, enrollment deadlines and procedures.

Applications for enrollment at Highlands Charter Academy will begin on October 1, 2024. Applications will be available online, by mail by request, and in the office (if available at the time). The open enrollment period will close at 11:59 pm on March 1, 2025. The applications will be reviewed for completeness, checked for a valid NC address, and will be entered into a database. If the number of applications exceeds the maximum number of student spots on March 1, a lottery process will be used to determine enrollment.

Policies and procedures detailing the open enrollment lottery plan, including policies regarding statutory permitted student enrollment preferences.

If a lottery is required due to more applicants than availability, Highlands Charter Academy will notify all applicants and the public of the date, time, and location of the lottery through email, the HCA website, and social media. Names of students with a completed application on file will be drawn by grade level during the public lottery. Siblings will be entered as one surname, with all siblings accepted if one is drawn.

Applicants that get first-priority admission include children of current employees or board members (limited to 18% of the total school enrollment), current students' siblings, and siblings of students who have graduated from Highlands Charter Academy (within four years). Priority will also be given to a former student who was enrolled at HCA within the last two years but left due to academic study abroad, competitive admission residential program, or vocational opportunities of the parents. These applicants will be automatically placed on the acceptance list. All other completed applications will be assigned a unique number, and a ticket will be published for each applicant. A public lottery will be held on March 15 and will be held in accordance with all NC charter school laws.

The lottery will be a continuous calling of numbers until all of the spots are filled. The remaining tickets will be drawn and placed on the waitlist for each grade in the order in which they were pulled.

Applications admitted after March 1, 2025 will be added to the end of the waitlist in the order in which they are received.

Parents of students accepted will receive notification via text or phone call and email and will be prompted to respond within 48 hours to accept or decline the position. When positions are declined, HCA will move to the next student on the waitlist.

Students will not have to re-enroll each year, but an "Intent to Return" form must be completed before February 15 each year.



Highlands Charter Academy will not discriminate in the lottery against any student based on race, ethnicity, gender, religion, national origin, creed, intellectual or physical ability, measures of achievement, or athletic performance. Unless new legislation dictates otherwise, HCA can refuse admission to any student who has been expelled or suspended from the public school until the period of suspension and expulsion has expired (G.S. 115C390.5 through G.S. 115C390.11).

Explanation of the purpose of any pre-admission activities (if any) for students or parents.

Once accepting the position, parents/guardians will receive a registration packet in the mail and will be required to attend an Orientation Session to ensure all paperwork is complete, to meet the staff at Highlands Charter Academy, and for the student to take a diagnostic assessment to provide placement information.

Once the family attends Orientation and the registration packet is deemed complete, the student has completed the enrollment process. If a family does not complete the registration process prior to June 1, the seat may be forfeited, and the next applicant on the waitlist will be accepted. If a student does not attend the first day of school and does not notify the school of the reason for the absence, the family will forfeit the student's enrollment and must complete another application to be considered in the future.

Policies and procedures for student withdrawals and transfers.

If a family wishes to withdraw a student from Highlands Charter Academy for any reason, they are asked to provide at least three days' notice in order for HCA to gather all relevant and required records. Families who withdraw a student will be asked to complete a Withdrawal Survey for the school to collect and analyze data regarding withdrawals. Highlands Charter Academy will provide all relevant and required documents to the student's new school within five business days of receiving a transfer form from the child's new school. If a family chooses to later re-apply to HCA after a withdrawal, they must complete a new application and participate in the lottery process again.

10.8. Certify

Q186. **This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.**

- Yes
- No

Q187. **Explanation (optional):**



2023 NC CHARTER APPLICATION
NC Public Charters





11. Operations

11.1. Transportation Plan

- Q188. Describe in detail the transportation plan that will ensure that no child is denied access to the school due to lack of transportation. Include budgetary assumptions and the impact of transportation on the overall budget. The details of this plan should align with the mission, identified need for the charter school, targeted student population, and the budget proposal. If you plan to provide transportation, include the following:
1. Describe the plan for oversight of transportation options (e.g., whether the school will provide its own transportation, contract out for transportation, attempt to contract with a district, or a combination thereof) and who on the staff will provide this daily oversight.
 2. Describe how the school will transport students with special transportation needs and how that will impact your budget.
 3. Describe how the school will ensure compliance with state and federal laws and regulations related to transportation services

Highlands Charter Academy will subscribe to CarpooltoSchool, allowing our families to leverage technology in organizing carpools and walk groups. School administration approves who has access to the platform, ensuring that only parents and authorized guardians can arrange pooling options.

Many families of lower socioeconomic status may be unable to carpool and need assistance transporting their children to school. HCA will provide families with a survey to determine where the need for transportation is the greatest and seek to serve those areas. The routes will be concentrated in easily accessible locations with multiple pick-up and drop-off points. HCA will acquire passenger vans for groups of children to ride together, picking them up at multiple cluster stops based on need and accessibility. Vans allow any employee of HCA with a current driver's license to transport children without the need for a CDL license.

HCA will comply with all regulations and provide transportation for any student with an IEP that explicitly states the child requires transportation to access education.

If we learn of students needing transportation and do not have a van picking up students in that area, we will certainly attempt to assist in getting the children to school. After the first 20 days of school, we will survey parents/guardians to ensure that transportation is not a barrier to attendance, and will adjust the transportation zones if needed based on the results from the survey.



11.2. School Lunch Plan

Q189. Describe in detail the school lunch plan that will ensure that no child is lacking a daily meal. The details of this plan should align with the targeted student population and school budget proposal. If the school intends to participate in the National School Lunch Program, include the following components in the response:

1. How the school will comply with applicable local, state, and federal guidelines and regulations;
2. Any plans to meet the needs of low-income students; and
3. Include how the school intends to collect free- and reduced-price lunch information from qualified families. If a school intends to participate in the Community Eligibility Provision, describe the methodology the school will use to determine eligibility.



Highlands Charter Academy recognizes the many benefits of offering a healthy lunch to students. Not only does it improve academic performance, but a good lunch can also reduce absenteeism due to hunger or illness. When schools provide lunch, they can offer a balanced meal with the proper nutrients to promote healthy eating. Providing lunch at school can be convenient for busy parents who may not have time or resources to pack their child's lunch daily.

Highlands Charter Academy is fully committed to ensuring that no child lacks a daily meal, whether due to financial need or simply because they forgot their lunch. HCA will participate in the National School Lunch Program for breakfasts and lunches. All students will have the opportunity to participate in the school's child nutrition program, and eligibility will be determined whether the meals will be free, reduced, or full-priced based on an application completed by parents/guardians at the time of enrollment at the beginning of the academic year and each year after that.

All students will have the option of bringing their lunch.

Highlands Charter Academy will seek a partnership with Moore County Schools to provide breakfast and lunch for our students. HCA will pick up those meals from a location that MCS requires. HCA understands that we will be responsible for obtaining a heating and a cooling unit to keep food at the proper temperature.

However, if the local county school system, does not wish to support HCA with the nutritional needs of its students, we will partner with local businesses to provide meals to our families at a low cost. HCA will explore options to contract food services. The Board will analyze all options based on cost, experience, and ability to deliver appetizing, nutritious meals.

The lunch schedule will be published monthly, and students can buy from the catering service or bring their lunches. For those students who are financially unable to bring a lunch, we will contract with a local catering service to provide one for them at our school.

The free/reduced meals application will be available on the Highlands Charter Academy's website and in the school office. The Administrative Assistant will be available to families to help them complete this application upon acceptance in the lottery as part of their enrollment package.

There is a line item in the operations budget of \$54,000 for the first year to provide for this expense. This amount is based on an estimated cost of \$6.00 per student for 185 days for 30% of the student body. We anticipate this line item growing annually and have budgeted just under \$130,000 in year five to support these programs.

Because students may forget their lunches, we will also maintain a small food pantry. This pantry is not intended as a regular food source for students who are financially unable to provide their lunch. As noted, we will contract with a local catering company to regularly provide lunch for students. This food pantry, however, will serve those students who simply have forgotten their lunch on any given



day.

Additionally, families will report any food allergies or religious food restrictions in their enrollment paperwork, and HCA will be diligent in providing alternative options to meet those needs.

11.3. Civil Liability and Insurance


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

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

Q190. Complete the attached table, indicating the amount of each type of coverage as outlined in a quote obtained from an insurance provider.

Upload Required File Type: excel Max File Size: 30 Total Files Count: 10

Resources


Insurance Coverage ...

Applicant Evidence :


Insurance Coverage ...

Uploaded on **4/21/2023**
by **Karen Manning**

Q191. Attach Appendix L: Insurance Quotes

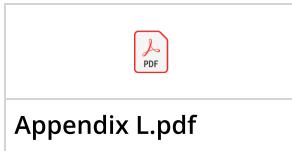


- The applicant must provide a quote from an insurance provider as part of this application (as Appendix L) to demonstrate the levels of insurance coverage and projected cost.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

Total Files Count: 5

Applicant Evidence :



Uploaded on **4/21/2023**
by **Karen Manning**

11.4. Health and Safety Requirements

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

Q192. We, the Board members will develop a written safety plan and policies to be shared with staff, parents, and students and be available upon inspection from the Department of Public Instruction and local Health Departments. **The Board Chair must sign this question.**

Signature

11.5. Start-Up Plan



Q193. Provide a detailed start-up plan for the proposed school, specifying tasks, timelines, and responsible individuals (including compensation for those individuals, if applicable).



Highlands Charter Academy will follow the most current Ready-to-Open Framework for North Carolina Charter Schools checklist. We will use the checklist to assist in developing the instructional program, reach out to potential students, secure facilities, create appropriate financial management and governance policies, and ensure compliance with all laws.

The Board will attend all required Planning Year training and hold regularly scheduled monthly meetings.

A few of the significant tasks that Highlands Charter Academy Board members will carry out during the start-up process involve facility acquisition and preparation, fundraising and grant writing, hiring of a Headmaster, board training and development, marketing, community relations, policy development, handbook development, and process and procedures development.

Committees will be formed to accomplish particular tasks to meet criteria and metrics. The committees will include but are not limited to: Finance, Governance, Academics, Facilities, and Marketing.

Finance

The Finance Committee will create all budgets. It will work with DPI to use CCIP for grants and ensure the school meets all federal funding requirements. HCA will also engage an auditing firm to ensure compliance and reconciliations of all financial records. The Committee will maintain all Funding Documentation and ensure all required documentation is on file and that Funding is prepared to flow from the State to the school. It will verify that enrollment is sufficient to allow for financial viability and programmatic integrity.

Governance

The Governance Committee will work to provide the staff and families with a Student Handbook. This Committee will also be responsible for the Transportation Plan, Lunch Program, School Safety, and Policies. This Committee will also work with DPI for all board training to ensure compliance.

Academics

The Academic Committee's responsibilities will revolve around the curriculum, the school calendar, teacher professional development, onboarding personnel, and Exceptional Children. This Committee will make sure Student Accountability Plans are approved and prepared to be carried out by assigned staff.

Facilities

The Facilities Committee will verify all contracts for facilities are in order and properly executed and signed. If there is to be renovation or construction, it is on target and completed at least two weeks



before the first day of school. The Committee is responsible for the Certificate of Occupancy for Education Purposes being on file in the Office of Charter Schools. They are responsible for a Contingency plan to be in place and ready to be executed in case the building is not ready to occupy by the first day of school. This Committee is to ensure all local inspections have been completed (fire, health, etc.).

Marketing/Admissions

Section 10.6 of this application covers all Marketing considerations for the school.

Q194. Describe what the board anticipates will be the challenges of starting a new school and how it expects to address these challenges. Submit a Start-up (Year 0) Budget as Appendix O, if applicable.



The HCA Founding Board realizes that starting a new charter school requires a lot of planning, hard work, and perseverance.

Fundraising

Because charter schools in NC receive much less funding than traditional public schools, The Highlands Charter Academy Board sees one of the early challenges will be to raise funds through private donations and grants. Citizens of Moore County are very philanthropic. The local community college has one of the largest endowments of all community colleges in the nation. Board Member Deborah Lawson has considerable experience and success in fundraising, helping to secure over \$6 million for a private school in Moore County. HCA has numerous volunteers ready to begin fundraising endeavors.

Facilities

Because charter schools must provide their facilities, finding a suitable building for the school is challenging. The Board is actively seeking a location to begin the school and to eventually move to a new or renovated facility that will house K-12.

School Culture

Setting the tone for the school culture during the first year of operations will be crucial for the subsequent years. HCA will demand of students decorum, manners, honor, and respect for adults and among fellow students. The Headmaster will be responsible for ensuring teachers are well-versed in strategies that will guarantee such is carried out.

Regulations

Because charter schools in NC are subject to even more regulations and requirements than traditional public schools as they relate to funding, budgeting, and reporting, ensuring compliance will be time-consuming and complex. Because Board Member Sharon Castelli has served as a Superintendent of one of NCs largest charter schools, HCA feels confident the school will be able to meet these challenges.

Community Support

Community support is crucial for a charter school to be successful. HCA will engage with parents, community leaders, and other stakeholders to build an understanding of the school's mission, vision, and goals.

Outreach

HCA desires to serve the residents in the northern section of Moore County, the lowest socio-



economic sector of the county. The challenge to penetrate these tight-knit communities and gaining their trust will be a challenge. The Board is rapidly making contact with influential people in these communities and feels they will successfully assist us in reaching these families. Board member Caleb Chriscoe is a lifelong resident of Robbins, where the Elementary school is the most poorly performing in the county. He will be instrumental in connecting with families in and around the town. Board Member Becky Graham once lived in the northwestern part of the county and is helping with communications with residents in that area.

11.6. Facility

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

Q195. What is your plan to obtain a building? Identify specific steps the board will take to acquire a facility and obtain the Educational Certificate of Occupancy. Present a timeline with reasonable assumptions for facility selection, requisition, state fire marshal and health inspections, and occupation.



Several members of the Board are actively talking to vacant building owners, the Carthage City Council, churches, and many others in the community to find a facility that will accommodate Highlands Charter Academy for the first two to three years. Board member Deb Lawson is a licensed Real Estate Agent and is actively working in this regard. Sharon Castelli is a charter school Superintendent and has been involved in several school facility search, building, and renovation projects.

We are currently seeking an initial facility that will allow for the anticipated needs for the first two or three years while investigating more sizable buildings we could renovate or land upon which a K-12 school can be built.

A Facility Committee will be formed and tasked to develop a detailed plan for a facility or land acquisition.

If a suitable facility is identified, the Facility Committee will work with a contractor to visit the site and create a detailed needs assessment to determine priority areas for improvements and updates, developing a timeline for all updates. If this building is determined to be ideal for growth to 12th grade or has land that will allow for expansion to such, a purchase agreement will be pursued. The Facility Committee will provide a timeline to the Board to ensure the facility is up to code so the school can have the required Certificate of Occupancy for Educational Use in August 2028.

If land (15-20 acres) is donated to the school or available for purchase, the Facilities Committee will work toward securing it and begin the process of building school structures. We hope to see the appropriate numbers of classrooms, offices, and other necessary rooms and areas ready for occupancy by June or July of 2027. Afterwards we will look at the addition of classrooms, offices, a gym, auditorium, cafeteria, library, offices, teacher's lounge, etc.

Q196. Describe the school's facility needs based on the educational program and projected enrollment, including: number of classrooms, square footage per classroom, classroom types, common areas, overall square footage, and amenities. Discuss both short-term and long-term facility plans. Demonstrate that the estimate included in your budget is reasonable.



We plan to locate a facility of 16,600 square feet or larger as we begin the search process in the summer of 2023.

For Year One, with two classes each for K-2, Highlands Charter Academy will need six classrooms. We will also plan for a classroom for EC students, making a total of seven classrooms needed. We desire each classroom (seven) to have at least 600 square footage and the EC classroom to have at least 300 square feet. This will be 4,500 sq ft for classrooms. HCA will also need at least two pairs of restrooms with multiple stalls and sinks. HCA will also need additional recreational/gym space for PE class, school assemblies, recess when the weather is not conducive to being outdoors, Family Nights, and special performances and events. Offices will also be needed for the Headmaster and a reception/office area for the Clerical personnel. The estimated footage for these areas is 5,500-7,500. The total square footage required for Year One is 10,000-12,000 sq ft.

For Year Two, we will add five classes (3,000 sq ft), bringing overall square footage to 13,000-15,000 sq ft.

By the end of Year Three, we hope to have a much larger facility purchased and renovated or built.

For our initial facility, we will plan for the eventuality that having a permanent facility may be delayed a year. This means we will need six additional classrooms for Year Three, bringing our facility needs to 16,600-18,600 sq ft.

Q197. Describe school facility needs, including: science labs, art room, computer labs, library/media center, performance/dance room, gymnasium and athletic facilities, auditorium, main office and satellite offices, workroom/copy room, supplies/storage, teacher workrooms, and other spaces.

In Year One, in addition to the seven classrooms, restrooms, and a recreation area, Highlands Charter Academy will need a facility that has space for one office for the Headmaster with reception space for the Administrative Assistant/Translator and one printer area/supply storage area.

HCA will also need recreational space for PE classes, school assemblies, recess when the weather is not conducive to being outdoors, Family Nights, and special performances and events. This area could be used as a cafeteria. Ideally, a space for a library would be useful.

Our goal is to acquire space that can allow us to grow through at least Year Three of operation (K-4), which would add four additional classrooms, one additional office, and at least one additional pair of multiple stall bathrooms. Ideally, we would also have rooms for Art and Music, but this is not a requirement. Those teachers can offer lessons in the classrooms if need be.

Q198. What is the breakdown of cost per square foot for the proposed facility? Outline



how this cost is comparable to the commercial and educational spaces for the proposed school location.

Cost per square foot can not be estimated at this time because a facility has yet to be secured, and it is impossible to determine due to the fluctuations in the real estate market in Moore County.

Q199. Facility Contingency Plan: Describe the method of finding a facility if the one the board has identified will not be ready by the time the public charter school will be opening. Include information regarding the immediate spatial needs of the school and identify any programs that will not be immediately offered because a permanent facility has yet to open.

A Highlands Charter Academy Board member, Deborah Lawson, is a licensed Real Estate Agent. She will be very instrumental in finding a facility for use if the original option does not materialize. She will constantly monitor the commercial real estate market in Carthage and the surrounding area.

We will also keep close contact with local churches as they have classrooms and open areas, and many have commercial kitchens and eating areas. Several have the potential to lease classroom space through our first few years.

We also have the option to rent used modular units (seven classrooms and one for offices) until we can purchase property and build a permanent facility. Land will be identified for such if this option is needed.

Q200. Describe the board's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

Board member Dr. Sharon Castelli has extensive experience and knowledge of facility acquisition and management. She has been a superintendent during the construction of new facilities in addition to leasing buildings, used modular units, and obtaining new modular units. Additionally, she has experience with working with Town Managers and obtaining general contractors with the responsibility of conducting physical needs assessments on commercial properties to evaluate the appraisal value and determine costs to upfit the property. During her tenure, Castelli was involved in acquiring a 45-million dollar bond for the construction of a new High School and Career Academy for an NC charter school. While in a rented facility, she worked with general contractors to expand classrooms to allow for growth while new construction was underway.

Board Member Deborah Lawson has been a Licensed Real Estate Agent since 1995. She has represented buyers and sellers for lots, acreage, single-family homes, horse farms, and commercial properties.



11.7. Certify

Q201. I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
- No

Q202. Explanation (optional):



12. Financial Plan

12.1. Charter School Budget

All budgets should balance indicating strong budgetary skills. Any negative fund balances will, more than likely, generate additional questions by those evaluating the application. If the applicant is depending on other funding sources or working capital to balance the operating budget, please provide documentation such as signed statements from donors, foundations, bank documents, etc., on the commitment of these funds. If these figures are loans, the repayment needs to be explained in the narrative and found within the budget projections.


Q203.If applicable, attach as Appendix M: Revenue Assurances. Assurances are needed to confirm the commitment of any additional sources of revenue.

Q204.Attach as Appendix N: Proposed Budget for Year 1 through Year 5 [Click here to access and download the Budget Template. \(https://www.dpi.nc.gov/copy-charter-application-budget-template-012023xlsx/download?attachment\)](https://www.dpi.nc.gov/copy-charter-application-budget-template-012023xlsx/download?attachment)

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

Total Files Count: 5

Applicant Evidence :


Appendix N-Propose...

Uploaded on **4/26/2023**

by **Karen Manning**

12.2. Budget Narrative

Please include additional information that explains the assumptions used in the 5-year budget.



Q205. How was the student enrollment number projected?

The Board enrollment projections for Highlands Charter Academy were made based on a number of factors. One of the overwhelming points has been the enormously positive response by the public for a classical charter school that will serve the underserved northern half of Moore County. There are no private or charter schools in this area. Because this part of the county has no option to the poorly performing public schools, support is overwhelming not only from those residing there but from other areas of the county who want to see children in this part of Moore County offered a better education. We expect full enrollment and a sizable waiting list each year.

Because of families moving to the area from other parts of the country, especially the northeast and California, and the steady growth of families coming here due to stationing at nearby Ft. Bragg/Liberty, Moore County's home developments are now being expanded into the central and northeastern sections. With the continued increasing influx of families to the county, we do not anticipate disrupting the enrollment of the public elementary schools in the central and northern portions of the county.

The HCA Board decided slow but steady growth to be ideal. We will begin rather small with two classes each of K-2 and add a class the following year to each and add grade three (two classes). We will then add a fourth class to K-2 and cap it at that. By Year Five, we will see four classes of K-5 and six classes of sixth grade.



Q206. Provide an explanation as to why you believe there is a demand for the school that will meet this enrollment projection.

In our conversations with people in the community for the past few years, we became convinced that there is a strong demand for a school like the one we intend to begin.

- There is no choice for schooling in the northern half of Moore County. All private and charter schools are in the southern half.
- The Interest Surveys on our website have garnered the contact information for 120 families as of April 21 and we are receiving contacts almost daily.
- Other than two private schools, there is no choice to the public high schools, which are very much overcrowded beyond what they were built to accommodate. The charter schools do not offer high school.
- The poor academic outcomes in northern Moore County have resulted in a widening of the achievement gaps.
- The classical education model is in high demand in Moore County. The private school that uses this model has an extensive waiting list each year.
- Parents are receptive to school uniforms.
- A school that offers a firm grounding in civic virtue, and cultivating moral character is very much desired.

Q207. Provide the break-even point of student enrollment.

The Year One break even point is 112 students.

Q208. Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.



If Highlands Charter Academy's anticipated revenues are not received or are lower than estimated, the school will look for areas where it can reduce expenses (supplies, equipment purchases, negotiating lower prices with vendors, etc.). The school will always seek ways to reduce costs without reducing the quality classical education HCA students receive.

HCA can investigate ways to increase its revenue. This may include fundraising activities such as bake sales, auctions, seeking donations from philanthropic organizations, or soliciting contributions from local businesses and individuals.

HCA can postpone non-essential expenditures until there are enough funds to cover them. Such may include delaying capital projects, postponing equipment purchases, or deferring maintenance and repair expenses.

To offset any revenues lower than estimated, HCA plans to pursue early on grants available to charter schools and foundations that historically support equitable education. We will strive to purchase classroom and office equipment from government surplus outlets.

Q209. Does the budget rely on sources of funds other than state, county, and federal (e.g., loans, donations, etc.)? If so, please provide the source and amount. Also, describe any committed contributions and in-kind donations of goods or services to be received by the charter school that will assist in evaluating the financial viability of the school. Clearly indicate between those grants or in-kind donations which have already been firmly committed and those the board is planning to pursue. Be sure that the appropriate assurances documentation is provided in the appendices.



Moore County citizens are very benevolent when it comes to education. Highlands Charter Academy will actively pursue donated funds with many fundraisers. Because of their generosity, Sandhills Community College can award over \$650,000 in scholarships each year and over \$350,000 for local high school graduates to attend the school annually. The College has one of the largest endowments of all US community colleges.

On our Board is an individual who led the Foundation for a private school and raised over \$6 million. She and a team of HCA volunteers are working toward several HCA fundraisers.

We plan to raise enough money to pay rent for our facility until state and local funding is realized. We foresee being able to raise funds to cover teacher bonuses, high-quality professional development opportunities, and other "wish-list" items. We will also begin applying for grants, as many of our members are familiar with this process. Additionally, we will seek in-kind donations as we begin our growth process.

If the Board cannot locate a facility that can be rented reasonably or raise funds as anticipated, the Board will look towards loans as needed and will work with the auditor in this process.

Q210. Provide the student to teacher ratio that the budget is built on.

The Year One budget is built on the student-to-teacher ratio of 1:18 for students in Kindergarten and First grade and 1:20 for second grade. This ratio does not include contracted enrichment teachers nor an EC teacher.

Q211. Describe the board's individual and collective qualifications and capacity for implementing the financial plan successfully.

Highlands Charter Academy has three solid Board members who can collectively guarantee the financial plan will be implemented successfully.

- Sharon Castelli is the Superintendent of Uwharrie Charter Academy, where she most recently has been responsible for a 45M growth project to build a new High School and Career Academy. She works on grants and all federal, state, and local finances, ensuring compliance and providing feedback on all spending and allocations of resources.
- Ariane Mestelle earned a Bachelor's degree in Finance and has years of experience in analytics, budgeting, compensation plans, accounting, forecasting, operational expense analysis and maintenance, financial closing and reporting, and supporting documentation.
- Becky Graham recently retired from Sandhills Community College as the Data Management Analyst where she compiled and analyzed data for internal use and federal reports.



Q212. Describe how one or more high needs students with disabilities might affect the budget and your plan to meet student needs that might be more than anticipated.

The Highlands Charter Academy Board is very committed to valuing and serving special needs students. Board member Dr. Beth Ann Pratte has many years of experience with expertise and experience with early childhood education in evidence-based literacy instruction, neurocognitive interventions/prevention, and developmentally appropriate pedagogy.

The Board realizes that one or more high-needs students could impact the budget. There will be reserves and unaccounted-for revenues for Title I and Federal EC monies that can provide revenue for unexpected high-needs students. There will also be Special State Reserve Funds, PRC 029, and grant money we can apply for. If necessary, the Board will also be prepared to seek reimbursements from Medicare for reimbursable services realizing this can be a long process.

Q213. If there is a plan to outsource any or all financial management areas such as payroll, benefits, audits, fundraising, accounting, etc., provide a statement on how the vendors will be selected and how the board will oversee their activities to ensure fidelity and compliance.

The school will outsource the financial management of benefits, payroll, accounting, and audits. The Board is in the process of researching financial firms with experience in charter school financial management. We are seeking a firm to contract with for the planning year and, if satisfied with their work, will extend their contract yearly. The firm will have a representative present a report at the monthly Board meetings or as needed.

Three estimates will be required for vendors if the amount of the item at hand is over \$5000. The Board will develop a Vendor Assessment form for the Headmaster to complete and present to the Board annually. The Headmaster will report any issues or concerns regarding vendor performance to the Board. Termination of any vendor must be subject to a vote of the Board.

During monthly Finance meetings, the Headmaster will review with the board its monthly Budget versus Actual (BBA) with reconciliations of purchases.

Q214. Does the school intend to contract for services such as student accounting and financial services, exceptional children instructional support, custodial, etc? Describe the criteria and procedures for the selection of contractors and large purchases.



Highlands Charter Academy will contract for outside services for financial, accounting matters, and for EC related services and/or content-specific interventionists; as per the Individualized Educational Plan dictates. If a food service plan does not materialize with the Moore County School System, such may be contracted.

A Request for Proposal (RFP) will be issued to evaluate service applicants. Ideally, three quotes will be received. All service contracts over \$10,000 must be approved by the Board.

Purchases over \$5,000 will require signatures from at least two Board members.

Q215. Explain how the budget aligns with the school's mission, curricular offerings, transportation plans, and facility needs.



Budget Alignment with Mission

Budget decisions are at the forefront of Highlands Charter Academy's mission. Recruiting and retaining a highly capable Headmaster and outstanding, dedicated teachers will be the key to cultivating lifelong intellectual curiosity in its students. Both the Headmaster and all HCA teachers will have a solid understanding of classical education, a dedication to the liberal arts and the teaching of civics, and a strong capacity for organizational leadership. To support our Headmaster and teachers and create a culture of learning that will help retain them, a large percentage of our budget will go to salaries.

As we begin, the first few years will have one teacher per classroom, a Headmaster, and an Office Assistant. We will depend on parent and community volunteers to fill in gaps. We will contract out for services such as accounting, custodial, and enrichment teachers. We will not offer the NC State retirement plan the first few years and plan to add that as a benefit in year three or four.

In order to attract and retain teachers, we will pay HCA teachers according to the pay scale and offer the same benefits that the Moore County Schools pay and offer.

Budget Alignment with Curricular Offerings

We believe in the power of the teacher-student relationship in learning; children learn with paper, pencils, and real books. There will be minimal computer or tablet usage, leading to sizable savings other schools do not experience.

Budget Alignment with Transportation Plans

The socioeconomic status of many families will necessitate HCA provide transportation for students. Such plans have been taken into consideration in the budget.

Budget Alignment with Facility Needs

The Founding Committee is currently seeking a facility. Our budget estimates are provided elsewhere in this application.

Q216. What percentage of expenditures will be the school's goal for a general fund balance? Describe how the school will develop the fund balance.



Highlands Charter Academy will diligently create a balanced budget and operate with financial efficiency and solvency. The goal of Highlands Charter Academy is to have at least 5% of our base budget carry over each year. Total enrollment will see us at 6.1% carryover. Because local funds have the flexibility to carryover across fiscal years, the money will be set aside for incidentals.

The HCA Board plans to embark on aggressive fundraising campaigns, grant applications, and will solicit local and national foundations to increase our start-up and annual budget. A goal of \$300,000 has been set as a reserve fund by year five (2030).

Q217. Provide a description of proposed financing structure. Include financing of facilities, other asset financing, and leases.

The Board is currently seeking a facility for the school in the Carthage area. Board Member Deborah Lawson is a local Realtor and is actively involved in the search.

Our first approach for a facility is to seek a donated structure for the first two or three years of operations and seek to obtain 15-20 acres of land donation or an existing facility. If such is not achieved, a purchase will be made with donated funds.

We will hold fundraisers to raise money that will cover the first several year's lease payments and to purchase land and build (Deborah has raised over \$6 Million in fundraising efforts in the past several years).

Q218. Will the school have assets from other sources (e.g. building, furniture, chairs, computers, etc.)? If yes, please provide a list. Note which are secured and which are anticipated, and include evidence of commitment for any assets on which the school's core operation depends.

As of the submission of this application, Highlands Charter Academy does not have assets from another source. Such will be actively sought.

12.3. Financial Compliance

Q219. How will the school ensure adequate internal controls, including segregation of duties, safeguarding of assets, accurate and adequate record keeping?



Highlands Charter Academy Board will work with a finance provider, auditor, and lawyer to develop specific and enforceable internal control policies and procedures necessary to safeguard assets and keep accurate records.

Internal controls will include key elements in the National Resource Center's Finance and Governance Toolkit. These will consist of policies that allow for proper segregation of duties, provide exact procedures for approving significant acquisitions, surveying facilities and equipment for maintenance and repairs, observe record retention requirements, execute property management controls, safeguard data from theft or destruction, and adhering to all state mandates regarding accounting practices.

Q220. Provide any known or possible related party transactions (relationship, description of transaction, and estimated dollars involved).

No known or possible related party transactions exist at this time.

Q221. Provide the name of the firm approved by the NC Local Government Commission (LGC) that will conduct the audit. Include the complete mailing address, telephone number, and fax number. If a firm has yet to be identified, please list the firms the board has investigated.

Jay E. Sharpe, CPA, CFE

Certified Public Accountant, Audit Partner

Sharpe Patel PLLC

5510 Six Forks Road, Suite 140

Raleigh, NC 27609

919-961-7496

jay@sharpepatelcpa.com (<http://jay@sharpepatelcpa.com/>)

Applicant Comments :

Attached is the verification that this Auditor has reviewed with all members of the Board all items required for an annual audit and 990 preparations.



Applicant Evidence :



Audit Review.pdf

Uploaded on **4/27/2023**
by **Karen Manning**

12.4. Certify

Q222. I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
- No

Q223. Explanation (optional):




13. Other Forms


Q224. Sign the attached Charter School Required Signature Certification document and upload it as a PDF or image file.

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

Resources


Charter School Requ...

Applicant Evidence :


Required Signature ...

Uploaded on **4/24/2023**
by **Karen Manning**



14. Third-party Application Preparation

Q225. Was this application prepared with the assistance of a third-party person or group?

- Yes
- No



15. Application Fee

Pursuant to G.S. 115C-218.1(c) the charter school applicant must submit a \$1000 application fee to the Office of Charter Schools. The applicant must submit their application fee by **April 28, 2023, at 5:00 pm EDT** for Fast Track and Accelerated applications, and **April 28, 2023, at 5:00 pm EDT** for traditional timeline applications. Payments will be accepted in the form of a certified check. Cash is not accepted.


Q228.*Application Note: The applicant must mail the certified check along with the Application Fee Payment Form (see the resources for this question) before or on the due date of April 28, 2023, at 5:00 pm EDT for Fast Track and Accelerated applicants, and April 28, 2023, at 5:00 pm EDT for traditional timeline applicants. Failure to submit payment by the stipulated timeline to the Office of Charter Schools will deem the application incomplete. Payments should be made payable to the North Carolina Department of Public Instruction: North Carolina Department of Public Instruction Office of Charter Schools 6307 Mail Service Center Raleigh, NC 27699-6307

I understand

Applicant Comments :

The USPS confirmed that the mailed Certified Check was signed for on Tuesday, April 25, 2023.

Resources


2023 Payment Form ...



16. Signature page

Q229. Fill out the attached resource and get it signed and notarized. Then upload as a PDF or image file.

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

Resources



Applicant Evidence :



Uploaded on **4/28/2023**
by **Caroline Kelly**

Q230. Please digitally sign your application here
Signature



Final Status



Reject Approve

Approver Comments

Appendix A: Evidence of Community/Parent Support.

Public Survey

Highlands Charter Academy launched a website in January of 2023 and, to ensure that the school is desired and supported, an “Expression of Interest” form was placed on the home page. As of noon on April 26, 2023, with promotions only just beginning, 131 families have provided contact information and forms are being submitted daily, some days as many as 6-7. Several have multiple children they’d be interested in enrolling. As we begin to market the school more heavily with flyers posted throughout the community, the distribution of QR code cards and brochures, social media posts and paid ads, google AdWords advertising, press releases, etc., we expect that we will see an uptick in Interest Form submissions.

EN



Highlands Academy
Moore County
Public Charter School

[Donations](#)

[Home](#) [Classical Education](#) [Curriculum](#) [Admissions](#) [Teachers](#) [Location](#)

EXPRESSION OF INTEREST

We will rely on community and parent partnerships to ensure Highlands Charter Academy is both desired and supported. Please complete the short form below to help us plan for the interest level of Moore County. Your submission is confidential and non-binding – we will not share your information.

This information helps us ensure you only receive information appropriate for your level of interest. We will not share your information and you can opt out of receiving additional communication at any time.

I am interested in enrolling my child at Highlands Charter Academy.

I may be interested in teaching at Highlands Charter Academy.

I am able to volunteer.

First Name *

Last Name *

Phone *

Email *

Address *

Zip Code *

If you are interested in enrolling your child/children in Highlands Academy, what grade(s) will they be entering in August of 2025.

Comments (we'd love to know your thoughts about such a school in our area.)

Public Meetings

March 23, 2023 Seven Lakes Community Gathering (in addition to residents, a County Commissioner and three School Board members were present.) Board members made a presentation, answered questions, and left brochures with the crowd.

May 15, 2023 Carthage Town Council
Presentation to the Council about the need for the school, explanation of the educational model, status of the property search, etc.

May 16, 2023 Moore County Commissioners
Presentation to the Council about the need for the school, explanation of the educational model, status of the property search, etc.

We plan to present to Rotary Clubs and other community and professional organizations, groups at churches, and any gatherings we deem valuable to generating interest in HCA. We will set up information tables at public events such as lectures, street fairs, and music events to talk with families and garner contact information from those interested in enrolling their children.

Community Events

Grace in the Park in Robbins, NC
Saturday, April 8, 2023

Board members talked to parents at this event and obtained contact information from those interested in enrolling their children at HCA. This event was offered to the lower socioeconomically families in Robbins where toys and clothing were given away and lunch was provided.

Carthage Buggy Festival in Carthage, NC
Saturday, May 13, 2023

The Buggy Festival is held annually to commemorate the famous Tyson and Jones Buggy Factory that, from the mid-1800's to the 1920's, produced the carriages that were essential to life in rural North Carolina. We had an exhibit near the children's play area and talked to parents, gave out brochures, and achieved Interest Forms.



Year at a Glance K-12

2ND GRADE - YEAR AT A GLANCE

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY
LITERACY Literacy Essentials	Weeks 1-2 Review McCall Crabb List 2A Begin Uncontrolled Readers	Lists 2B & 2C	Lists 2D & 2E	Lists 2F & 2G	List 2H	Lists 2I & 2J	Lists 2K & 2L	Lists 2M & 2N	List 2O
LITERATURE Include ~2 poems each month	Charlotte's Web	Magic Paintbrush Fisherman and His Wife Beauty and the Beast	Greek Mythology	Tongue-Cut Sparrow Christmas Carol How the Camel Got His Hump	Peter Pan	Iktomi Stories Tall Tales Talk	Sign of the Beaver	Emperor's New Clothes	El Pajaro Cu Tiger, Brahman, & Jackal
HISTORY & GEOGRAPHY	Basic Geography and Maps Ancient India	Ancient China Modern Japan	Ancient Greece	Ancient Greece	Constitution War of 1812	Geography of the Americas Westward Expansion	Civil War	Civil War	Immigration and Citizenship
MATH Dimensions 2A & 2B	Chapters 1-2 Begin 2A	Chapters 3-4	Chapters 5-6	Chapter 7	Chapter 8 Begin 2B	Chapters 9-10	Chapters 11-12	Chapters 13-14	Chapter 15
SCIENCE	Seasons and Water Cycle Life Cycles	Insects	Insects Jean-Henri Fabre	Magnetism	Simple Machines Elijah McCoy	Cells and Microscopes Daniel Hale Williams Anton van Leeuwenhoek	Cells & Microscopes Taking Care of Your Body Florence Nightingale	Digestive and Excretory Systems	Plants *Review content from Kindergarten for this unit.
ART	Lines	Architecture	Architecture	Sculpture	Landscapes	Landscapes	Abstract Art	Abstract Art	
MUSIC Include 2 songs each month	Basic Elements	String Instruments Carnival of the Animals	Percussion Instruments Toccata	Keyboard Instruments	Bach	Beethoven	Mozart	Notation	Review notation and elements

3RD GRADE - YEAR AT A GLANCE

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY
LITERACY Literacy Essentials	Weeks 1-2 Review Lists for Weeks 1-4	Lists for weeks 5-8	List for weeks 9-12	Lists for weeks 13-16	Lists for weeks 17-20	List for weeks 21-24	List for weeks 25-28	List for weeks 29-32	List for weeks 33-36
LITERATURE Include ~2 poems each month	Arabian Nights Black Beauty	Black Beauty Greek and Roman Mythology	Norse Mythology The Princess and the Goblin	The Princess and the Goblin	The Hunting of the Great Bear Farmer Boy	Farmer Boy	Gone is Gone The People Could Fly	Three Words of Wisdom William Tell The Little Match Girl	The Jungle Book
GRAMMAR Well-Ordered Language 1A & 1B	Parts of Speech Kinds of Sentences	Principal Elements Adverbs	Adjectives Direct Objects	Subject Pronouns Interrogative Sentences	Object Pronouns Pronoun Review	Prepositional Phrases-Adverbial Introductory Prepositional Phrases	Compound Subjects Compound Verbs	Compound Verbs Compound Direct Objects	Punctuation & Review
COMPOSITION	Parts of a Paragraph	Informative Paragraph	Informative Paragraph	Informative Paragraph	Narrative Paragraph	Narrative Paragraph	Persuasive Paragraph	Persuasive Paragraph	Review and Remediation
HISTORY & GEOGRAPHY	Rivers of the World Ancient Rome	Ancient Rome	Ancient Rome	Vikings Canadian Geography	Native Peoples of North America	Exploration	Southern Colonies	New England Colonies	Middle Atlantic Colonies
MATH Dimensions 3A & 3B	Chapters 1-2 Begin 3A	Chapters 3-5	Chapters 6-7	Chapters 8	Chapters 9-10 Begin 3B	Chapters 11-12	Chapters 13-14	Chapters 15-16	Chapters 17
SCIENCE	Classification of Animals	Ecology John Muir	Astronomy Mae Jemison	Astronomy E. Halley Copernicus	Human Body: Muscular & Skeletal Systems	Human Body: Nervous System, Vision & the Eye	Light & Optics	Human Body: Hearing & the Ear	Sound A.G.Bell
ART	Balance and Symmetry	Ancient Rome	Ancient Rome	Byzantium	American Indian Art	Light	Space	Design	Design
MUSIC Include 2 songs each month	Elements Orchestra Review	Scheherzade Prelude	The planets	Tchaikovsky	Native American Music William Tell	Souza & Copland	Gershwin, Cohan, & Bernstein	Notation	Review notation and elements

4TH GRADE - YEAR AT A GLANCE

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY
LITERACY	Intro of Roots 3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week
LITERATURE *Include 1-2 poems each month	Wonderful Chuang Brocade Treasure Island	Treasure Island King Arthur	King Arthur Saint George & the Dragon Robin Hood	Robin Hood Fire on the Mountain	Johnny Tremain	Johnny Tremain	Anne of Green Gables	Anne of Green Gables	Rip Van Winkle Sleepy Hollow
GRAMMAR Well-Ordered Language 2A & 2B	Principal Elements Diagramming Adverbs	Adverbs Adjectives	Predicate Verbs Direct Objects Predicate Nominative	Predicate Adjectives Predicate Review Possessive Nouns	Prepositional Phrases Compound Elements	Subject Pronouns Object Pronouns	Possessive Pronouns Interrogative Pronouns	Compound Sentences	Relative Pronouns Relative Clauses
COMPOSITION	Parts of an Essay	Informative Essay	Informative Essay	Informative Essay	Narrative Essay	Narrative Essay	Persuasive Essay	Persuasive Essay	Review & Remediation
HISTORY & GEOGRAPHY	Mountains China Europe in the Middle Ages	Europe in the Middle Ages	Islam Crusades	Early & Medieval African Kingdoms	American Revolution	Making a Constitutional Government	Washington Adams Jefferson	Jeffersonian America	Andrew Jackson
MATH Dimensions 4A & 4B	Chapters 1-5 Begin 4A	Chapters 5-7	Chapters 7-8	Chapters 9	Chapters 10 Begin 4B	Chapters 11-12	Chapters 13-14	Chapters 15-16	Chapter 17
SCIENCE	Circulatory & Respiratory Systems Charles Drew Elizabeth Blackwell	Geology James Hutton	Geology	Geology	Meteorology Benjamin Banneker	Meteorology	Chemistry	Chemistry Electricity Michael Faraday	Electricity
ART	Ancient China	Medieval Europe	Islamic Art and Architecture	Africa	Late 18th-century United States	Late 18th-century United States	Monticello	Georgian Architecture	
MUSIC	Orchestra Review 2 songs	Keyboard instruments 2 songs	Music of the Middle Ages 2 songs	Music of the Middle Ages 1 song	Vocal Ranges Elements	Elements Notation	W. A. Mozart Haydn 2 Songs	Handel 1 song	Review Notation, elements, ranges

5TH GRADE - YEAR AT A GLANCE

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY
LITERACY	Root words review 3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week	3 roots & 10 spelling/vocab words per week
LITERATURE *Include 1-2 poems each month	Secret Garden	Secret Garden Tales from Shakespeare	Wind in the Willows	Wind in the Willows The Samurai's Daughter	Adventures of Tom Sawyer	Adventures of Tom Sawyer Frederick Douglass	Frederick Douglass	Alice in Wonderland	Sherlock Holmes Coyote Goes to the Land of the Dead The Sun Dance
GRAMMAR Well-Ordered Language 3A & 3B	Four Kinds of Sentences Adverbs & Adjectives	Predicate Verbs, Nominatives & Adjectives Personal Pronouns	Sensory Linking Verbs Prepositional Phrases	Indirect Objects	Interrogative Pronouns Relative Clauses	Adverbial Elements Adverbial Clauses	Reflexive Pronouns Participles	Gerunds Infinitives Review Verbals	Types of Sentences
COMPOSITION	Informative 4 Paragraph Essay	Informative 4 Paragraph Essay	Informative 4 Paragraph Essay	Narrative 4 Paragraph Essay	Narrative 4 Paragraph Essay	Narrative 4 Paragraph Essay	Persuasive 4 Paragraph Essay	Persuasive 4 Paragraph Essay	Persuasive 4 Paragraph Essay
HISTORY & GEOGRAPHY	Lakes Renaissance	Early American Civilizations European Exploration	Reformation England from Henry VIII to William & Mary	Russia Feudal Japan	Antebellum America	Civil War	Civil War	Reconstruction	Westward Expansion after 1860 Native Americans
MATH Dimensions 5A & 5B	Chapters 1-4 Begin 5A	Chapters 4-6	Chapters 6-7	Chapter 8	Chapters 9 Begin 5B	Chapters 9-11	Chapters 11-13	Chapters 13-14	Chapter 15
SCIENCE	Plant Structures and Processes	Plant Structures and Processes Classification	Classification Carl Linnaeus	Cell Structures and Processes Ernest Just	Cell Structures and Processes	Life Cycles and Reproduction Percy Lavon Julian	Endocrine System Reproductive System	Atomic Structure & Periodic Table John Dalton	Elements, Compounds, & Chemical Change
ART	Renaissance Art	Renaissance Art/ Sculpture	Renaissance Art/ Sculpture	Art of Japan	19th-Century American Art	19th-Century American Art	19th-Century American Art	19th-Century American Art	
MUSIC	Orchestra Elements	Renaissance Music	Renaissance: Dona Nobis Pacem	Songs: Sakura and Hava Nagilah Beethoven	Mussorgsky	Music of the Civil War	Spirituals	Notation	Notation

6TH GRADE - YEAR AT A GLANCE

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY
LITERATURE <small>*Include 1-2 poems each month</small>	Classical Mythology	Children's Homer	Children's Homer Prince and the Pauper	Prince and the Pauper	Scarlet Pimpernel	Scarlet Pimpernel	Count of Monte Cristo	Count of Monte Cristo	Count of Monte Cristo
GRAMMAR Well-Ordered Language 4A & 4B	Principal Elements, Adverbs & Adjectives Predicate Verbs, Predicate Nominatives, and Predicate Adjectives	Prepositional Phrases Personal Pronouns	Indirect Objects Interrogative Pronouns and Interrogative Adverbs	Relative Clauses with Relative Pronouns and Relative Adverbs Appositives	Reflexive Pronouns & Intensive Pronouns	Adverbial Causes & Phrases Indefinite Pronouns	Participial Phrases Gerund Phrases	Infinitive Phrases Verbal Phrase Review	Noun Clauses
COMPOSITION	Parts of an Essay	Informative Essay	Informative Essay	Informative Essay	Narrative Essay	Narrative Essay	Persuasive Essay	Persuasive Essay	Review and Remediation
HISTORY & GEOGRAPHY	Deserts Judaism & Christianity	Ancient Greece	Ancient Rome	Ancient Rome Enlightenment	French Revolution	Romanticism Industrialism	Capitalism & Socialism	Immigration Industrialization & Urbanization	Reformers Latin America
MATH Dimensions 6A & 6B	Chapters 1-2 Begin 6A	Chapters 2-3	Chapters 4-5	Chapters 6-7	Chapter 8 Begin 6B	Chapters 11-12	Chapters 12-13	Chapter 9	Chapter 10
SCIENCE	Plate Tectonics Alfred Wegener	Energy Marie Curie	Heat & Heat Transfer	Energy Transfer Lewis Latimer James P. Joule	Astronomy Isaac Newton	Human Body: Circulatory & Lymphatic Systems	Immune System & Diseases Alexander Fleming	Oceans	Oceans
ART	Classical	Gothic	Renaissance	Baroque	Rococo	Neoclassical	Romantic	Realism	
MUSIC	Orchestra Elements	Elements	Baroque Vivaldi	Handel & Bach	Classical: Haydn & Mozart	Classical: Rossini Beethoven	Early Romantic: Schubert Beethoven	Schubert	Notation & Theory
LATIN Wheelock's	Introduction Chapter 1	Chapter 1	Chapter 2	Chapter 3	Chapter 4	Chapter 5	Chapter 6	Chapter 7	Chapter 8



7TH GRADE - YEAR AT A GLANCE

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY
LITERATURE	Fahrenheit 451	Fahrenheit 451 Cyrano de Bergerac	Cyrano de Bergerac Christmas Carol	Christmas Carol	Call of the Wild	Call of the Wild	Romeo & Juliet	Romeo & Juliet Short Stories	Dr. Jekyll & Mr. Hyde
GRAMMAR Get Smart	Principal Elements of the Sentence Lessons 1-4	Pronouns Adjectives Lessons 5-8	Adverbs Prepositional Phrases Transitive Verbs Lessons 9-12	Coordinating Conjunctions Lessons 13-17	Indirect Objects Intransitive Verbs Passive Verbs Lessons 18-21	Linking Verbs Noun Jobs Clauses Lessons 22-26	Clauses Lessons 27-30	Gerunds Participles Lessons 31-34	Infinitives Review Lessons 35-37
HISTORY & GEOGRAPHY	Exploration and Colonization	American Revolution	U.S. Constitution	U.S. Constitution	Early Republic	Antebellum Era	Abraham Lincoln	Civil War	Civil War and Reconstruction
MATH Dimensions 7A & 7B	Chapters 1-2 Begin 7A	Chapters 3-4	Chapters 5-6	Chapters 7-8	Chapters 9-10 Begin 7B	Chapters 11-12	Chapters 13-14	Chapters 15-16	Chapter 17 and Review
SCIENCE	Review Scientific Method Atomic Structure Niels Bohr Dmitri Mendeleev	Atomic Structure Antoine Lavoisier	Chemical Bonds and Reactions Lise Meitner	Chemical Bonds and Reactions	Chemistry of Food and Respiration	Chemistry of Food and Respiration Dorothy Hodgkin	Cell Division and Genetics	Cell Division and Genetics Gregor Mendel History of Earth and Life Forms	Evolution Charles Darwin
ART	Impressionism	Impressionism	Post-Impressionism	Post-Impressionism	Art Nouveau	Expressionism & Abstraction	Expressionism & Abstraction	Modern American Painting	Modern American Painting
MUSIC	Elements: Orchestra	Elements: Orchestra	Beethoven Pagagini Chopin	Romantic: Schuman Brahms & Liszt	Romantic: Berlioz Vergj	Romantic: Wagner	Nationalism: Grieg & Tchaikovsky Dvorak	Blues & Jazz Ragtime	Jazz & Fusion
LATIN Wheelock's	Review	Chapter 9	Chapter 10	Chapter 11	Chapter 12	Chapter 13	Chapter 14	Chapters 15-16	Chapter 17

8TH GRADE - YEAR AT A GLANCE

	AUGUST & SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY
LITERATURE	To Kill a Mockingbird	To Kill a Mockingbird	Lord of the Flies	Lord of the Flies	Robinson Crusoe	Robinson Crusoe	Short Stories Much Ado About Nothing	Much Ado About Nothing	Poetry
GRAMMAR Stay Smart	Review: Parts of Speech Phrases	Review: Clauses Verbals	Diagramming Sentences 1-27	Diagramming Sentences 28-55	Diagramming Sentences 56-83	Diagramming Sentences 84-111	Diagramming Sentences 112-139	Diagramming Sentences 140-167	Diagramming Sentences 168-188
HISTORY & GEOGRAPHY	The Gilded Age Progressivism Toward the Great War	World War I The Roaring Twenties	The Great Depression Rise of Totalitarianism World War II	World War II	The Start of the Cold War	Cultural changes and Activism The 1960s	The 1960s The 1970s	The 1980s The 1990s	The 2000s The 2010s
MATH Weeks & Adkins	Chapters 1-2	Chapters 3-4	Chapters 5-6	Chapter 7	Chapter 8	Chapter 9-10	Chapters 11-12	Chapters 13-14	Review
SCIENCE	Review scientific method and metric system Motion	Forces	Density and Buoyancy	Work, Energy, Power Albert Einstein	Work, Energy, Power Sound	Sound Electromagnetic Radiation and Light	Light Charles Steinmetz	Electricity Nikola Tesla Benjamin Franklin	Magnetism James Maxwell
ART	Painting since WWII	Painting since WWII	Photography	Photography	20th Century Sculpture	20th Century Sculpture	Architecture since the Industrial Revolution	Architecture since the Industrial Revolution	Review
MUSIC	Music Theory Review: Rhythm & Melody Orchestra	Nationalism: Sibelius & Bartok	Nationalism: Rodrigo & Ravel	Nationalism: Vaughn Williams Copland	Moderns: Debussy & Stravinsky	Musical Theater: Gilbert & Sullivan Vaudeville Revue	Musical Theater: Gershwin, Berlin, Cohan	Musical Theater: Porter, Kern Rogers & Hammerstein	Musical Theater: Bernstein & Sondheim
LATIN Wheelock's	Review Chapter 18	Chapters 19-20	Chapter 21	Chapter 22	Chapter 23	Chapter 24	Chapter 25	Chapter 26	Chapter 27

9TH GRADE OVERVIEW

NEWER SCHOOLS: COMPOSITION

1. Grammar Review
2. Writing and Editing Process

ESTABLISHED SCHOOLS: FORMAL LOGIC

1. Introduction to Formal Logic
2. Advanced Formal Logic

RHETORIC

1. Areas of Concentration
2. Suggested Speeches

ANCIENT LITERATURE

HISTORY: ANCIENT WORLD TO A.D. 500

1. Mesopotamia & the Mediterranean
2. The Hebrews
3. Archaic Greece
4. Persian Wars
5. Classical Greece
6. Peloponnesian War
7. Greek Philosophy
8. Alexander the Great & Rise of Macedon
9. The Hellenistic Period
10. Roman Regal Period
11. Roman Republic
12. Roman Civil Wars
13. Christianity & the Early Church
14. Roman Empire
15. Crisis & Division in Rome
16. Constantine & Christian Rome

MATHEMATICS - GEOMETRY

1. Basic Ideas of Geometry
2. Lines & Angles as Numerical Quantities
3. Proof
4. Triangles
5. Constructions
6. Perpendicular Lines & Planes
7. Parallel Lines
8. Polygons & Angle Relationships
9. Quadrilaterals
10. Parallel Lines & Planes
11. Further Study of the Triangle
12. Inequalities
13. Ratio & Proportion
14. Similar Figures

15. Areas & Volumes
16. Using Coordinates in Geometry
17. Geometry of the Circle
18. Measurements in a Circle
19. Geometry on the Surface of a Sphere

SCIENCE - BIOLOGY

1. Scientific Method & the Science of Biology
2. Cell Structure & Function
3. Genetics
4. Evolution and Classification
5. Microorganisms, Fungi, Plants
6. Animals
7. Human Body
8. Ecology

PHYSICAL EDUCATION

1. Outline of Topics

LATIN III

1. Review from Latin II
2. Unit XXVIII
3. Unit XXIX
4. Unit XXX
5. Unit XXXI
6. Unit XXXII
7. Unit XXXIII
8. Unit XXXIV
9. Eclectic Concepts

10TH GRADE OVERVIEW

BRITISH LITERATURE

HISTORY: EUROPE 500-1815

1. Early Middle Ages: c. 500-1000
2. High Middle Ages: c. 1000-1300
3. Late Middle Ages: c. 1300-1450
4. The Renaissance
5. The Reformation
6. Age of Exploration
7. Late 16th Century
8. The Scientific Revolution
9. 17th Century
10. The Enlightenment in Thought
11. 18th Century
12. The French Revolution
13. Napoleon

INTRODUCTION TO MORAL PHILOSOPHY

1. Koestler's *Darkness at Noon*
2. Orwell's *1984*
3. Huxley's *Brave New World*
4. Swift's *Gulliver's Travels*
5. Lewis's *Abolition of Man*

ECONOMICS

1. Principles of Economics
2. Supply & Demand
3. Profit & the Price System
4. Supply & Demand
5. Macroeconomic Theory
6. Money and the Role of Government
7. Business Cycles

MATHEMATICS - ALGEBRA II

1. Rational Numbers
2. Equations & Inequalities
3. Systems of Linear Equations
4. Factored Forms
5. Fractions
6. Quadratic Equations with Rational Roots
7. Formulas
8. Irrational Numbers
9. Functions, Graphs & Variation
10. Exponents & Logarithms
11. Elements of Coordinate Geometry
12. Quadratic Functions

13. Polynomials
14. Equations of the Second Degree; Circles
15. Sequences & Series

SCIENCE - CHEMISTRY

1. Review of Basic Chemistry Terms
2. Review of Measurements & Calculations
3. Atoms
4. Atomic Models & Electron Configuration
5. The Periodic Law
6. States of Matter
7. Gases
8. Solutions
9. Acids & Bases
10. Reaction Energy
11. Reaction Kinetics
12. Chemical Equilibrium
13. Oxidation-Reduction Reactions
14. Electrochemistry

ELECTIVE: FOREIGN LANGUAGE

ELECTIVE: LATIN IV

11TH GRADE OVERVIEW

AMERICAN LITERATURE

HISTORY: AMERICA 1607-PRESENT DAY

1. Colonial America
2. The American Revolution
3. The Articles of Confederation and the Ratification of the Constitution
4. The Early Republic
5. The Era of Good Feelings
6. Crisis of the House Divided: The 1850s
7. The Civil War
8. Reconstruction Era
9. The Gilded Age
10. Progressivism
11. World War I: "The Great War"
12. The Roaring Twenties
13. The Great Depression and the New Deal
14. World War II
15. Postwar America
16. Cultural Changes & Activism
17. The 60s and the 70s
18. The 80s and 90s
19. 21st Century America

MORAL PHILOSOPHY

1. Aristotle's *Physics*
2. Aristotle's *Ethics*
3. Aristotle's *Politics*
4. Machiavelli and Modernity
5. Hobbes and the Enlightenment
6. Locke and Liberalism
7. Rousseau and Romanticism
8. Freedom, Progressivism, and Socialism

TRIGONOMETRY & PRE-CALCULUS

1. Functions & Graphs Review
2. Linear & Quadratic Functions
3. Polynomial & Rational Functions
4. Exponential & Logarithmic Functions
5. Trigonometry/Ratios of a Triangle
6. Relations Among Trigonometric Ratios
7. Angles, Rotations & Radians
8. Trig Identities
9. Graphs of Trig Functions
10. Inverse Functions & Trigonometric Equations
11. Systems of Equations & Inequalities
12. Sequences & Series
13. Counting & Probability
14. Preview of Calculus

SCIENCE - PHYSICS

1. Introduction: Motion in One Dimension
2. Two-Dimensional Motion & Vectors
3. Forces & the Laws of Motion
4. Work & Energy
5. Momentum & Collisions
6. Circular Motion & Gravitation
7. Vibrations & Waves
8. Sound
9. Light & Geometric Optics
10. Electrostatics
11. Electric Circuits
12. Magnetism

MODERN FOREIGN LANGUAGE

12TH GRADE OVERVIEW

MODERN LITERATURE

SENIOR THESIS

1. The Senior Thesis Prompt
2. The Booklist

HISTORY: MODERN WORLD

1. Waves of Revolution
2. Industrialization
3. Late Modern Philosophies
4. The Balance of Power
5. The Great War
6. The Russian Revolution
7. Rise of Totalitarianism
8. World War II
9. Disintegration of the British Empire
10. Chinese Civil War
11. Start of the Cold War
12. Cold War "Proxy Wars"
13. Eastern Bloc during the Cold War
14. Conflicts in the Middle East
15. Crisis & Collapse in the Soviet Union
16. Europe after the Cold War

AMERICAN GOVERNMENT AND POLITICS

1. The American Founding
2. The Constitution
3. Progressivism
4. Politics of Liberation and Social Justice: 1960s

5. The Living Constitution
6. Democratic Politics
7. Governing Institutions and Public Policy
8. Democratic Life and Its Challenges

MATHEMATICS - CALCULUS

1. Introduction to Calculus
2. The Derivative
3. The Integral
4. Geometrical Significance of the Derivative
5. Differentiation & Integration of Powers of X
6. Differentiation & Integration Theorems
7. The Chain Rule
8. Maxima and Minima
9. The Definite Integral
10. Trigonometric Functions
11. Inverse Trigonometric Functions

12. Logarithmic & Exponential Functions
13. Differentials & the Mean Value Theorem
14. Further Integration Techniques
15. Geometric Integral Applications
16. Physical Applications of Integrals
17. Taylor's Theorem & Infinite Series

12TH GRADE SCIENCE

1. Astronomy
2. Biology II
3. Chemistry II
4. Physics II
5. Earth Science

Appendix C: 9-12 Core Content Courses and Electives

High School will not begin at Highlands Charter Academy until 2032, three years after this five-year charter. The Board is making plans for the school to reach K-12.

9th Grade: Composition, Rhetoric, Ancient Literature, History: Ancient World to 500AD, Geometry, Biology, Art Elective, Music Elective, Physical Education, and Latin III.

10th Grade: British Literature, History: Europe 500-1815, Intro to Moral & Political Philosophy, Economics, Algebra II, Chemistry, Elective: Modern Foreign Language, and Elective: Latin IV.

11th Grade: American Literature, American History 1607-Present, Moral & Political Philosophy, Precalculus & Trigonometry, Physics, and Modern Foreign Language.

12th Grade: Modern Literature, Senior Thesis, History: Modern World, American Government & Politics, Calculus, Astronomy, Biology II, Chemistry II, Physics II, and Earth Science.

ELECTIVES

A sample of the electives we hope to be made available to our high school students may include but will not be limited to are:

- Advanced Latin or Other Foreign Language Elective
- Studio Art
- Piano Performance
- Choir
- String Ensemble
- Personal Finance
- Art of Public Speaking
- Ethics
- Creative Writing
- Existentialist Philosophy
- Applied Philosophy
- Principles of Engineering
- Examining the Teaching Profession
- Introduction to Linguistics

HCA 2025-2026 Calendar

July 2025						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

August 2025						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

September 2025						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

October 2025						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

November 2025						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

December 2025						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

January 2026						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31










February 2026						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

March 2026						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

April 2026						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

May 2026						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

June 2026						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Federal Holiday		Students Return		Virtual Workday	
Break		Teacher Workday		Open House	
BT/Newcomer Orientation		Students Last Day		Half Day	

Appendix E: Daily and Weekly Schedule

K-5 Sample Daily Schedule

Monday:

8:30-9:00am: Morning Meeting
9:00-10:00am: Language Arts
10:00-10:15am: Recess
10:15-11:00am: Math
11:00-11:45am: Science/Social Studies
11:45-12:30pm: Lunch
12:30-1:00pm: Quiet Reading Time
1:00-2:00pm: Specials (Art, Music, PE)
2:00-2:45pm: Writing
2:45-3:15pm: Independent Practice

Tuesday:

8:30-9:00am: Morning Meeting
9:00-10:00am: Math
10:00-10:15am: Recess
10:15-11:00am: Language Arts
11:00-11:45am: Science/Social Studies
11:45-12:30pm: Lunch
12:30-1:00pm: Quiet Reading Time
1:00-2:00pm: Specials (Art, Music, PE)
2:00-2:45pm: Writing
2:45-3:15pm: Independent Practice

Wednesday:

8:30-9:00am: Morning Meeting
9:00-10:00am: Language Arts
10:00-10:15am: Recess
10:15-11:00am: Math
11:00-11:45am: Science/Social Studies
11:45-12:30pm: Lunch
12:30-1:00pm: Quiet Reading Time
1:00-2:00pm: Specials (Art, Music, PE)
2:00-2:45pm: Writing
2:45-3:15pm: Independent Practice

Thursday:

8:30-9:00am: Morning Meeting
9:00-10:00am: Math
10:00-10:15am: Recess
10:15-11:00am: Language Arts
11:00-11:45am: Science/Social Studies
11:45-12:30pm: Lunch

12:30-1:00pm: Quiet Reading Time
1:00-2:00pm: Specials (Art, Music, PE)
2:00-2:45pm: Writing
2:45-3:15pm: Independent Practice

Friday:

8:30-9:00am: Morning Meeting
9:00-10:00am: Language Arts
10:00-10:15am: Recess
10:15-11:00am: Math
11:00-11:45am: Science/Social Studies
11:45-12:30pm: Lunch
12:30-1:00pm: Quiet Reading Time
1:00-2:00pm: Specials (Art, Music, PE)
2:00-2:45pm: Writing
2:45-3:15pm: Independent Practice

6-8 Daily Schedule

Monday:

8:30-9:00am: Homeroom/Advisory
9:00-10:00am: Language Arts
10:00-10:15am: Recess
10:15-11:15am: Math
11:15-12:00pm: Science/Social Studies
12:00-12:45pm: Lunch
12:45-1:45pm: Elective 1
1:45-2:30pm: PE/Health
2:30-3:00pm: Study Hall/Independent Work

Tuesday:

8:30-9:00am: Homeroom/Advisory
9:00-10:00am: Math
10:00-10:15am: Recess
10:15-11:15am: Language Arts
11:15-12:00pm: Science/Social Studies
12:00-12:45pm: Lunch
12:45-1:45pm: Elective 2
1:45-2:30pm: PE/Health
2:30-3:00pm: Study Hall/Independent Work

Wednesday:

8:30-9:00am: Homeroom/Advisory
9:00-10:00am: Language Arts
10:00-10:15am: Recess
10:15-11:15am: Math
11:15-12:00pm: Science/Social Studies
12:00-12:45pm: Lunch

12:45-1:45pm: Elective 3
1:45-2:30pm: PE/Health
2:30-3:00pm: Study Hall/Independent Work

Thursday:

8:30-9:00am: Homeroom/Advisory
9:00-10:00am: Math
10:00-10:15am: Recess
10:15-11:15am: Language Arts
11:15-12:00pm: Science/Social Studies
12:00-12:45pm: Lunch
12:45-1:45pm: Elective 4
1:45-2:30pm: PE/Health
2:30-3:00pm: Study Hall/Independent Work

Friday:

8:30-9:00am: Homeroom/Advisory
9:00-10:00am: Language Arts
10:00-10:15am: Recess
10:15-11:15am: Math
11:15-12:00pm: Science/Social Studies
12:00-12:45pm: Lunch
12:45-1:45pm: Elective 5
1:45-2:30pm: PE/Health
2:30-3:00pm: Study Hall/Independent Work

Note: Elective courses may include art, music, foreign language, technology, and other options based on the school's offerings. PE/Health may also be split into two separate courses.

9-12 Daily Schedule

High School will begin in 2023. This Charter will be renewed in 2030. This portion may be revised at that time.

Monday - Friday:

Period 1: 8:00-8:50am

English Language Arts
World Literature
AP English Language and Composition
Creative Writing

Period 2: 8:55-9:45am

Mathematics
Algebra II
Geometry
Pre-Calculus

Period 3: 9:50-10:40am

Science
Biology

Chemistry

Physics

Period 4: 10:45-11:35am

Social Studies

World History

US History

AP Comparative Government and Politics

Lunch Break: 11:35-12:20pm

Period 5: 12:20-1:10pm

World Languages

Spanish I, II, III

French I, II, III

Latin I, II, III

Period 6: 1:15-2:05pm

Electives

Technology

Orchestra

Chorus

Yearbook

Period 7: 2:10-3:00pm

Physical Education

Health & Fitness

Team Sports

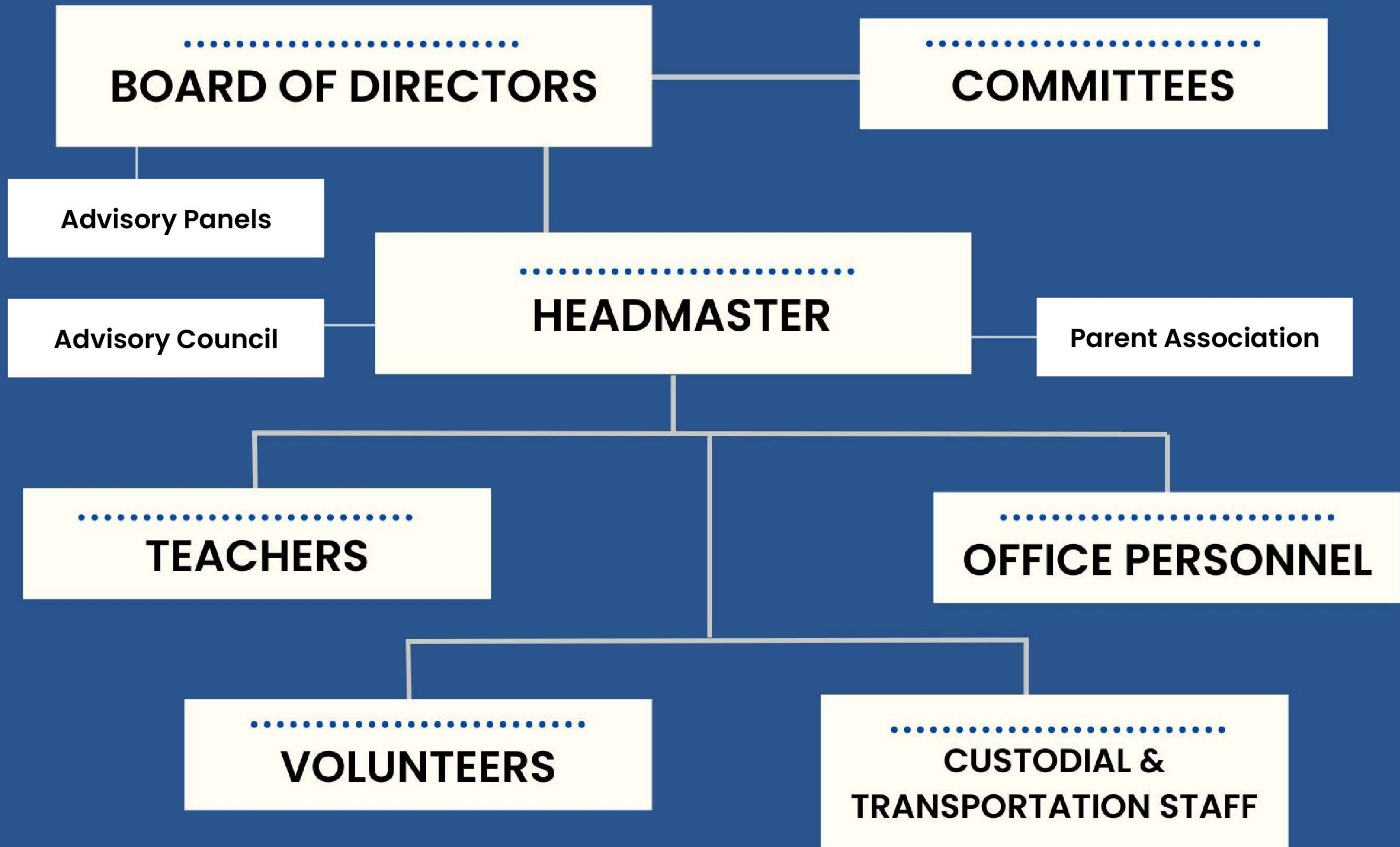
Dance

Appendix F Federal Documentation of Tax-Exempt Status

Highlands Charter Academy is in the process of obtaining tax-exempt status.



ORGANIZATIONAL CHART



**BYLAWS
OF
HIGHLANDS CHARTER ACADEMY**

ARTICLE I

Principal Office

The principal office of Highlands Charter Academy (the “School”) shall be located at 3313 Kelly Plantation Road, Carthage, North Carolina 28327 or at such other place as the Board of Directors may determine.

ARTICLE II

Purposes

The objects and purposes for which the School is formed are, without limitation thereupon, set forth in its Articles of Incorporation and include charitable, educational and benevolent purposes described in Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, (the “Code”) including, but not limited to, include operation of a charter school and activities related or incident thereto.

ARTICLE III

Directors

1. General Powers. All corporate powers shall be exercised by or under the authority of, and the affairs of the School shall be managed under the direction of the Board of Directors of the School. Unless indicated otherwise, “Board of Directors” shall mean the Board of Directors of the School.

2. Number and Qualification. The Board of Directors shall be elected by the incumbent Board of Directors at its annual meeting. The number of directors shall be no fewer than five (5) and no more than eleven (11). The number of directors may be changed from time to time by amendment to these Bylaws, provided that no decrease in the number shall have the effect of shortening the term of any incumbent director. Directors of the School need not be residents of the State of North Carolina.

3. Terms.

a. Each director shall serve until the director resigns, dies, is removed, replaced or is otherwise unable to serve. Each director shall serve a three-year term. In the event of a vacancy, a replacement director will serve the remaining term of the director being replaced, and this will not be counted as his initial term. One-third of the number of initial Directors shall serve a term of one year, one-third shall serve a term of two years, and one-third shall serve a term of three years so that the term of future directors will be staggered.

b. Subject to the second sentence of this Section 3(b), directors who have served one three-year term (or a lesser term pursuant to Section 3(a)) shall be eligible for re-election to one additional three-year term; provided, however, that the Board of Directors may, in its discretion and upon the affirmative vote of two-thirds of the directors present and voting, elect a director to more than two three-year terms, or to a portion of a three-year term, in the event that it deems it in the best interests of the School to do so.

c. A Director elected to fill a vacancy shall be eligible for election to two full terms of three years each upon the expiration of the unexpired term of his or her predecessor.

d. No director shall be younger than twenty-one years old when he or she is installed as a director.

4. Initial Directors. The initial board of directors shall be the individuals named in the resolution authorizing the adoption of these bylaws. They shall serve until the Board of Directors, at its next regularly scheduled annual meeting, conducts elections to be held in accordance with these bylaws.

5. Removal. Any elected director may be removed, with or without cause, upon the vote of a majority of all of the Board of Directors then in office.

6. Vacancies. Vacancies occurring in the Board of Directors may be filled upon the vote of a majority of all of the Board of Directors then in office.

7. Compensation. Directors shall not be compensated for their services as such, but the Board of Directors may provide for the payment of expenses which are incurred by directors in connection with the performance of their duties.

8. Executive Committee. By action of a majority of the number of directors then in office, the Board of Directors may elect an Executive Committee consisting of the Chair and two or more other directors. Subject to such restrictions and limitations as may be imposed from time to time by the Board of Directors, the Executive Committee shall have and may exercise the full authority of the Board of Directors in the management of the School, except that it shall have no authority as to the following matters: (a) distributions, as defined in the North Carolina Nonprofit Corporation Act; (b) the dissolution, merger or consolidation of the School, the amendment of the Articles of Incorporation of the School, or the sale, lease or exchange of all or substantially all of the property of the School; (c) the designation of any committee of the Board of Directors or the filling of vacancies in the Board of Directors or in any such committee; (d) the amendment or repeal of the bylaws or the adoption of new bylaws; or (e) the amendment or repeal of any resolution of the Board of Directors which by its terms shall not be so amendable or repealable. The Executive Committee shall report to the Board of Directors from time to time with respect to significant actions taken by it.

9. Other Committees. By action of a majority of the number of directors then in office, the Board of Directors may from time to time designate such other committees as in the judgment of the Board of Directors may be necessary to carry out the objects and purposes of the School and may determine the duties and tenure of each such committee.

ARTICLE IV

Meetings of Directors

1. Regular Meetings. The Board of Directors may provide, by resolution, the time and place for the holding of its regularly scheduled meetings, of which there shall be at least ten annually, and its annual meeting. The annual meeting shall be held at a time and place to be determined by the Board of Directors, and shall be held each year at such time as the Board of Directors may fix, for the purpose of electing directors and officers and for the transaction of other business.

2. Special Meetings. Special meetings of the Board of Directors may be called by or at the request of the Chair, Secretary, Treasurer or any two directors, or, in the case of a committee meeting, by the chair of the committee. Such meetings may be held within or without the State of North Carolina, and should include an agenda and purpose of the meeting.

3. Notice of Meetings. Annual meetings and regular meetings of the Board of Directors may be held with five (5) days prior notice. The person or persons calling a special meeting of the Board of Directors shall provide notice at least 48 hours before the meeting. Notice under this provision may be given by any usual means of communication, including without limitation, personal notice, written notice and electronically communicated notices. Such notice need not specify the purpose for which the meeting is called.

4. Waiver of Notice. Any director may waive any required notice before or after the date and time stated in the notice. Attendance at or participation by a director in a meeting shall constitute a waiver of notice of such

meeting, unless the director at the beginning of the meeting (or promptly upon arrival) objects to holding the meeting or transacting any business at the meeting and does not thereafter vote for or assent to action taken at the meeting.

5. Quorum. One-half of the directors in office shall constitute a quorum for the transaction of business at a board meeting of the Board of Directors. One-half of the members of a committee of the Board of Directors shall constitute a quorum for the transaction of business at a meeting of the committee.

6. Manner of Acting. Except as otherwise provided by law, the Articles of Incorporation or these bylaws, the act of a majority of the directors present at a meeting at which a quorum is present shall be the act of the Board of Directors.

7. Conflict of Interest Transactions.

A. Definition: “Conflict of interest transaction” means any transaction in which a director has a direct interest or an indirect interest. A director has a direct interest in a transaction if the director or a member of the director’s immediate family has either a material financial interest in the transaction or a relationship with the other parties to the transaction that might reasonably be expected to affect his or her judgment. A director has an indirect interest in a transaction if either (i) another entity in which the director has a material financial interest or in which the director is a general partner is a party to the transaction, or (ii) another entity of which the director is also a director or is an officer or trustee is a party to the transaction and the transaction is of sufficient importance that it should be considered by the Board of Directors of the School.

B. Special Requirements: A conflict of interest transaction is not voidable by the School solely because of a director’s interest in the transaction if (i) the material facts of the transaction and the director’s interest were disclosed or known to the Board of Directors or a committee of the Board and the Board or Committee authorized, approved or ratified the transaction, or (ii) the transaction was fair to the School.

C. Disclosure: A director who has a direct or indirect interest in any transaction presented to the Board of Directors or any committee of the Board shall disclose his or her interest.

D. Approval: A conflict of interest transaction must be authorized, approved or ratified by the affirmative vote of a majority of the directors (not fewer than two) on the Board of Directors (or the appropriate committee) who have no direct or indirect interest in the transaction and to whom the material facts of the transaction and of any director’s interest in the transaction were disclosed or known. If a majority of the directors, who have no direct or indirect interest in the transaction vote to authorize, approve or ratify the transaction, a quorum is present for the purpose of taking such action. The presence of, or a vote cast by, a director with a direct or indirect interest in the transaction does not affect the validity of any action taken in accordance with this paragraph.

8. Presumption of Assent. A director of the School who is present at a meeting of the Board of Directors or a committee of the Board of Directors when corporate action is taken shall be deemed to have assented to the action taken unless the director objects at the beginning of the meeting (or promptly upon arrival) to holding it or transacting business at the meeting, the director’s dissent or abstention from the action is entered in the minutes of the meeting, or the director files written notice of dissent or abstention with the presiding officer of the meeting before its adjournment or with the School immediately after the adjournment of the meeting. The right of dissent or abstention is not available to a director who voted in favor of the action taken.

9. Attendance by Telephone or Video Conference. The Board of Directors may permit any or all directors to participate in a regular or special meeting by, or conduct the meeting through the use of, any means of communication by which all directors participating may simultaneously hear each other during the meeting. A director participating in a meeting by this means is deemed to be present in person at the meeting.

10. Informal Action by Directors. Action taken without a meeting is nevertheless Board action if written consent to the action in question, describing the action taken, is signed by all the directors and filed with the minutes of the proceedings of the Board or filed with the corporate records, whether done before or after the action so taken. Such action shall be effective when the last director signs the consent, unless the consent specifies a different effective date. Consent may be given in writing or by electronic communication.

11. North Carolina Open Meetings Law. The School is required to comply with the North Carolina Open Meetings Law codified in Article 33C of Chapter 143 of the North Carolina General Statutes. All official meetings of the Board of Directors are generally required to be open to public attendance. An “official meeting” occurs at any time or place where a majority of the Board of Directors is communicating, and the communication is for the purpose of conducting hearings, deliberations, voting, or otherwise transacting business within the scope of the committee’s jurisdiction or charge. Official meetings may also be conducted in person, by conference call, video conference, or other electronic means. Informal gatherings may not be used as a method of evading this regulation.

12. Robert’s Rules. The Board of Directors and its committees shall conduct their respective meetings in substantial compliance with the most recent edition of Robert’s Rules of Order (“Robert’s Rules”) pursuant to which, absent bad faith or an intentional disregard of the requirements of the most recent edition of Robert’s Rules, no action of the Board of Directors or any of its committees shall be invalid on the sole ground of non-compliance with the most recent edition of Robert’s Rules.

13. Resignation. Any Director may resign at any time by delivering written notice to the President or the Secretary at the registered office of the corporation, or by giving oral or written notice at any meeting of the Directors. Any such resignation shall take effect at the time specified therein, or if the time is not specified, upon delivery thereof and, unless otherwise specified therein, the acceptance of such resignation shall not be necessary to make it effective.

14. Board Committees.

A. Standing or Temporary Committees

The Board, by resolution adopted by a majority of the Directors in office, may designate and appoint one or more standing or temporary committees, each of which shall consist of two or more Directors. Such committees shall have and exercise the authority of the Directors in the management of the corporation, subject to such limitations as may be prescribed by the Board; except that no committee shall have the authority to: (i) amend, alter, or repeal these Bylaws; (ii) elect, appoint or remove any member of any other committee or any Director or officer of the corporation; (iii) amend the Articles of Incorporation; (iv) adopt a plan of merger or consolidation with another corporation; (v) authorize the sale, lease or exchange of all or substantially all of the property and assets of the corporation not in the ordinary course of business; (vi) authorize the voluntary dissolution of the corporation or revoke proceedings therefore; (vii) adopt a plan for the distribution of assets of the corporation; or (viii) amend, alter, or repeal any resolution of the Board which by its terms provides that it shall not be amended, altered or repealed by a committee. The designation and appointment of any such committee and the delegation thereto of authority shall not operate to relieve the Board or any individual Director of any responsibility imposed upon it, him or her, by law.

B. Quorum; Manner of Acting

A minimum one half (½) of the number of Directors composing any committee shall constitute a quorum, and the act of a majority of the members of a committee present at a meeting at which a quorum is present shall be the act of the committee.

C. Resignation

Any member of any committee may resign at any time by delivering written notice thereof to the President, the Secretary, or the chair of such committee, or by giving oral or written notice at any meeting of such committee. Any such resignation shall take effect at the time specified therein, or if the time is not specified, upon delivery thereof and, unless otherwise specified therein, the acceptance of such resignation shall not be necessary to make it effective.

D. Removal of Committee Member

The Board, by resolution adopted by a majority of Directors in office, may remove from office any member of any committee elected or appointed to it.

ARTICLE V

Officers

1. Number. The officers of the School shall consist of a Chair, Secretary, Treasurer, and such Assistant Secretaries, Assistant Treasurers and other officers as the Board of Directors may from time to time elect. The Chair from the prior year shall serve as an officer for the immediately following year. Any two or more offices may be held by the same person, but no officer may act in more than one capacity where action of two or more officers is required.

2. Election and Term. The Board of Directors shall elect a Chair each year at its annual meeting. The other officers of the School shall be elected by the Board of Directors at any annual, regular or special meeting of the Board. Each officer shall hold office until death, resignation, retirements, removal, disqualification or until his or her successor is elected and qualified. Each officer shall be elected to serve a term of one years and shall be eligible for re-election to such office for a second term of one-year.

3. Removal. Any officer or agent of the School may be removed by the Board of Directors with or without cause.

4. Compensation. Officers shall not be compensated for their services as such, but the Board of Directors may provide for the payment of expenses incurred by officers in connection with the performance of their duties.

5. Chair. The Chair of the Board of Directors shall, when present, preside at all meetings of the Board of Directors and, in general, shall perform all duties as may be assigned by the Board of Directors from time to time.

6. Secretary. The Secretary shall keep accurate records of the acts and proceedings of all meetings of directors, shall give all notices required by law and by these bylaws, shall have general charge of the corporate records and books and of the corporate seal, and shall affix the corporate seal to any lawfully executed instruments requiring it. The Secretary shall, in general, perform all duties incident to the office of Secretary and such other duties as may be assigned from time to time by the Chair or by the Board of Directors.

7. Treasurer. The Treasurer shall also have custody of all funds and securities belonging to the School, shall receive, deposit and disburse the same under the direction of the Board of Directors, and shall keep full and accurate accounts of the finances of the School in books especially provided for that purpose, provided that the Board of Directors may from time to time designate one or more fiscal agents to perform all or any part of these duties. The Treasurer shall, in general, perform, all duties incident to the office of Treasurer and such other duties as may be assigned from time to time by the Chair or by the Board of Directors.

8. Assistant Secretaries and Assistant Treasurers. The Assistant Secretaries and Assistant Treasurers shall, in the absence or disability of the Secretary or the Treasurer, respectively, perform the duties and exercise the powers of those offices and shall, in general, perform such other duties as shall be assigned to them by the Secretary or Treasurer, respectively, or by the Chair or the Board of Directors.

ARTICLE VI

Indemnification

1. Extent. In addition to the indemnification otherwise provided by law, the School shall indemnify and hold harmless its directors and officers against liability and expenses, including reasonable attorneys' fees, incurred in connection with any action, suit, proceeding or claim arising out of their status as directors or officers or their activities in any of such capabilities or in any capacity in which any of them is or was serving, at the School's request, in another corporation, School, joint venture, trust or other enterprise; provided, however, that the School shall not indemnify a director or officer against any liability or litigation expense that the director or officer may incur on account of activities that at the time taken were believed or known (or reasonably should have been known) by the director or officer to be clearly in conflict with the best interests of the School or if the director or officer received an improper personal benefit. The School shall also indemnify a director or officer for reasonable costs, expenses and

attorneys' fees in connection with the enforcement of rights to indemnification granted herein, if it is determined in accordance with Section 2 of this Article that the director or officer is entitled to indemnification.

2. Determination. Indemnification under Section 1 of this Article shall be paid by the School with respect to any action, suit, proceeding or claim only after a determination that the liability and/or litigation expenses for which indemnification is sought (a) were not incurred on account of activities which at the time taken were believed or known (or reasonably should have been known) by the person seeking indemnification to be clearly in conflict with the best interests of the School and (b) did not involve any transaction from which the person seeking indemnification derived an improper personal benefit. Such determination shall be made (i) by the affirmative vote of a majority (but not less than two) of the directors who were not parties to the action, suit or proceeding or against whom the claim was not asserted ("disinterested directors") even though less than a quorum, (ii) by independent legal counsel in a written opinion, or (iii) by a court of competent jurisdiction.

3. Advanced Expenses. Expenses incurred by a director or officer in defending any action, suit, proceeding or claim may upon approval of a majority (but not less than two) of the disinterested directors, even though less than a quorum, or, if there are less than two disinterested directors, upon unanimous approval of the Board of Directors, be paid by the School in advance of the final disposition of such action, suit, proceeding or claim upon receipt of an undertaking by or on behalf of the director or officer to repay such amount less it shall ultimately be determined that the director or officer is entitled to be indemnified against such expenses by the School.

4. Reliance and Consideration. Any director or officer who at any time after the adoption of this Article VI series or has served in any of the aforesaid capacities for or on behalf of the School shall be deemed to be doing or to have done so in reliance upon, and as consideration for, the right of indemnification provided herein. Such right shall inure to the benefit of the legal representatives of any such person and shall not be exclusive of any other rights to which such person may be entitled apart from the provision of this Article VI. No amendment, modification or repeal of this Article VI shall adversely affect the right of any director or officer to indemnification hereunder with respect to any activities occurring prior to the time of such amendment, modification or repeal.

5. Insurance. The School may purchase and maintain insurance on behalf of its directors, officers, employees and agents and those persons who served or were serving at the request of the School as a director, officer, partner, trustee, employee, or agent of, or in some other capacity in, another corporation, limited liability company, joint venture, trust, employee benefit plan, or other enterprise against any liability asserted against or incurred by him or her in any such capacity, or arising out of his or her status as such, whether or not the School would have the power to indemnify against such liability under the provisions of this Article VI or otherwise. Any full or partial payment made by an insurance company under any insurance policy covering any director, officer, employee or agent made to or on behalf of a person entitled to indemnification under this Article VI shall relieve the School of its liability for indemnification provided for in this Article VI or otherwise to the extent of such payment, and no insurer shall have a right of subrogation against the School with respect to such payment.

ARTICLE VII

General Provisions

1. Management of Corporate Funds. No funds received by donation, bequest or any other means shall be diverted from the use specified by the donor, testator or testatrix unless said use is contrary to or in conflict with the purposes of the School. No funds shall be used for any purpose other than to effect the purposes of the School. The School will designate a depository and establish policies on deposits and withdrawals of funds from such accounts by resolution at its initial meeting. Until the initial meeting is held, any officer of the School is authorized to establish an account with a bank or depository, with all funds of the School deposited in the name of "Highlands Charter Academy." Withdrawals from such accounts shall be made only by check or similar order signed by the officer and any other individuals as designated by the board of directors.

2. Exempt Activities. Notwithstanding any other provision of these bylaws, no director, officer, employee or representative of this School shall take any action or carry any activity by or on behalf of the School not permitted to be taken or carried on by an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, and its Regulations as they now exist, or as they may hereafter be amended.

3. Fiscal Year. Unless otherwise ordered by the Board of Directors, the fiscal year of the School shall be from January 1 to December 31.

4. Amendments. These bylaws may be amended or repealed and new bylaws may be adopted by the affirmative vote of a majority of the directors then in office at any regular or a special meeting of the Board of Directors.

5. No Personal Liability. No director or officer of the School shall be liable or responsible for the debts or obligations of the School.

6. Non-Discrimination. The School shall not discriminate, whether in admissions, employment or in any other manner, on any basis prohibited by applicable law and shall comply with all applicable laws (including, without limitation, all laws and regulations applicable to the operation of charter schools in the State of North Carolina).

Adopted as of _____, 2023



NORTH CAROLINA

Department of the Secretary of State

To all whom these presents shall come, Greetings:

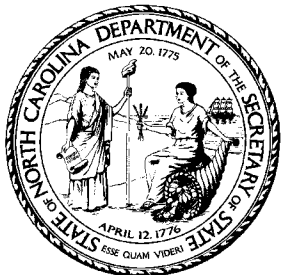
I, ELAINE F. MARSHALL, Secretary of State of the State of North Carolina, do hereby certify the following and hereto attached to be a true copy of

ARTICLES OF INCORPORATION

OF

HIGHLANDS CHARTER ACADEMY

the original of which was filed in this office on the 19th day of April, 2023.



Scan to verify online.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 19th day of April, 2023.

Elaine F. Marshall

Secretary of State

**ARTICLES OF INCORPORATION
OF HIGHLANDS CHARTER ACADEMY**

The undersigned, being a natural person of the age of eighteen (18) years or more, hereby makes and acknowledges these Articles of Incorporation for the purpose of forming a non-profit corporation under and by virtue of the laws of the State of North Carolina as contained in Chapter 55A of the North Carolina General Statutes, as amended (the “NCA”).

ARTICLE I

The name of the corporation is Highlands Charter Academy (the “Corporation”).

ARTICLE II

The period of duration of the Corporation shall be perpetual unless sooner dissolved in accordance with the NCA.

ARTICLE III

The Corporation will be a charitable or religious corporation within the meaning of Section 1-40(4) of the NCA.

ARTICLE IV

The Corporation is organized and operated exclusively for the sole benefit of, to perform the functions of, and to carry out the charitable, educational and benevolent purposes described in Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, (the “Code”) including, but not limited to, operation of a charter school and those other activities more particularly set forth in the bylaws.

The activities of the Corporation shall be limited to only those activities allowed by a non-profit organization with tax-exempt status under Code Section 501(c)(3) or the corresponding provisions of any successor federal tax code.

No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to, its directors, trustees, officers or other private persons, except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered to the Corporation and to make payments and distributions in furtherance of the purposes set forth in this Article IV 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 or intervene in any political campaign on behalf of, or in opposition to, any candidate for public office. Notwithstanding any other provision of these Articles of Incorporation, the Corporation shall not carry on any activities not permitted to be carried on (a) by a corporation exempt from federal income tax under Code Section 501(c)(3), as amended, or the corresponding section of any successor federal tax code, or (b) by a corporation, contributions to which are deductible under Code Section 170(c)(2), or the corresponding section or any successor federal tax code.

ARTICLE V

The Corporation will not have members.

ARTICLE VI

The street address of the initial registered office of the Corporation is 3313 Kelly Plantation Road, Carthage, North Carolina 28327 (Moore County). The mailing address of the initial registered office of the Corporation is 3313 Kelly Plantation Road, Carthage, North Carolina 28327 (Moore County). The name of the registered agent at the street and mailing address for the Corporation is Caroline Kelly.

ARTICLE VII

The street address of the principal office of the Corporation is 3313 Kelly Plantation Road, Carthage, North Carolina 28327 (Moore County). The mailing address of the principal office of the Corporation is 3313 Kelly Plantation Road, Carthage, North Carolina 28327 (Moore County).

ARTICLE VIII

A director shall not be personally liable to the Corporation for monetary damages arising out of any action, whether by or in the right of the Corporation or otherwise, for any breach of duty as a director, except for liability with respect to (a) acts or omissions that the director at the time of the breach knew or believed were clearly in conflict with the best interests of the Corporation, (b) any liability under Section 8-32 of the NCA or Section 8-33 of the NCA, and (c) any transaction from which the director derived an improper personal financial benefit. As used herein, the term "improper personal benefit" does not include a director's reasonable compensation or other reasonable incidental benefit for or on account of service as a director, officer, employee, independent contractor, attorney or consultant of the Corporation. If the North Carolina General Statutes are amended after the date of these Articles to authorize corporate action further eliminating or limiting the personal liability of directors, then the liability of a director of the Corporation shall be eliminated or limited to the fullest extent permitted by the North Carolina General Statutes, as so amended. No amendment or repeal of the provisions of this Article VIII shall apply to or have any effect on the liability or alleged liability of any director of the Corporation for or with respect to any act or failure to act on the part of such director occurring prior to such amendment or repeal. The provisions of this Article VIII shall not be deemed to limit or preclude indemnification of a director by the Corporation for any liability which has not been eliminated by the provisions of this Article VIII.

ARTICLE IX

In the event of the termination, dissolution or winding up of the affairs of the Corporation in any manner or for any reason whatsoever, the Directors shall, after paying or making provision for payment of all liabilities of the Corporation, distribute all of the remaining assets and property of the Corporation to such organization or organizations organized and operated exclusively for charitable, educational or scientific purposes under Code Section 501(c)(3) or Code Sections 170(b)(1)(A) (ii) and (iii) as may be directed by the Directors of the Corporation. Any such assets not so disposed shall be disposed of by the Superior Court of Moore County, North Carolina exclusively to such eligible organization or organizations as said court shall determine, that are organized and operated for such purposes pursuant to Code Section 501(c)(3) or to such local, state or federal governmental entities for such purposes.

ARTICLE X

The affairs of the Corporation shall be managed and governed by the Board of Directors of the Corporation. The Board of Directors may delegate any management functions it deems advisable. The number and method of election of directors, meetings, and other matters relating to directors shall be determined by the Bylaws subject to the provisions of this Article.

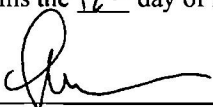
ARTICLE XI

The name and address of the incorporator is Stephen F. Later, 120 Applecross Road, Pinehurst, North Carolina 28374.

ARTICLE XII

These Articles of Incorporation shall be effective upon filing in the office of the North Carolina Secretary of State.

This the 12th day of April, 2023.



Stephen F. Later
Incorporator



April 19, 2023

Sharon Castelli

207 Eagle Lane (Central Office)

Asheboro, NC 27205

RE: Highlands Charter Academy Insurance Estimates

Dear Ms. Castelli,

Estimates for the current year's insurance rating would breakdown as follows -

- General liability + sexual abuse and molestation: \$8.50- 12.00 per student for the year = \$1,020 - \$1,440
- Educators legal: \$12 – 15 per a student for the year = \$1,440 - \$1,800
- Property: .15 - .25 (Moore County is more costal) per \$100. If you have \$1,000,000 in property values (building + contents + business income) = \$1,500 - \$2,000
- Auto: \$600 - \$850 per a bus for full coverage (newer buses cost more to insure)
- Crime- \$250 average for \$500,000 in coverage
- Workers Comp: .30-.35 per \$100 of payroll. If you have \$500,000 in payroll it would be \$1,500 - \$1,750
- Umbrella: roughly \$1000 - \$1200 per every \$1,000,000 layer (this goes over the general liability, sexual abuse, educators legal, and auto). Most charter schools have \$10M-\$15M and some higher.

Sincerely,

McKenzie Bele AAI, CLCS, Assistant Vice President

Enrollment Projections Year 1 through Year 5

In the following tables, please list for each year and grade level, the numbers of students that the school reasonably expects. Please indicate any plans to increase the grade levels offered by the school over time and be sure these figures match the

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

LEA #1:

What percentage of students from t

LEA #2:

What percentage of students from t

LEA #3:

What percentage of students from t

Grade	Year 1			Year 2			
	LEA #1 630	LEA #2	LEA #3	LEA #1 630	LEA #2	LEA #3	LEA #1 630
Kindergarten	36			54			72
Grade 1	36			54			72
Grade 2	40			60			80
Grade 3				44			66
Grade 4							44
Grade 5							
Grade 6							
Grade 7							
Grade 8							
Grade 9							
Grade 10							
Grade 11							
Grade 12							
LEA Totals:	112	0	0	212	0	0	334

For the first two years the State will fund the school up to the maximum projected enrollment for each of those years as subsequent years, the school may increase its enrollment only as permitted by NCGS 115C-218.7(b).

Budget: Revenue Projections from each LEA Year 1

State Funds: Charter schools receive an equivalent amount per student as the local education agency (LEA) receives per student receives from the State. Funding is based on the 1st month average daily membership.

In year 1: Base state allotments are determined by the LEA in which the student resides.

In year 2 and Beyond: Base State allotments are determined by the LEA in which the school is located.

Local Funds: Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.

State EC Funds: Charter schools receive a per pupil share of state funds per student with disabilities (school-aged 5 through 21). Funds are limited to 12.75% of the local education agency's average daily membership (ADM).

Federal EC Funds: Charter schools must qualify and apply for the individual federal grants based on their population of students.

REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS

LEA #1:	630-Moore**		
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
State Funds	6,146.27	112	\$688,382.24
Local Funds	\$2,500.00	112	\$280,000.00
State EC Funds	\$5,275.72	11	\$59,088.06
Federal EC Funds	\$1,514.35	11	\$16,657.85
Total:			\$1,044,128.15

LEA #2:			
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
State Funds		0	
Local Funds		0	
State EC Funds		0	
Federal EC Funds		0	
Total:			\$0.00

LEA #3:			
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
State Funds			
Local Funds			
State EC Funds			
Federal EC Funds			
Total:			\$0.00

Total Budget: Revenue Projections Year 1 through Year 5

All per pupil amounts are from the most current information and would be approximations for Year 1.

Federal funding is based upon the number of students enrolled who qualify. The applicant should use caution when relying year one to meet budgetary goals.

These revenue projection figures do NOT guarantee the charter school would receive this amount of funding in Year 1.

For local funding amounts, applicants will need to contact their local offices or LEA.

Income:	Year 1	Year 2	Year 3	Year 4
State ADM Funds	\$ 688,382	\$ 1,303,009	\$ 2,052,854	\$ 2,765,822
Local Per Pupil Funds	\$ 280,000	\$ 530,000	\$ 835,000	\$ 1,125,000
State EC Funds	\$ 59,088	\$ 111,845	\$ 176,209	\$ 237,407
Federal EC Funds	-	\$ 16,658	\$ 50,579	\$ 68,146
Other Funds*				
Working Capital*				
TOTAL REVENUE:	\$ 1,027,470	\$ 1,961,512	\$ 3,114,643	\$ 4,196,375

*All budgets should balance indicating strong budgetary skills. Any negative fund balances will, more than likely, generate a those evaluating the application. If the applicant is depending on other funding sources or working capital to balance the op provide documentation such as signed statements from donors, foundations, bank documents, etc., on the commitment of t figures are loans, the repayment needs to be explained in the narrative and found within the budget projections.

Assurances are needed to confirm the commitment of these additional sources of revenue. Please include these as Appenc



on federal funding in

Year 5	
\$	3,970,490
\$	1,615,000
\$	340,812
\$	97,827
\$	6,024,129

Additional questions by
creating budget, please
these funds. If these

dix M.

Personnel Budget: Expenditure Projections

Budget Expenditure Projections	Year 1			Year 2			Year 3			Year 4			Year 5		
	Number of	Average Salary	Total Salary	Number of	Average Salary	Total Salary	Number of	Average Salary	Total Salary	Number of	Average Salary	Total Salary	Number of	Average Salary	Total Salary
Administrative & Support Personnel															
Lead Administrator	1	\$ 65,000	\$ 65,000	1	\$ 67,000	\$ 67,000	1	\$ 68,000	\$ 68,000	1	\$ 68,500	\$ 68,500	1	\$ 69,000	\$ 69,000
Assistant Administrator	0	\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Finance Officer	0	\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Clerical	1	\$ 30,000	\$ 30,000	1	\$ 30,000	\$ 31,000	1	\$ 31,000	\$ 31,000	1	\$ 32,000	\$ 32,000	1	\$ 33,000	\$ 33,000
Food Service Staff	0	\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Custodians	1	\$ 28,000	\$ 28,000	1	\$ 28,000	\$ 28,000	1	\$ 29,000	\$ 29,000	1	\$ 29,000	\$ 29,000	1	\$ 30,000	\$ 30,000
Transportation Staff	1	\$ 28,000	\$ 28,000	1	\$ 28,000	\$ 28,000	1	\$ 29,000	\$ 29,000	1	\$ 29,000	\$ 29,000	1	\$ 30,000	\$ 30,000
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Total Admin and Support:	4		\$ 151,000	4		\$ 154,000	4		\$ 157,000	4		\$ 158,500	4		\$ 162,000
Instructional Personnel															
Core Content Teacher(s)	6	\$ 43,000	\$ 258,000	11	\$ 43,500	\$ 478,500	17	\$ 44,000	\$ 748,000	22	\$ 44,500	\$ 979,000	30	\$ 45,000	\$ 1,350,000
Electives/Specialty Teacher(s)	1	\$ 43,000	\$ 43,000	2	\$ 43,500	\$ 87,000	2	\$ 44,000	\$ 88,000	3	\$ 44,500	\$ 133,500	5	\$ 45,000	\$ 225,000
Exceptional Children Teacher(s)	1	\$ 43,000	\$ 43,000	1	\$ 43,500	\$ 43,500	1	\$ 44,000	\$ 44,000	2	\$ 44,500	\$ 89,000	3	\$ 45,000	\$ 135,000
Instructional Support		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Teacher Assistants	1	\$ 28,000	\$ 28,000	2	\$ 28,000	\$ 56,000	2	\$ 29,000	\$ 58,000	3	\$ 29,000	\$ 87,000	4	\$ 30,000	\$ 120,000
Substitute	1	\$ 10,000	\$ 10,000	1	\$ 10,000	\$ 10,000	2	\$ 10,000	\$ 20,000	3	\$ 12,000	\$ 36,000	4	\$ 12,000	\$ 48,000
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Total Instructional Personnel:	10		\$ 382,000	17		\$ 675,000	24		\$ 958,000	33		\$ 2,125,500	46		\$ 1,878,000
Total Admin, Support and Instructional Personnel:	14		\$ 533,000	21		\$ 829,000	28		\$ 1,115,000	37		\$ 2,284,000.00	50		\$ 2,040,000

Benefits	Year 1			Year 2			Year 3			Year 4			Year 5		
	Number of	Cost Per	Total	Number of	Cost Per	Total	Number of	Cost Per	Total	Number of	Cost Per	Total	Number of	Cost Per	Total
Administrative & Support Benefits															
Health Insurance	4	\$ 7,020	\$ 28,080	4	\$ 7,020	\$ 28,080	4	\$ 7,020	\$ 28,080	4	\$ 7,020	\$ 28,080	4	\$ 7,020	\$ 28,080
Retirement Plan--NC State	4	24.50%	\$ 36,995	4	24.50%	\$ 37,730	4	24.50%	\$ 38,465	4	24.50%	\$ 38,833	4	24.50%	\$ 39,690
Retirement Plan--Other		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Life Insurance		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Disability		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Medicare		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Social Security		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
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Total Admin and Support Benefits:			\$ 65,075			\$ 44,750			\$ 66,545			\$ 66,913			\$ 67,770
Instructional Personnel Benefits															
Health Insurance	9	\$ 7,020	\$ 63,180	16	\$ 7,020	\$ 112,320	23	\$ 7,020	\$ 161,460	32	\$ 7,020	\$ 224,640	45	\$ 7,020	\$ 315,900
Retirement Plan--NC State	9	24.50%	\$ 91,140	16	24.50%	\$ 162,925	23	24.50%	\$ 229,810	32	24.50%	\$ 511,928	45	24.50%	\$ 448,350
Retirement Plan--Other		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Social Security		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Disability		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Medicare		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
Life Insurance		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -
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Total Instructional Personnel Benefits:			\$ 154,320			\$ 275,245			\$ 391,270			\$ 736,568			\$ 764,250
Total Personnel Benefits:			\$ 219,395			\$ 319,995			\$ 457,815			\$ 803,480			\$ 832,020
Total Admin & Support Personnel (Salary & Benefits):	4		\$ 216,075	4		\$ 198,750	4		\$ 223,545	4		\$ 225,412.50	4		\$ 229,770
Total Instructional Personnel (Salary & Benefits):	10		\$ 536,320	17		\$ 950,245	24		\$ 1,349,270	33		\$ 2,862,068	46		\$ 2,642,250

TOTAL PERSONNEL:	14	\$	752,395	21	\$	1,148,995	28	\$	1,572,815	37	\$	3,087,480	50	\$	2,872,020
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*The personnel list below may be amended to meet the staffing of individual charter schools: This list should align with the projected staff located in the Operations Plan.

Operations Budget: Expenditure Projections

The following list of expenditure items is presented as an example. Applicants should modify to meet their needs.

OPERATIONS BUDGET: Administrative and Support			
	Year 1	Year 2	Year 3
Office			
Office Supplies	\$ 5,000.00	\$ 5,000.00	\$ 6,000.00
Paper	\$ 500.00	\$ 500.00	\$ 500.00
Computers & Software	\$ 13,000.00	\$ 15,000.00	\$ 15,000.00
Communications & Telephone	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Copier leases	\$ 10,000.00	\$ 10,000.00	\$ 12,000.00
Other	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
*** Insert rows and edit text as needed. ***			
Management Company			
Contract Fees			
Other			
*** Insert rows and edit text as needed. ***			
Professional Contract			
Legal Counsel	\$ 5,000.00	\$ 6,000.00	\$ 6,000.00
Student Accounting	\$ 1,500.00	\$ 1,500.00	\$ 1,500.00
Accounting Services	\$ 25,000.00	\$ 25,000.00	\$ 12,000.00
Audit Services	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Contracted EC Services	\$ 15,000.00	\$ 20,000.00	\$ 20,000.00
Facilities			
Facility Lease/Mortgage	\$ -	\$ -	\$ -
Maintenance	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00
Custodial Supplies	\$ 2,000.00	\$ 2,000.00	\$ 5,000.00
Custodial Contract			
Insurance (pg19)	\$ 20,000.00	\$ 20,000.00	\$ 22,000.00
Other			
*** Insert rows and edit text as needed. ***			
Utilities			
Electric	\$ 10,000.00	\$ 10,000.00	\$ 12,000.00
Gas	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Water/Sewer	\$ 3,000.00	\$ 3,000.00	\$ 7,500.00
Trash	\$ 2,500.00	\$ 2,500.00	\$ 3,000.00
Other	\$ 2,000.00	\$ 2,000.00	\$ 5,000.00
*** Insert rows and edit text as needed. ***			
Transportation			
Buses	\$ -	\$ -	\$ 40,000.00
Gas	\$ 3,500.00	\$ 3,000.00	\$ 30,000.00
Oil/Tires & Maintenance	\$ 3,000.00	\$ 5,000.00	\$ 20,000.00
Other	\$ 1,000.00	\$ 2,000.00	\$ 10,000.00
*** Insert rows and edit text as needed. ***			

Other			
Marketing	\$ 5,000.00	\$ 5,000.00	\$ 10,000.00
Child nutrition	\$ 30,000.00	\$ 40,000.00	\$ 43,000.00
Travel	\$ 1,000.00	\$ 2,000.00	\$ 2,000.00
Other	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
*** Insert rows and edit text as needed. ***			
Total Administrative & Support Operations:	\$ 191,000.00	\$ 212,500.00	\$ 315,500.00

OPERATIONS BUDGET:			
Instructional	Year 1	Year 2	Year 3
Classroom Technology			
Software	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Other			
*** Insert rows and edit text as needed. ***			
Instructional Contract			
Staff Development	\$ 2,000.00	\$ 2,000.00	\$ 3,000.00
Other			
*** Insert rows and edit text as needed. ***			
Books and Supplies			
Instructional Materials	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Curriculum/Texts	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Copy Paper	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Testing Supplies	\$ 2,000.00	\$ 2,500.00	\$ 3,000.00
Other	\$ 1,000.00	\$ 5,000.00	\$ 5,000.00
*** Insert rows and edit text as needed. ***			
Total Instructional Operations:	\$ 25,000.00	\$ 29,500.00	\$ 31,000.00
TOTAL OPERATIONS:	\$ 216,000.00	\$ 242,000.00	\$ 346,500.00

**Applicants may amend this table and the position titles to fit their Education and Operations Plans.*

Year 4		Year 5	
\$	6,000.00	\$	7,000.00
\$	500.00	\$	500.00
\$	18,000.00	\$	20,000.00
\$	6,000.00	\$	7,000.00
\$	12,000.00	\$	15,000.00
\$	2,000.00	\$	2,000.00
\$	6,000.00	\$	8,000.00
\$	1,500.00	\$	1,500.00
\$	12,000.00	\$	15,000.00
\$	5,000.00	\$	5,000.00
\$	20,000.00	\$	23,000.00
\$	-	\$	-
\$	15,000.00	\$	15,000.00
\$	5,000.00	\$	5,000.00
\$	22,000.00	\$	25,000.00
\$	15,000.00	\$	15,000.00
\$	5,000.00	\$	5,000.00
\$	7,500.00	\$	7,500.00
\$	4,000.00	\$	4,000.00
\$	5,000.00	\$	5,000.00
\$	45,000.00	\$	50,000.00
\$	40,000.00	\$	40,000.00
\$	20,000.00	\$	25,000.00
\$	10,000.00	\$	10,000.00

\$ 10,000.00	\$ 10,000.00
\$ 50,000.00	\$ 75,000.00
\$ 2,000.00	\$ 2,000.00
\$ 1,000.00	\$ 1,000.00
\$ 345,500.00	\$ 398,500.00

Year 4		Year 5	
\$	6,000.00	\$	7,000.00
\$	4,000.00	\$	5,000.00
\$	5,000.00	\$	5,000.00
\$	5,000.00	\$	5,000.00
\$	5,000.00	\$	5,000.00
\$	3,000.00	\$	5,000.00
\$	5,000.00	\$	5,000.00
\$	33,000.00	\$	37,000.00
\$	378,500.00	\$	435,500.00

Overall Budget

SUMMARY	Logic	Year 1	Year 2	Year 3	Year 4	Year 5
Total Personnel	J	\$ 752,395.00	\$ 1,148,995.00	\$ 1,572,815.00	\$ 3,087,480.00	\$ 2,872,020.00
Total Operations	M	\$ 216,000.00	\$ 242,000.00	\$ 346,500.00	\$ 378,500.00	\$ 435,500.00
Total Expenditures	N = J + M	\$ 968,395.00	\$ 1,390,995.00	\$ 1,919,315.00	\$ 3,465,980.00	\$ 3,307,520.00
Total Revenue	Z	\$ 1,027,470.30	\$ 1,961,512.35	\$ 3,114,642.52	\$ 4,196,374.65	\$ 6,024,128.94
Surplus / (Deficit)	= Z - N	\$ 59,075.30	\$ 570,517.35	\$ 1,195,327.52	\$ 730,394.65	\$ 2,716,608.94

Appendix O

A Headmaster for Highlands Charter Academy has not yet been identified.

❖ The selected Board Auditor that he/she has reviewed with the full Board of Directors, listed within the application, all the items required for the annual audit and 990 preparations.

○ Name of the Selected Board Auditor: Sharpe Patel PLLC

○ Date of Review: 4/21/2023

○ Signature of Board Members Present (Add Signature Lines as Needed):

- Caleb A. Gi
- Karen Manning
- Beth Ann Quatta
- Rebecca Staban
- D. Michael St. Lawrence
- Angene Westelle
- Chris
- Sh 52

Opening with grades K-2 and adding a grade each year. Imagine your child being in the first graduating class of a first-rate charter school!



Highlands Charter Academy will provide a rich and nourishing classical liberal arts education where students will flourish through intellectual rigor, and the encouragement of human virtue and responsible citizenship. They will be equipped with the tools to be self-disciplined and intellectually competent, with strong moral character and civic responsibility.

THE VISION

A group of Moore County, NC citizens are seeking to establish a public charter school of choice based on the tried and true principles of traditional K-12 education.

The focus will be on a proven classical curriculum, solid classroom instruction, and a school culture steeped in kindness, integrity, and respect. The team will collaborate with local parents, community leaders, and policymakers in launching the school.

The school will be a NC public charter school, meaning there is no tuition.

CURRICULUM

Highlands Charter Academy (HCA) will strive to train the minds and improve the hearts of our students through a classical, content-rich curriculum that emphasizes virtuous living, traditional learning, and civic responsibility.

The curriculum will be balanced and strong, emphasizing the four core disciplines of math, science, literature, and history, with attention to music, art, physical education, and foreign languages.

ADMISSIONS

Admission and enrollment of students will be as prescribed by the NC Charter School Act. Highlands Charter Academy will adhere to lottery requirements set forth by the Department of Public Instruction of NC.

Student recruitment and enrollment decisions shall be made in a non-discriminatory manner and without regard to race, color, creed, national origin, sex, religion, ancestry, disability, or need for special education services.

HCA will provide free and appropriate education and related services to children with special needs. The school will be responsible for meeting the needs of English language learners in compliance with State and Federal law.

LOCATION

HCA will be located in Moore County, North Carolina. Because there are three charter schools in the county's southern section, the property search will begin in Carthage, the center-most town of the county.

The Committee will be responsible for securing a site to rent for the first two or three years and, when funds are secured, purchasing or building necessary structures. NC charter schools must fund their facilities before opening, which means this will be the focus of early fundraising efforts.

EXPRESSION OF INTEREST

If there is a possibility you'd enroll your child or children in HCA, please let us know. Determining interest will help us better plan.

Please complete the short form at the bottom of the home page on our website or fill in the form below and mail to:

**Highlands Charter Academy
PO Box 175
Carthage, NC 28327**

Your submission is completely confidential and non-binding – we will not share your information.

Admission will be by lottery, and we will contact you at that time to ensure you wish your child to be included.

First and Last Name

Phone

E-Mail Address

Home Address

City, State, Zip

Grades Your Child or Children Will be Entering in
Aug. 2025



Please complete the short form at the bottom of the home page to help us plan for Moore County's interest.



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**A no-tuition
public school for
Moore County, NC**



If you currently have a child 3, 4, or 5 years old, they could be in the first classes of this new charter school!

HCA will begin with grades K-2 and add a grade each year until K-12 is reached.

Highlands Charter Academy

Conflict of Interest Information Form

Name: _____

Date: _____

Please describe below any relationships, positions, or circumstances in which you are involved that you believe could contribute to a “conflict of interest transaction” (as defined in the Highlands Charter Academy bylaws) arising.

I hereby certify that the information set forth above is true and complete to the best of my knowledge. I have reviewed, and agree to abide by, the conflict of interest provisions of the Highlands Charter Academy bylaws as currently in effect.

Signature: _____

FORBES > LEADERSHIP > EDUCATION

Dramatic New Evidence That Building Knowledge Can Boost Comprehension And Close Gaps

Natalie Wexler Senior Contributor 

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Building knowledge beginning in kindergarten can eliminate test-score gaps between lower- and ... [\[+\]](#) GETTY

Building students' general knowledge can lead to dramatic long-term improvements in reading comprehension, a new study suggests—casting serious doubt on standard teaching approaches.

A [rigorous study](#) involving more than 2,000 students has found that children who got a content-rich, knowledge-building curriculum for at least four years, beginning in kindergarten, significantly outperformed their peers on standardized reading

comprehension tests. Students from low-income families made such dramatic gains that their performance on state tests equaled that of children from higher-income families.

To understand the significance of these findings, it's important to have some background information. For [at least the past 25 years](#), reading scores in the U.S. have been largely stagnant, with about two-thirds of students scoring below proficient on national tests. Gaps between students at the upper and lower ends of the socioeconomic spectrum have remained wide and by [some estimates](#) have grown significantly, despite massive efforts to narrow them.

In response to low scores, schools have intensified instruction in reading, which includes the ability to decipher individual words. Over the past few years [there's been a push](#) to bring that aspect of reading instruction in line with scientific evidence showing the need for systematic instruction in phonics.

Reading Comprehension Instruction Focuses on Skills

But most of the time spent on reading is devoted to reading *comprehension*, which is what state and national tests purport to measure. The standard approach is to focus on comprehension skills and strategies, like “finding the main idea” of a text and “making inferences.” Often there is a skill of the week, which the teacher demonstrates using a book chosen not for its topic but for how well it lends itself to demonstrating the skill.

Then students practice the skill on other books—fiction, or nonfiction on random topics—that have been determined to match their individual reading levels. The goal is not for children to acquire any substantive knowledge but rather to master skills that will theoretically enable them to understand the complex texts they'll be expected to read in the future.

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Elementary schools devote [a reported average](#) of two hours a day to English language arts, or reading, with much less time allocated to social studies, science, and the arts. The assumption is that students don't need to acquire much substantive knowledge until they reach higher grade levels.

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This approach is so deeply entrenched that it has persisted despite its failure to produce gains in reading test scores. In the face of stubbornly low scores, the prescription has often been to double down on it.

Nevertheless, over the last several years, an increasing number of schools have shifted to [elementary literacy curricula](#) that systematically build children’s knowledge and vocabulary while also providing the kind of phonics instruction backed by science. But the trend towards knowledge-building hasn’t gained as much traction as the movement for systematic phonics.

One reason may be that we haven’t had strong experimental evidence for knowledge-building. We do have [lots of evidence](#) showing that readers who *have* relevant knowledge—either of the topic they’re reading about, or of general academic vocabulary—have better comprehension. That evidence supports the idea that students from higher-income families generally do better on reading tests because they’re better able to pick up academic knowledge outside of school. But it’s been harder to demonstrate that *building* knowledge leads to better comprehension.

The reason, researchers and others [have suggested](#), is that it can take a long time for the results of knowledge-building to show up on the standardized tests used to measure reading comprehension. The passages on those tests are on random topics, and it can take years for kids to acquire the critical mass of vocabulary that will enable them to understand texts on topics they haven’t actually learned about. In the meantime, the tests may be failing to measure the valuable knowledge students are in the process of acquiring.

The Colorado Study

That brings us to the long-awaited multi-year study released last week, conducted by researchers at the University of Virginia. The experiment took advantage of the fact that Colorado has long had an unusual number of elementary schools that use a knowledge-building curriculum. Researchers focused on nine such schools in the state that have more applicants than seats, requiring them to conduct lotteries for kindergarten admission. That allowed researchers to compare a “treatment group”—children who got in through the lotteries—with a “control group” consisting of children who applied but didn’t get in.

The 688 children admitted through the lottery got a curriculum based on the [Core Knowledge Sequence](#), which is similar to the [Core Knowledge Language Arts](#) (CKLA) curriculum. (At the time the study began, in 2009, that curriculum had not yet been developed.) Rather than putting comprehension skills in the foreground, the Sequence—

like CKLA—immerses children in rich content in history, geography, science, and other subjects, largely through having teachers read texts aloud and lead class discussions. (The study was done independently of the Core Knowledge Foundation, which developed both CKLA and the Sequence. It was financed through a mix of public and private funding.)

The [various knowledge-building curricula](#) developed in recent years all cover different topics in different ways, but they all share Core Knowledge's focus on content. Instead of jumping rapidly from one topic to another, students spend several weeks learning about each topic. They also read and write about the content covered in the core curriculum rather than random, unconnected topics. Previous studies have measured the results of some of these curricula, including CKLA, after one or two years and found a [positive but modest effect](#).

Researchers conducting the Colorado study waited four years, until the children reached third grade—the first year state standardized tests are given—before measuring the results. They continued to look at test scores for those students, and their peers who failed to win the lottery, through sixth grade.

They found that the treatment group as a whole experienced significant “moderate” gains on reading tests in each grade compared to the control group. The term “moderate” here can be misleading; it refers to categories of “effect sizes” in statistics. In fact the gains were large enough that, if translated to American students as a whole, the U.S. would move up to a position among the top five countries on an [international reading test](#) given to fourth-graders. Currently, it ranks 15th out of the 58 countries that participate.

Gap-Closing Gains for Students From Low-Income Families

Breaking down the study's results by income level leads to additional insights. Eight of the nine schools were located in middle- to high-income areas. Even though those children were presumably acquiring a fair amount of academic knowledge at home, they still benefited from acquiring knowledge at school. The effect size—which measures the difference between their performance and their respective control groups—was 0.445.

What does that mean? Again, the researchers characterize the effect as “moderate,” but it needs to be viewed in the context of effect sizes found for other interventions aimed at boosting reading comprehension. One [meta-analysis](#) of 82 studies of interventions for struggling readers—none of which involved systematically expanding knowledge—found an average effect size of 0.35. A federal [government report](#) assessing the effect of 24 studies of comprehension strategy instruction found an average effect size of just 0.10. That was considered sufficient for a panel of experts to recommend adopting the strategies studied, which included things like teaching students how to generate questions about what they were reading and make inferences.

In the Colorado study, the effect size for students at the one school in a low-income area was truly extraordinary: 1.299. They also got large boosts in math scores and on the state science test given to fifth-graders. In fact, their gains were so large that, according to the researchers, they *eliminated* the gaps on Colorado tests between students from low- and high-income families, in all three subjects.

You might have some questions about the study—for example:

- **How reliable is this data?**

The study has not yet been peer-reviewed or published, but the data have been subjected to rigorous evaluation. According to one of the researchers who worked on the study, Daniel Willingham, the lead author—David Grissmer—is extremely careful in analyzing data.

- **How definitive is this study?**

One study can never be definitive, although the researchers tried to eliminate potential sources of “bias” that might limit the applicability of the findings.

For example, all the schools in the study were charter schools, raising the possibility that the findings wouldn’t apply equally to other types of schools. But the researchers discount that possibility, observing that—outside of urban settings—charter schools don’t have a better track record than traditional public schools. All schools in the study were in suburban areas.

On the other hand, the fact that the one school in the study that served a low-income population was located in a suburb might be a limiting factor. The same results might not be found with a school in a low-income urban neighborhood.

As the researchers argue, the results of this study should prompt more research along the same lines: long-term studies, lasting at least four years, of the effects of knowledge-building at the elementary level. Long-term studies are expensive, which is one reason they’re rare, but they may be the only way to get reliable evidence of what actually works to boost reading comprehension.

- **Does this study mean that if we don’t start building kids’ knowledge in kindergarten, there’s nothing we can do for them?**

This study doesn’t address what can be done for students at higher grade levels. It’s not impossible to build knowledge later on, but it is more difficult. By the time students reach middle school or, especially, high school, the curriculum assumes a lot of academic knowledge they may not have. Those gaps in background knowledge can make it difficult or impossible for them to understand the content they’re expected to learn. One thing that can help is to explicitly teach students to [write about what they’re learning](#).

- **Does this mean we should just ignore the many studies showing positive effects from comprehension strategy instruction?**

No, but we need to recognize a few things about them. One is that few if any of those studies have followed students long-term—most last only a few weeks—so we don't know how long their effects continue. And those studies can't be used to justify teaching comprehension skills in isolation year after year, which is the standard practice.

It's also important to note that many commonly taught “skills and strategies” **don't actually have strong evidence** behind them. And the evidence for strategy instruction is actually strongest when multiple strategies are taught simultaneously—especially if those strategies are appropriate to the particular text at hand.

Any effective knowledge-building curriculum will bring in strategies in that way, even if they're not labeled as strategies. Students might be asked, for example, to predict what will happen next in a story or an account of a historical event, or they might be prompted to connect new information in a text to knowledge they've already acquired. Those are valuable teaching techniques, but they seem to work best when used to help students think analytically about specific content rather than being taught as free-floating skills.

The Colorado Study Should Lead to Changes in Practice

Even though this is just one study, it should be enough—when combined with the strong evidence that relevant knowledge is a key factor in comprehension—to spark a re-evaluation of the standard approach to reading comprehension.

It should also lead us to rethink how we measure academic progress. This study suggests —**as have others**—that relying solely on reading and math tests is a terrible idea.

One problem is that they fail to measure the knowledge students acquire through a knowledge-building curriculum. A bigger problem is that the importance attached to the tests is *preventing* most children from getting that kind of curriculum in the first place.

Reading tests provide a powerful incentive for educators to focus on the comprehension skills the tests purport to measure rather than the social studies and science topics kids need in order to understand the test passages—not to mention the complex texts they'll be expected to tackle at higher grade levels and in life.

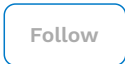
Schools within a state generally have the freedom to choose from a variety of curricula, making it impossible for states to develop tests grounded in the knowledge covered in any particular curriculum. But all states have social studies and science standards that specify content to be taught at each grade level. States could at least connect the passages on their reading tests to that content.

We do need more long-term studies like the Colorado one. But given all the evidence we have—both of the potential benefits of knowledge-building curriculum and the clear failings of the current approach—we can’t afford to wait until we have more data before taking action. We’ve already done enough damage to children’s future prospects—albeit with the best of intentions—and we can’t afford to prevent millions more students from reaching their full potential.

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Natalie Wexler



Natalie Wexler is the author of [The Knowledge Gap: The Hidden Cause of America's Broken Education System—and How to Fix...](#) **Read More**

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Year One Estimate

Ethnicity/Race	# of Students	Percentage (%)
American Indian or Alaska Native	1	1%
Asian	1	1%
Black or African American	14	13%
Hispanic	22	20%
Native HI or Pacific Islander	0	0%
Two or More Races	2	2%
White	72	64%
Total number of students:	112	
EDS Subgroups		0%
Economically Disadvantaged Students	55	49%
Students with Disabilities	2	2%
English Language Learners	8	7%
Students Experiencing Homelessness	0	0%
Total number of students:	65	

Equals Northern Moore Co. %

Higher than Northern Moore Co. which is 9%
Equals Northern Moore %

Equals Northern Moore %

**Academic
School Year**

Grade Levels

**Total Projected
Student Enrollment**

Year 1	K-2	112
Year 2	K-3	212
Year 3	K-4	334
Year 4	K-5	450
Year 5	K-6	646



A Kindergarten Lottery Evaluation of Core Knowledge Charter Schools: Should Building General Knowledge Have a Central Role in Educational and Social Science Research and Policy?

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The Core Knowledge curriculum is a K-8 curriculum focused on building students General Knowledge about the world they live in that is hypothesized to increase reading comprehension and Reading/English-LA achievement. This study utilizes an experimental design to evaluate the long term effects of attending Charter schools teaching the Core Knowledge curriculum. Fourteen oversubscribed kindergarten lotteries for enrollment in nine Core Knowledge Charter schools using the curriculum had 2310 students applying from parents in predominately middle/high income school districts. State achievement data was collected at 3rd-6th grade in Reading/English-LA and Mathematics and at 5th Grade in Science. A new methodology addresses two previously undiscovered sources of bias inherent in kindergarten lotteries that include middle/high income families. The unbiased confirmatory Reading-English-LA results show statistically significant ITT (0.241^{***}) and TOT (0.473^{***}) effects for 3rd-6th grade achievement with statistically significant ITT and TOT effects at each grade. Exploratory analyses also showed significant ITT (0.15^{*}) and TOT (0.300^{*}) unbiased effects at 5th grade in Science. A CK-Charter school in a low income school district also had statistically significant, moderate to large unbiased ITT and TOT effects in English Language Arts (ITT= 0.944^{**}; TOT = 1.299^{**}), Mathematics (ITT= 0.735^{*}; TOT = 0.997^{*}) and positive, but insignificant Science effects (ITT= 0.468; TOT = 0.622) that eliminated achievement gaps in all subjects.

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**A Kindergarten Lottery Evaluation of Core Knowledge Charter Schools:
Should Building General Knowledge Have a Central Role in Educational and
Social Science Research and Policy?**

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**A Kindergarten Lottery Evaluation of Core Knowledge Charter Schools: Should Building
“Cumulative Knowledge” Have a Central Role in Education Research and Policy?**

ABSTRACT

The Core Knowledge curriculum is a K-8 curriculum focused on building students General Knowledge about the world they live in that is hypothesized to increase reading comprehension and Reading/English-LA achievement. This study utilizes an experimental design to evaluate the long term effects of attending Charter schools teaching the Core Knowledge curriculum. Fourteen oversubscribed kindergarten lotteries for enrollment in nine Core Knowledge Charter schools using the curriculum had 2310 students applying from parents in predominately middle/high income school districts. State achievement data was collected at 3rd- 6th grade in Reading/English-LA and Mathematics and at 5th Grade in Science. A new methodology addresses two previously undiscovered sources of bias inherent in kindergarten lotteries that include middle/high income families. The unbiased confirmatory Reading-English-LA results show statistically significant ITT (0.241***) and TOT (0.473***) effects for 3rd-6th grade achievement with statistically significant ITT and TOT effects at each grade. Exploratory analyses also showed significant ITT (0.15*) and TOT (0.300*) unbiased effects at 5th grade in Science. A CK-Charter school in a low income school district also had statistically significant, moderate to large unbiased ITT and TOT effects in English Language Arts (ITT= 0.944**; TOT = 1.299**), Mathematics (ITT= 0.735*; TOT = 0.997*) and positive, but insignificant Science effects (ITT= 0.468; TOT = 0.622) that eliminated achievement gaps in all subjects.

Keywords: General Knowledge, Core Knowledge curriculum, kindergarten lottery, Charter schools

INTRODUCTION

Over the last 40 years, there have been several education reform efforts at the national and state level to improve achievement in both Mathematics and Reading/English-LA from K-12 (A Nation at Risk, 1983; National Education Goals Panel, 1998; No Child Left Behind, 2001, Common Core State Standards, 2013). A puzzling pattern of achievement gains has emerged over this 40 year period. At 4th and 8th grade, students have made very small gains in Reading/English-LA, while much larger gains occurred in Mathematics achievement, while at 12th grade, the math gains have also been small and no gains occurred for English-LA (Shakeel, M. D. & Petersen, P., E., 2022).

Figure 1 shows the contrasting long term achievement gains in Mathematics and Reading/English-LA at 4th and 8th grade using two different National Assessment of Educational Progress (NAEP) data sources. Gains in Mathematics at both 4th and 8th grade have been 3-4 times larger than Reading/English-LA gains. For instance, the median student taking Long Term NAEP in 2012 compared to the median student in 1978- 34 years earlier- would be scoring about 7 percentile points higher in Reading/English-LA, but 25 percentile points higher in Mathematics. Adding to the puzzling contrast between achievement gains in Mathematics and Reading/English-LA is the amount of weekly K-8 classroom time spent on teaching Mathematics (4.9. to 5.7 hours) is far less than Reading/English-LA (10.5 to 11.6 hours) and has changed little in decades (Morton, B., & Dalton, B., 2007; Hoyer, K., M., & Sparks, D., 2017; Perie et al, 1997).

Two questions that arise for researchers and policymakers from this data are:

- Why has so little progress been made in increasing English-LA achievement at 4th, 8th and 12th grade in the last 30-40 years?
- What kinds of new educational and social reforms and policies are needed to improve future Reading/English-LA achievement?

Future national, state and local K-12 school reforms cannot be successful unless research can address these two questions.

Several national and select panels have been convened over 40 years to specifically address the lack of progress in Reading/English-LA achievement (Anderson et al, 1985; National Research Council, 1998; National Reading Panel, 2000; National Research Council, 2000; RRSF, 2002; Pearson & Cervetti, 2015). A consensus emerged in these reports that early

Reading/English-LA instruction needed to proceed by developing skills in five areas: phonics, phonemic awareness, vocabulary, reading comprehension and fluency. However, while there is currently little disagreement on whether and how to teach phonics, phonemic awareness and vocabulary, there is much uncertainty and intense debate on the best approaches to improving a student's comprehension and fluency of what they read. Comprehending what is heard and read is a complex cognitive process that lies at the heart of learning, yet is still not well understood.

In the last 30 years, two approaches to improving reading comprehension have been articulated. The first approach assumes that students primarily need a learned set of "procedural skills" that enable comprehension of what is read. These "procedural skills" are learned by students during their Reading/English-LA instruction that presumably allow them to comprehend what they read. This "procedural skills" based approach to reading comprehension has been a major focus of the national and select panels recommending educational policy and classroom practice during the period of time allocated to Reading/English-LA instruction for forty years.

A second approach to improving reading comprehension assumes that building a stronger base of previously stored General Knowledge allows better comprehension (Hirsh et al, 1988, Hirsch, 2003, Hirsch, 2006; Willingham, 2006, Hirsch, 2011; Willingham and Lovette, 2014; Willingham, 2017, Willingham and Riener, 2019; Cabell and Hwang, 2020; Hwang & Duke, 2020). However, the approaches and methods to building a stronger base of General Knowledge are much more complex, less understood and more difficult to measure than implementing the "procedural skills" approach.

For instance, building a stronger base of General Knowledge can involve changing out-of-school environments from birth and during early schooling and also can involve a multi-year, multi-grade effort during schooling that starts at kindergarten and requires more exposure to subjects that build General Knowledge- typically more time spent on Science and Social Sciences. While the reading and select panels have acknowledged the need to build a stronger base of General Knowledge, none of the panels suggested the more comprehensive curriculum changes required to accomplish this.

One of the reasons that long term Mathematics gains may be much greater than Reading/English-LA is that Mathematics requires a much more limited and well defined amount of background knowledge that can be provided in earlier mathematics instruction, and except for word problems, does not require a wide ranging amount of General Knowledge. Comprehending

the wide-ranging texts that are used in Reading/English-LA often requires a breadth and depth of General Knowledge about a wide range of domains of knowledge. Unlike Mathematics, the General Knowledge required to comprehend these diverse texts can encompass virtually any of the domains of knowledge that typical students experience in school or in their out of school environment. And, unlike Mathematics, it seems likely that a significant part of their capacity for comprehending Reading/English-LA texts relies on General Knowledge acquired out of school and before students enter school in their family and community environment. Thus, the origin of the often repeated ideas that Mathematics is more school dependent, whereas Reading/English-LA is more widely dependent on out-of- school environments.

Significant long term improvements in Reading/English-LA achievement similar to gains in Mathematics achievement would have required a much more comprehensive strategy than simply improving the quality of instruction during the time spent on Reading/English teaching improved “procedural skills”. Over the last 30-40 years, there has been little change in the time spent teaching different subjects. The time spent on different subjects in elementary grades in public schools shows the largest time spent on Reading/English-LA (10.5 to 11.6 hours) weekly followed by Mathematics (4.9 to 5.7 hours) with much less time on Science (2.8 hours) and Social Science (2.9 hours) and this pattern shows little variation across public schools with different student populations and has changed little over the last 30 years (Morton, B., & Dalton, B., 2007; Hoyer, K., M., & Sparks, D., 2017; Perie et al, 1997).

This data would suggest the absence of any long term widespread curriculum strategy to increase Reading/English-LA achievement nationally by placing increased emphasis on subjects that build General Knowledge. The small gains (7 percentile points) that have occurred in 4th and 8th grade Reading/English-LA over the last 30-40 years may be accounted for by improving the early skills involved in phonics, phonemic awareness and vocabulary and improving the “procedural skills” approach to improving comprehension. However, there has been no large scale, long term experimental evidence that provides support for the current reading curriculum using the “procedural skills” approach. A few experimentally designed interventions have been implemented for periods of 1-3 years with typically significant small or null effects on standard measures of reading comprehension (Conor et al, 2013, Kim, et al., 2021; Kim et al., 2023). However, no longer term follow-up measures were collected.

Recent Reading Panels convened to address the lack of progress in improving Reading/English-LA achievement have increasingly pointed to the need to address the more complex issue of building General Knowledge through “knowledge-rich” curriculum, but have not suggested the more basic structural curriculum reforms across grades and subjects that might be needed (Pearson et al, 2020). Wexler, 2019 provides a compelling case for such knowledge-rich curriculum and is a leading advocate (Wexler, 2018; Wexler, 2022). Several states have recently developed a variety of approaches to address the “Science of Reading” problem (Schwartz, 2022; Schwartz, 2021a; Schwartz, 2021b). However, the conceptual basis for the building of General Knowledge as well as a curriculum designed to build General Knowledge pre-dates current interest by three decades.

E. D. Hirsch—the leading long term proponent of the knowledge-based approach—led a research and consensus-building effort in the late 1980’s to develop a comprehensive curriculum directed at building students “cumulative General Knowledge” of the world they live in. This “knowledge-based” curriculum (The Core Knowledge curriculum) included all subjects (language arts, history and geography, mathematics, science, music, and visual arts) and all K-8 grades (Core Knowledge Foundation, 2010). Since its inception, the Core Knowledge foundation has produced teacher instructional manuals for all subjects and K-8 grades and offered professional development support for teachers, and the curriculum has been implemented in hundreds of schools nationally (Core Knowledge Foundation, 2010). Despite its presence for over 25 years in hundreds of schools nationwide, there have been no experimental evaluations of schools teaching the Core Knowledge curriculum.

This study utilizes an experimental approach through a kindergarten-based lottery to assess the long term effects (after 4-7 years of intervention from K to 3rd-6th grade) on Reading/English-LA, Science and Mathematics achievement in Charter schools teaching the Core Knowledge curriculum (CK-Charter). This evaluation is also the first to assess effects of a Reading/English-LA intervention using a kindergarten lottery that includes predominately middle/high income students. A new methodology addresses two sources of bias inherent in kindergarten lotteries that include middle/high income families.

Fourteen oversubscribed kindergarten lotteries for enrollment in nine CK-Charter schools using the K-8 Core Knowledge curriculum had 2360 students applying from parents in predominantly middle/high income school districts. State achievement data was collected at 3rd-

6th grade in English Proficiency and Mathematics and at 5th Grade in Science, and “intent to treat” (ITT) and “treatment of the treated” (TOT) effects estimated.

The confirmatory Reading-English-LA results show statistically significant ITT (0.241***) and TOT (0.473***) effects for combined 3rd-6th grade achievement with statistically significant ITT and TOT effects at each 3rd-6th grade. Exploratory analyses also showed significant ITT (0.15*) and TOT (0.300*) effects at 5th grade in Science and positive, but insignificant effects in 3rd-6th grade Mathematics. A CK-Charter school in a low income school district also had statistically significant moderate to large ITT and TOT effects in English Language Arts (ITT= 1.089**; TOT = 1.737**), Mathematics (ITT= 0.807*; TOT = 1.271*) and Science (ITT= 0.667*; TOT = 1.032*). These effects were large enough to close achievement gaps for disadvantaged students by 3rd-6th grade in all subjects measured.

The policy-relevant TOT effect size of 16 percentile points for all students equals the 40 year difference in gains between Mathematics and Reading/English-LA. The size of these gains could also close the international gap in Reading/English-LA for U.S. students. U.S. students placed 15th among 50 countries taking the 2016 PIRLS 4th grade Reading/English test, but national student gains similar to gains in this intervention would place the U.S. among the top five countries (PIRLS, 2016; Mullis et al, 2017).

The characteristics of this intervention as well as the results are atypical in the intervention research literature involving RCTs to improve Reading/English-LA achievement. Interventions in Reading/English-LA typically report null to small size, short term effects when standardized outcome measures of Reading/English-LA are used with declining effects whenever longer term outcomes are measured (Kraft, 2020; Bailey, 2017). The atypical moderate size, statistically significant TOT effects in this intervention for students from all family income groups together with the much larger, statistically significant TOT effects for a lower income CK-Charter school may be due to several aspects of the intervention that are also atypical.

These include an intervention that was implemented from K-6 providing at least 4 years and up to 7 years of dosage to students. Perhaps more importantly, the intervention changed not only the instruction in Reading/English-LA, but changed the emphasis and coordination of the instruction across all subjects and grades to increase a student’s General Knowledge of the world (Hirsch, 2011; Hirsch 2019). Teachers in the Core Knowledge schools utilized completely different instructional material across all subjects and grades and implemented different

classroom methods such as read-alouds (Core Knowledge Foundation, 2010). From this perspective, the intervention changed instruction and teacher preparation across all subjects and grades for up to 7 years. No Reading/English-LA intervention has been designed to have such a potentially comprehensive and long term effect on student achievement. Nagy, 2005 suggests that only long term and comprehensive interventions can be expected to improve long term measures of reading comprehension.

Students exposed to a curriculum that is aligned across grades and subjects such as Core Knowledge may bring greater efficiency from building on knowledge learned in previous grades and avoiding unnecessary content repetition (Engel et al., 2013). This kind of integration and focus across all grades and subjects is not typically prioritized in schools or school districts or states where, typically, two subjects (Mathematics and Reading/English-LA) are given the highest priority and little integration occurs across all subjects.

The level of General Knowledge is highly positively correlated with the more traditional measures of SES, parental education and income. However, unlike these measures, General Knowledge is malleable and can be increased with interventions and can be targeted to students with lower levels. Perhaps the most intriguing result from this study is that the K-6 intervention implemented in a single low income school had effects that eliminated achievement gaps at 3rd-6th grade in Reading/English-LA, Science and Mathematics. If these results replicate, early interventions that build General Knowledge may be a new direction for eliminating achievement gaps across all subjects.

There has been substantial **non-experimental** evidence linking gains in measures of General Knowledge to later achievement in Reading/English-LA, Science and Mathematics (Claessens et al, 2009, Duncan et al, 2007; Duncan et al, 2020, Grissmer et al, 2010; Morgan et al, 2016). The experimental results in this study are very similar in magnitude and in their pattern across subjects with these non-experimental results. This evidence suggests that gains in General Knowledge would have a larger effect on future achievement than similar gains in the more widely studied non-cognitive skills including executive function, visuo-spatial/fine motor and socio-emotional skills (Grissmer & Eiseman, 2008; Grissmer, et al, 2010).

Together the experimental and non-experimental evidence linking the level of early General Knowledge to later achievement in Reading/English-LA, Science and Mathematics suggest that increasing General Knowledge should be an important area for future research. New research

initiatives need to assess experimental replication and explore causative mechanisms through collection of mixed methods data from classroom observations, surveys of teachers, parents and students.(Grissmer, 2017). If future research supports these findings and the underlying theory, there are significant long term implications for the direction of educational and social science research and policy.

Federal data collections are designed to monitor and better understand the most important economic, educational, and social trends in society. Educational policies over decades have considered increasing achievement in Mathematics and Reading/English-LA to be the primary building blocks for later achievement and positive educational outcomes, and are among the primary early predictors for a range of later outcomes in life. Achievement in Mathematics and Reading/English-LA are also the primary current measures used to evaluate and compare the effectiveness and quality of schools and teachers. For these reasons, early achievement levels in Mathematics and Reading/English-LA are tracked at national, state and local testing levels.

This paper has suggested that the primary measures currently collected to monitor education including measures of Mathematics and Reading/English-LA (as well as other subjects) do not capture an important aspect of learning, namely, the level of General Knowledge. Well-designed measures of General Knowledge should be considered as an important addition to our routinely collected national measures for students in elementary grades. However, designing nationally collected measures of General Knowledge will pose a substantial challenge for researchers and policymakers, not unlike the challenge of measuring the Gross National Product as an economic indicator.

However, measures of General Knowledge will carry an additional challenge. Characterizing and measuring the General Knowledge that young students have in lower elementary grades will need not only scientific validity, but also political viability. Adults will offer different judgments as to which General Knowledge matters most for students, and that will undoubtedly trigger debates and a variety of viewpoints. But characterizing the General Knowledge that is needed to better understand the books actually read by children and the textbooks used in future education seems essential to educational efficiency and meeting long term educational goals.

To some extent, common ground may be established by taking an empirical approach that seeks to link the gains in early General Knowledge (however defined) to later rising achievement. Whatever the method to make the decision, it's important to remember that the

decision cannot be avoided. Making no active decision about curriculum—that is, doing nothing—is still a choice, but it’s a choice that means students may not have the option of a knowledge-rich, logically sequenced curriculum and the nation may miss the opportunity to have a better educated future work force.

The implications of raising long term Reading/English-LA achievement by an average of 16 percentile points for a sample of students across all income levels and closing achievement gaps for low income students carries implications for possible wider and longer term effects. The achievement gains in this study, if mediated through increased reading and verbal comprehension due to General Knowledge, would suggest that future achievement gains might also occur in later schooling across all subjects that require increasing reading and verbal comprehension- virtually all subjects to different degrees. Students that carry higher levels of verbal and reading comprehension into later schooling might be expected to have higher achievement across a range of subjects, have higher educational attainment, increases in high school completion, college entrance and years of education as well as higher wages and labor force productivity.

A significant weakness in previous research and theory may be embedded in the theory and language involving human capital that places the emphasis on “skill building” as the primary developmental cognitive process involved in learning (Bailey et al, 2017). This theory characterizes development as the process of building increasingly complex skills summarized in the phrase “skill begets skill” (Heckman, 2006). The results of this study would suggest that there are two separate but complementary, cognitive processes involved in development and learning: “skill building” and “knowledge accumulation”. Perhaps the phrases that better capture cognitive development would be- “skill begets skill; knowledge begets knowledge; and almost certainly- skill x knowledge begets skill x knowledge”.

However, the results from a single intervention and evaluation can never provide sufficient evidence for achieving a new longer term research or policy consensus among researchers or policymakers or for understanding of the causative mechanisms. Rather the implications of these results should primarily initiate a large new research and policy agenda directed to replication as well as research that identifies and leads to better understanding of the causative mechanisms and theory involved in the Core Knowledge curriculum. In the long term, it is stronger theories and

increased understanding of the causative mechanisms that predict the results of new experimental evidence that moves science forward.

Background

This study takes advantage of two large-scale interventions in U.S. education directed at improving student achievement: charter schools and the Core Knowledge K-8 curricular design. Charter schools enrolled 3.4 million students in school year 2019-2020- over 5% of students in public schools nationwide (Digest of Educational Statistics, 2021). In 2019, there were approximately 1700 pre-K-8th public schools- about 2.5% of public schools- using the Core Knowledge K-8 curriculum (Core Knowledge Foundation, personal communication).

This study incorporates data from 14 kindergarten lotteries from 9 oversubscribed Charter schools teaching the Core Knowledge curriculum (CK-Charter) to provide the first experimental evidence for the long term achievement effects (3rd to 6th grade) of the Core Knowledge curriculum. To interpret the results of this study, it is important to understand the rationale and previous research findings underlying both the Core Knowledge curriculum and Charter schools.

Charter Schools - Rationale

Charter schools are publicly funded but granted more autonomy than traditional public schools in shaping major decisions about how to educate students. There are four rationales for granting such flexibility. First, public schools were constrained by a political and bureaucratic process more influenced by local, state, and federal requirements (Chubb & Moe, 1990). Granting charters greater flexibility in choosing policies and curriculum was expected to lead to a more diverse set of schools that could be evaluated for improving student outcomes. The charter school movement has focused on improving three aspects of schools: autonomy, innovation, and accountability. Advocates for charter schools argue that these aspects of reform will produce organizational innovations which in turn will lead to better student outcomes (Chubb & Moe, 1990; Walberg & Bast, 2003).

The second rationale for charter schools is to offer parents a wider variety of schools, enabling them to select one that fits the developmental needs of their children (Betts, 2005). Practices and conditions related to autonomy, innovation, and accountability are expected to differ across schools (and school types) in response to parental and community preferences, further promoting student achievement (Walberg, 2011). The third rationale is that an evolving competitive process between public and charter schools would lead to improvements in both charter and public schools and in student achievement (Betts, 2005; Hoxby, 2001, 2003).

The fourth rationale for charter schools is to promote their potential as incubators of innovation, experimenting with different school policies and organization, curriculum, and pedagogical practices (Nathan, 1999), which could be more rigorously evaluated using the random lottery selection process often mandated for over-subscribed charter schools (Hoxby & Murarka, 2008). Such evaluations could identify specific interventions that raise achievement, and these interventions could then be adapted to improve both charter and public schools. This study is made possible by the flexibility given to Charter schools who implemented the Core Knowledge curriculum and allows the experimental measurement of the effects of Charter Schools teaching the Core Knowledge curriculum.

Charter Schools - Empirical Evidence for Impacts

The advent and rapid growth of charter schools has been accompanied by a voluminous research literature to assess whether charter schools are achieving the envisioned outcomes. There have been several reviews or meta-analyses of this literature that have been done at different points in time as well as large scale studies that inform our literature review, as do the original studies covered by these reviews (Buddin & Zimmer, 2003; Bifulco & Ladd, 2006; Sass, 2006; Zimmer, et al., 2011; Baude, Casey, Hanushek, & Rivkin, 2013; CREDO, 2009, 2011, 2013; Clark, Gleason, Tuttle, 2015; Berends, 2015; Cheng et al., 2017; Epple et al., 2016; Chabrier et al., 2016; Gamoran & Fernandez, 2018; Austin & Berends, 2018, 2020; Betts & Tang, 2019; Ferrare, 2020; Zimmer et al., 2020; Cohodes and Parham, 2021; Zimmer, Buddin, Smith, and Duffy, 2020).

Overall, these studies reach no consensus on the key question of whether charter schools produce higher achievement than public schools, but rather show a mix of positive and negative differences. This evidence suggests that simply freeing public schools from their perceived bureaucratic constraints through charter schools does not reliably produce higher achievement. However, Berends (2015, 2020, in press) suggests that asking whether typical charter schools can outperform public schools may be the wrong question. There is a large amount of variability among both charter schools and non-charter public schools in both educational policies, pedagogical practices, and student/family characteristics. Instead, the question is whether there are conditions under which charter schools consistently outperform non-charter public schools, and whether the conditions causing these differences reside primarily in innovative charter school practices or the characteristics of non-charter public schools.

The research has suggested that Charter schools have distinct advantages over non-charter public school counterfactuals located in inner city schools, but not for suburban schools. In Massachusetts, charter schools in inner city, urban districts have consistent, small-to-moderate positive effects on reading and math, while charter schools in suburban school districts show no effects (Angrist, Pathak, & Walters, 2013). A series of CREDO city analyses show fairly consistent results of small to very large statistically significant achievement gains in math and reading in inner city charter schools over non-charter inner city public schools, but no consistent evidence for achievement gains outside of inner cities (Center for Research on Education Outcomes, 2013). Gleason, Clark, Tuttle & Dwoyer's (2010) lottery-based evaluation of charter school impacts included 36 middle schools across 15 states located in both inner city and suburban areas (see also Clark et al., 2015). Gleason et al. found no overall significant impacts on math or reading test scores. However, consistent with the findings of Angrist et al. (2013), schools in large urban areas had statistically significant positive effects on math (+0.16 SD), whereas schools outside urban regions had statistically significant negative effects (- 0.14 SD). Cohodes and Parham, 2021 suggest that charter schools may outperform public schools in certain urban school districts, but there is no consistent evidence for charter schools outperforming public schools outside of the inner city.

A few studies have measured what happens inside charter schools outside the inner city. Their results shed light on why particular kinds of charter schools might be more effective (Hess & Loveless, 2005; Zimmer & Buddin, 2007; Berends, Watral, Teasley, & Nicotera, 2008; Betts et al., 2006; Berends et al., 2010, 2019; Berends, 2015, 2020; Zimmer et al., 2020). For example, research from Texas charter schools using quasi-experimental methods suggests that charter schools in operation longer tend to show stronger effects, and the overall effectiveness of charter schools seems to improve over time from the combination of more years of operation and other schools' exits from the market (Baude, Casey, Hanushek, & Rivkin, 2014).

Charter schools outside the inner city have often been designed as "test-beds" for identifying policies and curriculum that, if successful, could be implemented more broadly in charter and public schools (Betts & Tang, 2019). A movement to implement and financially support groups of charter schools (Educational Management Organizations (EMO); Charter Management Organization (CMO) with similar policies is spreading within and across states (Farrell, Wohlstetter, & Smith, 2013; Berends, in press).

Dynarski et al. (2018) used a lottery-based design to examine the effects of a large for-profit set of schools (EMO-National Heritage Academy) on student achievement. Using lotteries from 44 schools in Michigan between 2003 and 2014, they estimated the impacts on achievement for the EMO National Heritage Academy. They found that attending a National Heritage Academy charter school resulted in a 0.04 SD gain in mathematics; effects on other outcomes like reading, attendance, grade progression, disciplinary actions, and special education placement were not significant. Heterogeneous effects also occurred among non-profit Charter Management Organizations that estimated effects for 22 middle schools (Furgeson et al. (2012)). Results showed more positive than negative effects with substantial variation in each direction.

Overall, this literature supports three main conclusions:

Charter schools in urban school districts show consistent, statistically significant gains in Reading/English-LA and Mathematics over their inner-city traditional public counterfactuals with ITT effect sizes that range from small to moderate.

Typical charter schools in non-urban school districts show no consistent, significant effects for higher achievement than traditional public schools in Reading/English-LA and Mathematics at the elementary, middle, or high school level. Almost all studies involving large samples of similar traditional public and charter schools have shown a large variance in results, from significant negative to positive results.

Evaluation of instructional designs for charter schools outside of inner cities is an important avenue for future research to extend our knowledge base (Berends & Dallavis, 2020). However, this research requires starting or finding a large enough sample of charter schools with similar instructional design to provide the needed lottery data.

In this context, the current study takes advantage of the large number of charter schools teaching the Core Knowledge curriculum in Colorado. CK-Charter schools were started in the 1990s and their popularity spread such that by 2012 there were more than 50 CK-Charter schools in Colorado. Many of these schools were oversubscribed mandating kindergarten lotteries for admission. This study utilizes data from 14 oversubscribed school lotteries in 9 CK-Charter schools to generate experimental evidence about the long term achievement effects (3rd - 6th grade) of Charter schools using the Core Knowledge K-8 instructional design and curriculum.

Core Knowledge Charter Schools

CK-Charter schools were first implemented in Colorado in the early 1990s and have grown steadily to over 50 of these schools in Colorado. We identified schools with a history of excess enrollment demand and associated use of kindergarten lotteries for admission. We offered \$1000 for each year of participation in the study. We prospectively tracked lotteries for one or two entry cohorts in these schools. Some of these lotteries were eliminated because they made offers to all applicants, leaving the 14 CK-Charter lotteries in 9 schools with excess demand.

All schools in the study had been in operation for a minimum of four years and up to 14 years when the study began. We tracked each lottery and lottery outcome prospectively at each school at least two months before the lottery until one month after kindergarten entry to provide internal validity of the study. Each school developed a spreadsheet with applicant information that also tracked email and phone communication with lottery applicants. The information on each student included first and last name, lottery number, and the timing of any offer and acceptance/rejection of offers. Eleven of the lotteries included data on birth date—about 75% of applicants. Most lotteries included gender- and using software that assigns gender from first names- gender was identified for applicants in lotteries not having gender information, resulting in gender missing on only 3% of applicants with androgynous names.

Core Knowledge Curriculum

The Core Knowledge curriculum takes an unconventional approach to improving achievement. It uses a comprehensive approach to specifying curriculum in every subject (Language Arts, Mathematics, Science, History, Geography, Visual Arts and Music) at each K-8 grade (Core Knowledge, 2010). The curriculum is designed to build students' cumulative General Knowledge and their range and depth of vocabulary to boost their capacity to comprehend the world they live in (Hirsch, 1988, 2003, 2006, 2011). General knowledge comprises content about people, objects in the world, facts and meanings of words, and associations among these entities. The curriculum is controversial because it suggests that student's Reading/English-LA and Science achievement in later grades may depend not only on the quality of direct instruction in these subjects but on the content and quality of curriculum outside of these subjects.

The Core Knowledge curriculum has early and continuing emphases on: (a) following a planned sequence of specific topics that integrates knowledge from the seven subject areas

across K-8 grades to systematically build their knowledge and comprehension of the world; (b) exposing children to broad, information-rich curricula across subjects to build oral vocabulary; and (c) using read-alouds to build oral vocabulary, knowledge, and listening skills (Core Knowledge, 2010). Throughout this study Core Knowledge had a K-8 integrated set of teacher manuals for the specific topics in each year, as well as associated student reading materials (Core Knowledge, 2010), and it offered access to aligned lesson plans from a variety of authors. The Core Knowledge foundation also provided professional development and support opportunities for teachers and principals across the nation.

Research on General Knowledge in Learning

Measures of General Knowledge have not typically been included in major longitudinal data that are used to study factors that influence achievement from early grades. However, the 1998 Early Childhood Longitudinal Survey (ECLS-K) that tracked students from kindergarten to 5th and 8th grade collected family and student characteristics as well as a range of early cognitive measures including early reading and math skills along with executive function (attention), visuo-spatial/fine motor skills, socio-emotional skills and General Knowledge prior to kindergarten entry. Duncan et al, 2007 utilized this data in combination with international longitudinal data sets having measures of executive function to estimate significant effects from measures of executive function on 5th grade Mathematics and Reading/English-LA achievement. Grissmer et al, 2010 and Murrah, 2010 utilized the ECLS-K to predict 5th and 8th grade Mathematics, Reading/English-LA and Science achievement that added variables for visuo-spatial/motor skills and the level of General Knowledge. Figure 2 shows the relative significance of the predictors for 5th grade Math, English and Science.

Fifth grade math is most strongly predicted by early domain specific Mathematics skills, followed by level of General Knowledge, and reduced, but still significant impacts from executive function and visuo-spatial/fine motor skills. Fifth grade Reading/English-LA and Science is most strongly predicted by the level of General Knowledge followed by early Mathematics, executive function and visuo-spatial/fine motor skills. The variable that would have the largest cumulative impact across later subjects is the early level of General Knowledge. These non-experimental results suggest that early General Knowledge acquisition may be as critical to long term achievement as the more well-studied early skills in Mathematics and Reading/English-LA, executive function and visuo-spatial/motor skills. Despite this empirical

evidence for the role of General Knowledge in predicting later achievement, a consensus in educational research on its importance, its measurement or a theory specifying its role in cognitive development has been slow in developing.

Early General Knowledge can emerge informally through everyday interactions and experiences, conversations with peers, teachers, parents and other adults, as well as through more prescriptive activities such as travel, reading books and visits to museums (National Research Council, 2009). By the time children enter school they may have considerable prior General Knowledge gained from early childhood environments (National Research Council, 2007). Once in school, students with high prior knowledge tend to learn course content better than those with low prior knowledge (Steinkamp & Maehr, 1983; Tobias, 1994).

The link between General Knowledge and later achievement may operate through improvements in reading comprehension as well as improvements in motivation to learn. The systematic building of General Knowledge has been long identified as an important component in building skills needed for reading and verbal comprehension (Hirsch, 2003, 2006; RRSF, 2002; National Research Council, 2000, 2007, 2009; Pearson, P.D, et al, 2020).

For instance, according to many contemporary theories of comprehension, the reader may construct a “situation model” integrating relevant prior knowledge with a “textbase” or mental representation of the meanings of the words and sentences in the text (Graesser, Singer, & Trabasso, 1994; Kintsch, 1998; Zwaan & Radvansky, 1998). The situation model enables the reader to fill in gaps and unstated ideas in the text, disambiguate the meaning of words and sentences, integrate information across sentences, and make inferences. Readers who lack prior General Knowledge often fail to fill in conceptual gaps within texts and fail to make inferences that go beyond information that is explicitly stated in the text (e.g., Beck et al, 1991; Voss & Silfies, 1996), even when they receive training in comprehension strategies (McNamara, 2004).

The effects of prior General Knowledge on reading comprehension are also revealed in studies of adults and children who are (a) high or low on measures of knowledge or expertise in a domain and (b) high or low on measures of reading skill or general cognitive ability (Adams, Bell, & Perfetti, 1995; Recht & Leslie, 1988; Schneider, Korkel, & Weinert, 1989; Walker, 1987). These studies show that prior knowledge can compensate for low reading skill or cognitive ability. For example, 3rd, 5th, and 7th graders with high levels of knowledge about a

topic but low performance score better on comprehension posttests than high-performance novices, and third-grade experts outperform fifth-grade novices (Schneider et al., 1989).

Reading/English-LA, Mathematics and Science at later grades may demand increasing student contextual understanding of their physical and social world. The National Council of Teachers of Mathematics advocates for students to understand the practical, real-world applications of mathematics in order to best learn mathematical concepts (National Council of Teachers of Mathematics, 2000). Also, word problems in mathematics often demand comprehension of the world. Further, having extensive prior knowledge may aid in developing higher order cognitive skills, such as mathematical and scientific reasoning, since such processes are thought to require a combination of content General Knowledge and process skills (Zimmerman, 2000).

Improved verbal and reading comprehension may also increase student motivation. Expectancy value theory posits that students have increased motivation when they see the value of what is learned for their everyday lives (Wigfield & Eccles, 2000). Increased General Knowledge can impact student motivation by enabling students to make connections between their personal lives and academic subject knowledge. Such connections are the foundation of inquiry-based education, and serve as a foundation for both interest and knowledge development (Renninger & Hidi, 2011; National Research Council, 2000). Research demonstrates that students' perceived utility value of academic course content is closely related to achievement, engagement, interest, and to perceived utility in their lives (Hulleman et al., 2010; Hulleman & Harackiewicz, 2009). For instance, when students write essays linking science learned in school to their lives, students showed increased interest in taking more science courses and overall grades in their science class.

A final source of empirical evidence on the effect of General Knowledge on achievement comes from the psychological literature- the Cattell-Horn-Carroll (CHC) theory- that identifies the differences in cognitive characteristics between higher and lower scoring students. One of the most important characteristics identified that is hypothesized to explain these differences is the level of General Knowledge defined as "the student's knowledge about the world that they live in" (Evans et al, 2002; Zaboski et al, 2018).

The Core Knowledge theory of action suggests that students from middle/high income families present a stringent test for the Core Knowledge curriculum for three reasons. First, these advantaged children typically have family environments that have provided wide exposure to

vocabulary and sources of General Knowledge (Lareau, 2011). Second, these middle/high income parents who lose the lottery have access to a wide range of high quality public, charter, private and home schooling alternatives (Murnane and Riordan, 2018; Lareau & Goyette, 2014). Third, previous research on charter schools has found no consistent impacts for charter schools in middle/high income school districts. Thus, it may be difficult for middle/high income students in Core Knowledge charter schools to show achievement gains above those in control schools. The range of school and family characteristics in our study from very high income suburban school districts to a school in a low income district enables a test of whether Core Knowledge charter schools are effective for a wide range of family income levels.

Research on Effects of the Core Knowledge Curriculum

Existing research on the effects of Core Knowledge is limited in several ways. There are no experimental studies. The few quasi-experimental studies have been conducted under conditions of partial or early implementation, and the sample sizes have been relatively small with a wide variance in results. Datnow et al. (2003) compared the standardized test performance of fourth grade students in two urban Core Knowledge schools and two matched comparison schools and found no difference in reading achievement. Taylor compared scores on the Iowa Tests of Basic Skills for more than 300 matched pairs of Core Knowledge and non-Core Knowledge students in Grades 3-5 in an urban school district with statistically significant effects across several subtests including reading comprehension ($d = +.17$) (Richards, O. H. (2001).

Datnow, Borman, and Stringfield (2000) examined achievement outcomes for two student cohorts in four Core Knowledge schools in four states. Each Core Knowledge school had a within-district, demographically matched non-Core Knowledge comparison school. Results on norm-referenced test of reading achievement showed no effects. However, using classroom observations, they found evidence for wide variance in implementation, and adjustments showed Core Knowledge had positive effects on norm-references reading. Borman et al. (2003) reported a mean effect size of +0.03 for six studies of Core Knowledge, combining results for reading, math, and other subjects. However, the results also appeared to be sensitive to fidelity and years of implementation.

Our study has many unique aspects that extend the current research on both the Core Knowledge curriculum, Charter schools and research on educational interventions. It is the first study to provide experimental evidence about the Core Knowledge curriculum. Second, schools

were located predominantly in middle/high income school districts, whereas most intervention research using lotteries focused on urban, inner city schools (Betts & Tang, 2019). Third, almost all educational intervention research has focused on interventions lasting for shorter time periods than 4-7 years. Fourth, interventions using lotteries have focused more on lotteries at later elementary, middle, or high school and measured impacts over shorter time periods. This focus on later grades may underestimate the impact of charters since research suggests that early interventions may be more effective than later interventions (Heckman, et al, 2006; Cunha and Heckman, 2007). Fifth, the Reading/English-LA achievement test (Partnership for Assessment of Readiness for College and Career) has a combined achievement score that includes both a reading and writing component with achievement scores available from 3rd-6th grade.

DATA

School Sample and Characteristics

Nine CK-Charter schools participated in the study. Five of the schools participated in consecutive lotteries for kindergarten entrance in school years 2009-2010 and 2010-2011. Four schools participated in only one lottery to provide a total of 14 lotteries for analysis. The nine schools were located in six school districts that stretched from the Denver area to northern districts including Loveland and Ft. Collins.

Table 1 shows the characteristics of the schools and their school districts. Six of the schools are in the Denver-Aurora-Lakewood SMSA that includes 10 counties around Denver. Four of these schools are in very high income suburbs of Denver in the Douglas county school district. Two schools were northwest of Denver in middle-income Jefferson County and Littleton school districts, and one school is in Aurora- a low income, urban school district east of Denver. Three schools are outside of the Denver SMSA in northern Colorado near Loveland and Ft Collins in the Thompson and Pourde school districts. The study schools vary in size having 2016 K-8 enrollments ranged from 466 to 2359.

Table 1 also shows the school district median family income (2010) and percentage of families with children below the poverty level. Three schools in the Douglas school district have a median family income of \$114,233, while five schools are in districts with median income from \$92,137 to \$75,105. The median family income in these districts is above the Colorado median income (\$74,000) and also the national median income (\$64,000). One school in the

lower income Adams-Arapahoe school district near Denver has a median income of \$51,424, with 28.8% of families under the poverty level. This school participated in only one lottery, leaving 13 of our 14 lotteries in middle to high income school districts.

Lottery Samples and Characteristics

The lotteries at each school occurred in the December to February window prior to kindergarten enrollment in September. Each lottery was monitored to ensure adherence to randomization and until enrollment in kindergarten could be verified. Matching all lottery applicants using first and last names across 14 lotteries revealed that some students applied to more than one of the 14 lotteries. Almost all of those applying to more than one lottery applied to two or more schools for kindergarten entry in the same year, while some made applications in two consecutive years for kindergarten entry. The former group lived in catchment areas where more than one of our schools allowed multiple applications. The latter were in schools participating in consecutive lotteries who applied and lost the first lottery, and delayed kindergarten entry and reapplied in a lottery in the next year. We treat these two groups differently in the analysis and use the term “multiple applier” only to the former group, while referring to the latter group as “delayed entrants or red-shirts”.

We estimated the effects of the intervention for single appliers and for the larger sample including all lottery applications from single and multiple appliers (“all-applications”). As shown in Table 2, there were 2853 applications across all 14 lotteries submitted by 2310 students. The student sample of single appliers is 1831 or 79.3% of all students, while 479 or 20.7% of students submitted more than one application. Of the 2853 applications, 1831 or 64.2% were from single appliers, while 35.8% were from multiple appliers.

Table 3 summarizes the lottery outcomes for the all-applications and single-applier samples. For single appliers, 37.6% were lottery winners. Across all-applications, 35.4% were winners, and 41.3% of all students won at least one lottery. Table 4 shows the lottery characteristics and lottery outcomes for the “all-applications” sample for each of the 14 lotteries. Overall, 35.4 % of the “all-applications” were lottery winners, and 47.0 % of applications resulted in enrollment leaving a 53.0 % rate of non-compliance (not enrolled) by lottery winners. The non-compliance for lottery losers who entered the lottery kindergarten after losing the lottery was very small, and was mainly due to being admitted under a sibling provision.

The lottery characteristics show wide variation across lotteries. The total lottery applications varied from 62 in lottery 5 to 397 in lottery 4, while the percentages winning the lottery varied from 13.5 % in lottery 13 to 76.8 % in lottery 11. Moreover, the percentage of winning applications that resulted in an enrollment varied from 29.7% in lottery 3 to 70.2% in lottery 2. The number of applications that resulted in an enrollment varied widely from 16 in lottery 5 & 14 to 71 in lottery 4. The diversity in the characteristics of the lotteries likely strengthens the generalizability of the results.

Table 5 presents the data on the two available co-variables (gender and age). Statistically significant differences between lottery winners and losers would imply potential bias in the randomization process. Two of the 14 lotteries (lottery 2 & 3) showed marginally significant differences in the gender distribution, while no lotteries showed any significant differences in the age distribution. This evidence suggests adherence to the randomization process.

Fidelity Data

To determine the extent to which the study schools were implementing the Core Knowledge curriculum, we reviewed school websites, surveyed and interviewed teachers and principals, and observed classrooms in kindergarten through third grade. Key findings were as follows:

- 100% of the teachers reported that Core Knowledge (CK) will “definitely” be a major element in their school’s curriculum in the next several years.
- 100% of teachers reported having a copy of the CK teacher handbook in their grade.
- Depending on the subject, between 86% and 95% of the teachers reported that they planned to teach “all or almost all” of the topics in the Core Knowledge Sequence.
- 91% of the teachers participated in a professional development workshop conducted by the Core Knowledge Foundation.
- Principal interviews suggested that the teachers were enthusiastic about teaching the CK curriculum.
- Based on the 15-minute classroom observations by an expert on Core Knowledge implementation was rated as medium to very high, and the percentage of the curriculum being implemented was between 80-100%.

The evidence suggests that teachers were adhering to the curriculum as developed by the Core Knowledge Foundation, and that students were being exposed to the curriculum’s knowledge and concepts.

Achievement Data

Achievement data in Reading/English-LA and Mathematics from 3rd, 4th, 5th and 6th grades comes from Colorado state-wide PARCC (Partnership for Assessment of Readiness for College and Careers) tests. The PARCC tests were a multi-state effort that built new tests to measure how well students are learning the Common Core standards. The Common Core Standards and associated PARCC tests are designed to test complex “critical thinking” skills. The PARCC English-LA test contains a reading/literacy component as well as a writing component. Scores are combined into one overall score. The Science test is only given at 5th grade and is designed by CTB/McGraw-Hill.

The PARCC Reading/English-LA and Mathematics tests were implemented in Colorado in the 2015-16 school year. Six of our lotteries were in 3rd grade before the change to PARCC tests, and took an older Colorado Transitional Assessment Program (TCAP) given from 2012-2014 in Reading, Math and Writing that was developed by the Colorado Department of Education and CTB/McGraw-Hill. We have eliminated this 3rd grade data for these six lotteries due to the absence of comparable 3rd grade achievement scores, but have comparable PARCC tests at 4th, 5th and 6th grade for these lotteries.

Research Questions

The confirmatory research question is:

- whether CK-Charter schools teaching the K-8 Core Knowledge curriculum have a long term positive and significant effect on 3rd, 4th, 5th and 6th grade English-LA achievement and combined 3rd-6th grade achievement.

The exploratory questions include:

- whether CK-Charter schools teaching the K-8 Core Knowledge curriculum have a long term positive and significant effect on 5th grade Science achievement and on 3rd, 4th, 5th and 6th grade Mathematics achievement and combined 3rd-6th grade Mathematics achievement.
- whether each of the estimated effects are positive and significant for females and males, and are there significant differences between genders?
- whether the ITT and TOT 3rd-6th grade effects show significance differences between a CK-Charter school in a low income school district and the remaining lotteries in middle/high income school districts

The exploratory research questions on Math and Science effects flow from both the underlying theory of the Core Knowledge curriculum and empirical work with the ECLS-K (Grissmer et al, 2010, Murrah, 2010). The exploratory questions concerning gender differences and differences by school district income level reflect the common finding of such differences in educational outcomes.

Attrition Data

Each lottery applicant's first and last name was used to search Colorado enrollment files to identify the Colorado identification code (CIC) for each student. This CIC code was then used to extract their Colorado state achievement scores for 3rd to 6th grade in Reading/English-LA and Mathematics and 5th grade Science. This matching process identified 7 categories of lottery applicants that were either missing achievement data or had achievement data from a different year than "On-Track" applicants and are all considered part of study attrition. These categories of attrition and the associated assumptions include the following:

- **"No Achievement Data"**-Applicants with no valid 3rd – 6th grade achievement data).
 - **"Attended Private/Home school"**- No enrollment data in K-6th grade
 - **"Moved Out of State/Transfer to Private/Home School"**- Partial or complete enrollment records from K-2nd but no enrollment data from 3rd-6th grade
- **"Not Tested Due to LEP/IEP Exclusion"**- applicants with a valid enrollment record in the 3rd-6th grade but having no achievement data at one of more grades).
- **"Off-Track"**- applicants with enrollment records, but with achievement data from *a year earlier or later* than their cohort
 - **"Skippers"**- applicants who skipped a grade between K-3rd grade.
 - **"Retained in Grade"**-applicants who started kindergarten with their cohort, but were retained in grade before 3rd grade
 - **"Delayed Entrants or Red-shirts"**-applicants who started kindergarten a year after their cohort.

Table 6 shows the overall attrition statistics by gender and lottery status for the all-applications" sample. The overall attrition rate for all 10349 applications from 3rd to 6th grade is 35.5%. Lottery winners (32.5%) have lower attrition than lottery losers (37.1%) and a statistically significant level of differential attrition (-4.6***). There are strong gender differences in attrition. Females have lower overall attrition rates (31.3%) than males (36.4%); and females have no significant level of differential attrition (-0.4). In contrast, male differential attrition is highly statistically significant (-7.2***). Significant attrition differences commonly

occur in RCTs by income or SES groups, but attrition differences between males and females is an unusual result.

The What Works Clearinghouse (WWC) provides guidelines for analyzing levels of overall and differential attrition to assess the potential risk for bias in results (What Works Clearing House, Standards Manual, 2020). These results suggest that any estimates using the full sample will have moderate bias risk. The male sample will have very high risk for bias, but estimates using the female sample have low bias risk.

Analytic Strategy for Estimating, Presenting and Interpreting Results

This intervention was registered in the Open Science registration in 2017-18 as part of receiving funding from the Arnold Foundation. The evaluation methodology registered at that time did not take account of the possibility of having high and significant levels of differential attrition and the associated bias. That is, the proposed methodology assumed no sources of bias linked to the estimates and proposed the standard RCT methodology for estimation of results. The framework makes researcher bias difficult by ensuring that the primary reported results follow a predetermined methodology using the entire sample. However, this framework does not work well when there is first time, unexpected sources of bias. The bias was unexpected since there were no previous kindergarten lottery evaluations including middle/high income parents. This was the first RCT to encounter this form of bias.

However, the new source of bias primarily affects the male sample. The male sample shows high and significant levels of differential attrition and the associated bias threat. However, the female sample shows no significant level of differential attrition and presents no bias threat. Thus we report all results by gender to highlight the stability of the female results across estimates and the rapid increase in male effects as the sources of differential attrition are eliminated.

Discussion of Analytical Issues

Addressing High and Significant Levels of Differential Attrition in the Male and Full Sample

This study is the first educational lottery analysis to report high levels of differential attrition with statistically significant levels for males and no significant effects for females. To identify potential bias on both the male and full samples linked to these attrition levels, we first examined the causes of this differential attrition. Our approach was twofold. First, we identified the

specific parental decisions made by middle/high income parents that could produce high levels of differential attrition. Second, we assessed whether the differential attrition was primarily confined to a few lotteries or particular subgroups that could be eliminated from the estimation.

The presence of high levels of differential attrition appears to be linked to the parental decision-making process in middle/high income school districts. This self-selected group of middle/high income parents who applied to CK-Charter lotteries have a complex decision process. They are choosing where and when to start children in kindergarten and whether to retain or advance students in early grades. There is a wide choice of schooling alternatives in middle/high income school districts in Colorado, especially in suburban areas. These include high-quality public non-charter schools, a variety of charter school types, sectarian and nonsectarian private schools, and home schooling. Colorado is also an open enrollment state, so parents can apply to any public school regardless of location.

Applicants commonly apply to multiple schools. Entering a lottery to a CK-Charter school suggests that parents prefer this alternative to at least one, and perhaps all of their other schooling options pursued. In addition to pursuing private schools or home schooling, these higher-income parents have the option to delay kindergarten entry by a year (red-shirt) and also chose to retain or advance students in a later grade.

In making these choices, parents are increasing attrition rates in our study. Colorado does not test students in private schools or home schools, and no achievement data is available. Students attending Colorado schools and taking achievement tests—but are red-shirted at kindergarten or retained or advanced in a grade from K-3rd—will not have comparable achievement data to “On-Track” students. Students who are delayed or retained or advanced in a grade take different achievement tests in different years and also experience a different intervention than the “On-Track” main sample, which enters kindergarten immediately after the lottery and proceeds from K-6th grade without interruption. Therefore, students who are delayed, retained, or advanced are also considered part of attrition. If these choices are different for lottery winners and losers, differential attrition and associated bias risk can result.

This bias risk appears to be unique to lotteries that include middle/high income parents and only for lotteries at kindergarten entry and only for male applicants. Lower-income parents do not have the option of delayed entry or private/home schooling due to the higher financial and non-financial costs of choosing private or home schooling and/or red-shirting students.

Middle/high income parents in lotteries at higher grades also do not have the option of delayed entry and are less likely to switch to private/home schooling at later grades. Finally, only the male sample shows significant levels of differential attrition.

Analyzing our enrollment and achievement files allows the differential attrition data to be displayed by three sources of attrition- “Off-Track,” “Not Tested,” and “Private/Home/Out of State”. “Off-Track” students have attended Colorado public schools but are in a different grade than their on-track peers and have no comparable achievement data. “Not Tested” students are enrolled in the appropriate grade, but not tested. These students could have been absent the day of the test due to parents that opted out of testing, or were excluded from testing for IEP or LEP reasons. “Private/Home/Out of State” students have no Colorado enrollment records or enrollment records that terminate before 3rd grade. These students are assumed to have enrolled in a private/home school at kindergarten or transferred at later grades or moved out of state.

Table 7 provides the attrition rates for lottery winners and lottery losers by gender for the three major sources of attrition. Females have no statistically significant levels of differential attrition for the Off-Track (1.8), Not Tested (-0.3), or Private/Home/Out of State sample (-1.7) or the entire female sample (-0.1). Therefore the estimated effects for females have no significant bias risk linked to differential attrition.

However, males have statistically significant differences in differential attrition for the Off-Track (-2.3*) and Private/Home/Out of State samples (-5.1**) and Total Sample (-7.2**), but not the “Not- Tested” sample (0.2). The percentage of male students not tested was 7.7%; 8.5% for females. This accounts for about 24% of all attrition. The absence of significant differential attrition for both genders for the “Not Tested” group implies that student absences and policies used to exclude students from testing on the day of the test do not correlate with lottery outcome. The results imply that CK-Charter schools and the public schools attended by students in our sample follow similar procedures in excluding students from testing. In addition, levels of student absences and student characteristics are similar across these schools.

Two other sources account for the differential attrition for males. Parents may decide to delay kindergarten entry or retain or advance a student in grade before 3rd grade. This places the student in the “Off-Track” group. Parents may also decide to use private/home school, either from kindergarten or later, or they might move out of state before 3rd grade.

These parental decisions have been studied in the literature. Bassock and Reardon, 2013, using a national sample, report that delayed entry (red-shirt) rates were about 3-5% of enrollments and rates were much higher for higher SES parents, twice as high for males than females, and much higher for younger students. The lower rate of red-shirting for females may indicate that males are behind females their age in kindergarten readiness measures. This result suggests that parents perceive similarly aged males as more problematic than females for school entry decisions (Chatterji, M. 2006; Ready et al, 2005; DiPrete, T. A., & Jennings, J. L. (2013). However, Bassock and Reardon, 2013, also suggest that parental assessment of readiness is more focused on males who are perceived to have marginal levels of readiness for kindergarten entry.

Huang, 2014 suggests that early grade retention is higher for males and strongly linked to being among the youngest at kindergarten entrance. This result suggests middle/higher income parents use grade retention as another strategy (in addition to red-shirting) to give a perceived long-term advantage to a student. The parental decision to advance a child in grade occurs less often than deciding to retain a child in grade. The evidence suggests that males and females have similar rates of grade advancement, which occurs mainly for older students.

Our Colorado enrollment data shows that red-shirting occurred in our sample of middle/high income parents with 5.9 % of males and 2.7% of females entering kindergarten a year later, while no red-shirting occurred in the lottery in the low-income school district. Red-shirts were almost all younger students with birthdays before or close to school cut-off dates. Male red-shirts were predominantly 5.4 years of age or younger, while female red-shirts were 5.2 years of age or younger. Grouping red-shirt students and those retained in early grades shows that 8.6% of males and 4% of females in our sample red-shirted or stayed in grade. Red shirts were predominately younger students.

Our data also shows that 3.2% of males and 1.8% of females skipped grades. These students are almost entirely older. However, males and females are equally likely to be lottery winners or losers, and pose little threat for bias.

The second source of potential bias from attrition includes parents choosing private/home schooling or moving out of state. It seems unlikely that a kindergarten lottery outcome would be correlated with later decisions whether to move out of state. So the differential attrition in this category likely arises from attendance at private/home schools. Some parents who apply in our

lotteries may see a CK-Charter school as an alternative to private schools or home schools or as a back-up in case the student is not admitted to private school.

Buddin, 2012, analyzed national data from 2000-2008 and concluded that charter schools in suburban areas drew 68% of their students from public schools, 18% from nonsectarian private schools and 16% from religiously affiliated private schools. This suggests that the lottery applicants in our study could include a mix of parents with varying preferences for regular public schools or private sectarian or nonsectarian schools. In some cases, the CK lottery application could provide a back-up for not being admitted to a preferred public or private school. In other cases, the lottery applicant could prefer a CK-charter school as a first choice, but would enroll in one of the alternate schools if the lottery is lost.

Parents may have a higher propensity to enroll males than females in private/home schools if they lose the lottery. This higher propensity is much stronger in highly populated, suburban areas because of the expanded number of private schooling options,- some of which are tailored toward males.(Long, M.C., & Conger, D., 2013). These private schooling options may include “irregular” private schools that serve students with special needs as well as religious and nonsectarian schools.

Parents whose decisions involve private schools are also more likely to have higher incomes that can fund private school tuition. The average inflation-adjusted tuition in private elementary schools was \$12,000 in 2011 with a much higher rate in private nonsectarian schools—\$23,000, and the percentage of higher income families choosing a private school in a national sample was approximately 15-20% (Murnane and Reardon, 2018, Murnane, et al 2021). Choosing a private school at kindergarten entry could incur six years of tuition until middle school with approximate costs of \$72,000 to \$140,000. Winning the lottery may avoid substantial private school costs for some students in this lottery, and the sibling preference allows all children in the family to also attend without entering a lottery.

Not all CK-Charter schools are necessarily substitutes for private schools. CK-Charter schools with outstanding reputations in higher-income school districts might be expected to attract higher-income parents whose alternative would be a private school. This motivation might explain the very large number of applications combined with very low acceptance rates at lotteries 6, 8, 12.13 and 14 (see Table 4). Anecdotally, these lotteries are at CK-Charter schools with well-established reputations in high-income districts and can be seen as viable substitutes

for private schools. These higher-income parents may be more likely to send their children to CK-Charter schools if they win the lottery, but to private nonsectarian schools if they lose.

We use two types of sensitivity analyses to address these potential sources of bias and to provide transparency in the analyses of results. The first sensitivity analysis **eliminates 4 of the 14 lotteries** with the highest differential attrition; the second sensitivity analysis also eliminates all young students with early birthdays. The first sensitivity analysis eliminated four of the fourteen lotteries that had the highest level of differential attrition and associated risk for bias. These lotteries were in higher-income school districts with a CK-Charter school having a strong, long term reputation and having among the largest number of applications in our 14 lotteries. Our hypothesis suggests that parents in these districts have the resources to send their children to private schools, but some of these parents view their CK-Charter option as a free, close substitute for a nonsectarian school. The CK-Charter option could save from \$70,000 to over \$125,000 in tuition over 6 years of attendance. The second sensitivity analysis eliminates all young students in the age window for delayed entry and/or grade retention that includes male students younger than 5.4 years and female students younger than 5.2 years.

A final source of potential bias stems from lotteries with small samples of achievement data from either winners or losers. Small samples can result in highly non-representative achievement levels for lottery winners or losers, which causes bias. Small samples are more likely in two cases: for lottery winners since only about one in three applicants win the lottery and in schools with smaller kindergarten enrollment. Small samples are also more likely when estimating results by gender. We eliminate lotteries in each analysis when the number of lottery winners or losers falls below six achievement scores.

Estimating Single and Multiple Appliers with Achievement Data Across Three Grades

Some schools are located close enough together that parents could apply to more than one study school (multiple appliers). We provide estimates for “single appliers” and also for “all applications” that includes both single appliers and all multiple applications. Estimates using all-applications has significantly more statistical power to detect smaller effects by increasing the sample of students by about 25% and the number of lottery applications by about 56%. The single applier sample can be estimated using the standard methods (Bloom, 1984). A more complex estimation method is needed for the all-application sample that uses multi-way

clustering with pooling across grades and applications using a Huber-White adjustment for student-level variance (Wooldridge, 2002).

Non-Compliance

The non-compliance rate for lottery winners is 53.0%. This figure reflects the wide range of schooling choices in our middle/high income school districts. This result required estimating both ITT and TOT effects because TOT effects account for non-compliance. These effects are critical to interpreting policy impacts and in comparing results to other studies. The TOT effects have nearly identical levels of statistical significance as the ITT effects. TOT effects are in the range of 1.8 to 2.2 times larger than ITT effects in this study.

Estimation Methodology

The presence of multiple appliers requires a different estimation methodology than for single appliers. About 20% of students were in more than one lottery, and almost all applied to two lotteries. Our analysis for single appliers uses the standard RCT methodology for estimating ITT and TOT effects (Bloom, 1984; Raudenbush et al, 2012). The analysis including those applying to more than one lottery uses the multi-path clustering approach (Cullen et al, 2006) with each application (as opposed to each student) as the unit of observation and is referred to as the “all-application” sample.

We developed statistical models to identify how access to a CK charter school affected student achievement. For single appliers, the ITT model is estimated using Ordinary Least Squares (OLS) and reflects the impact of being offered a position in one of the CK-Charter schools. This so-called “intent to treat (ITT)” model is

$$A_{ig} = \beta W_{ij} + \gamma X_i + \sum_{ij} \delta_j D_{ij} + \varepsilon_{ijg} \quad (1)$$

where A_{ig} is an achievement score for student i in the g th grade, W is an indicator variable for the i th student winning the j th lottery, X is a set of student characteristics, D is an indicator for the student’s application to the j th lottery, and e is a stochastic error term.

Multiple applier students will have multiple records for each achievement score and for each charter school application (Cullen et al. 2006) in Eq. 1, so student-level residuals are likely to be correlated with one another at both the grade- and application-levels. For example, a student’s residual in 3rd grade math was unlikely to be independent of their 4th and 5th grade residual. Clustering methods were used to adjust for possible correlations of student residuals across

different grades and applications. The adjustment was based on a Huber-White sandwich estimator of student- or applicant-level variance (Wooldridge, 2002).

If winners were required to attend a charter or all winners choose the charter alternative, then β would reflect the relative achievement benefit (or decrement) from attending a charter school. Applicants are not required to attend the charter, however, and many “winning” parents choose another alternative as their circumstances change or they acquire more information on schooling options. As a result, β reflects the average benefit from receiving a charter offer, where the average is comprised of some students in a charter and some in an alternative school.

We extended the model to estimate how actual charter enrollment affected student achievement, i.e., the “treatment on treated (TOT)” estimates. TOT is a two-equation instrumental variable model where charter enrollment (E) is a function of W , X , and D :

$$E_{ij} = \theta W_{ij} + \vartheta X_i + \sum_{ij} \tau_j D_{ij} + \varphi_{ij} \quad (2)$$

The second equation estimates achievement (A) as a function of imputed enrollment from Eq. 2, as well as X , and D .

$$A_{ig} = \varphi E_{ij} + \pi X_i + \sum_{ij} \alpha_j D_{ij} + \omega_{ijg} \quad (3)$$

The TOT effect is φ , the effect of expected charter enrollment on achievement.

The ITT and TOT models were estimated separately by subject in grades 3 through 6 for English-LA and Mathematics as well as for a Colorado 5th grade science test. Several schools had lotteries in both cohorts, and these lotteries were treated separately for each cohort. The models also included demographic controls for grade, gender, race/ethnicity, and free/reduce lunch eligibility. Race/ethnicity and free/reduce lunch eligibility is only available for students who had at least one year of enrollment in Colorado schools. Achievement scores are standardized by grade and cohort.

Our TOT estimates use CK charter enrollment in kindergarten in the year of application as the enrollment variable. Additional models were estimated where enrollment was characterized as charter enrollment in any year or total years enrolled in a charter. These results were similar to those reported below.

RESULTS

We provide detailed results for the ‘All applications’ sample and both genders. The All-Application sample has the largest sample and highest power to detect effects. Both gender results are also included due to the higher potential for bias in the male sample. We also present a comparison of effects from single appliers with the “all applications” sample. Results showed slightly larger effects for the single applier sample.

Differential Attrition Characteristics of the Samples

Table 8 summarizes the sample sizes and the overall and differential attrition for the three estimated samples that include all applications. The three samples are the full sample (Full), the sample that eliminates the four lotteries with the highest differential attrition (Lotteries left out-L-LO), and the sample that, in addition, eliminates young students (L-LO & YS-LO). Table 8 shows that the high level of differential attrition for males in the full sample (-7.0***) is reduced in the L-LO sample (-3.4⁺) and eliminated in (L-LO&YS-LO) when young students are also left out (-0.0). The L-LO & YS-LO sample also eliminates differential attrition (-0.01) in the full sample. Thus while the Full sample and L-LO sample have significant bias risk, the L-LO&YS-LO sample has little risk for bias. Each estimate of effects below includes estimates for the Full sample, the L-LO sample and the L-LO&YS-LO sample to assess the extent and direction of potential bias.

These results suggest that the sources of differential attrition and the associated bias threat arise from two groups: (1) the four lotteries that have the largest differential attrition and, (2) all younger, primarily male students with early birthdays who parents often choose to delay entry or retain in grade. The former group are located predominately in high-income school districts that have CK-Charter schools with reputations that parents likely perceive as substitutes for private sectarian schools. In both situations, some parents who win the lottery may enroll in a CK-Charter school; but to hedge against losing, they may also apply to a private school or red-shirt or later retain a student if they lose the lottery. In the first case, parents will avoid the cost of private sectarian tuition. In the second case, parents who delay entry have another opportunity to win the lottery in the next year or can retain a child at a later grade. Eliminating differential attrition from the estimated sample reduces the bias threat, but the direction of the bias and the associated changes in estimated effects cannot be predicted in advance. Whether effects weaken

or strengthen is an empirical question that we address by comparing results across the three sample estimates.

Effect Estimates

The confirmatory hypothesis is that CK-Charter schools will have long-term, positive significant effects on English-LA achievement. We estimated intent-to-treat ITT results (Table 9) using achievement data from all grades as well as comparable estimates for grades 4, 5 and 6.

- The estimates using combined achievement from all grades show statistically significant effects that increase from the FULL sample (0.143**) to the L-LO sample (0.179**) to the L-LO&YS-LO sample (0.241***).
- The effects by grade show similar trends: statistically significant or marginally significant effects for each grade with similar trends that increase from the FULL sample to the L-LO sample to the L-LO&YS-LO sample. For instance, 6th grade effects increase from the FULL sample (0.114⁺) to the L-LO sample (0.128⁺) to the L-LO&YS-LO sample (0.208*).
- The estimates for the L-LO&YS-LO sample with no differential attrition show statistically significant, small size ITT effects at all grades (0.241***) and at 4th grade (0.196**), 5th grade (0.281**) and 6th grade (0.208*).

These results show a counterintuitive trend. As the sample declines from 6652 in the FULL sample to 4949 in L-LO sample to 4027 in the L-LO&YS-LO sample, the effect size increases and has stronger significance. These results suggest parental decision-making in middle/high income school districts may introduce a downward bias in kindergarten lotteries from parents who red-shirted or retain a student in grade and from higher income parents who can afford private schools but see a particular type of charter school as a close substitute. Since males are behind females in school readiness, much of the parental concern and bias is focused on males

Table 10 shows results by gender. Female effects show statistically significant effects for all three samples with small increases from the Full sample (0.223**) to the L-LO sample (0.242**) to the L-LO&YS-LO sample (0.267**). Since differential attrition was at low and nonsignificant levels in all three samples for females, the similarity in the effect size and significance might be expected.

However, the male results show a different pattern. We find insignificant positive effects for the Full sample (0.063) and the L-LO sample (0.068), and marginally significant effects for the L-LO&YS-LO sample (0.207⁺). The somewhat weaker size and significance of male effects may

reflect that the higher differential attrition for males (Table 8) only disappears for the L-LO&YS-LO sample. The reduced size of the male sample (1514) compared to females (2556) may also weaken male effects relative to female effects.

Table 11 compares estimated 3rd-6th grade effects for single applier students to the effects estimated for all applications that include students applying to more than one school. The single applier effects are statistically significant for all samples and show similar increasing effects as lotteries and young students are eliminated. The single applier effects show similar or modestly higher estimates for the FULL sample (0.155* vs. 0.143**), the L-LO sample (0.199* vs. 0.179**) and the L-LO&YS-LO sample (0.306** vs. 0.241**).

Table 12 compares both ITT and TOT estimates for all grades (3rd-6th), and for 4th, 5th and 6th grades for the L-LO&YS-LO sample. The TOT effects are all approximately twice as large as the ITT effects due to the 52% compliance rate. The TOT effects are statistically significant and moderate in size for the estimates, including all grades (0.473***), 4th grade (0.383**), 5th grade (0.543***) and 6th grade (0.404*). There are no upward or downward trends by grade suggesting the effects may have stabilized by fourth grade.

Table 13 provides the exploratory ITT and TOT effects for Mathematics and Science with effects also by gender for the L-LO&YS-LO sample. The science effects measured at 5th grade show statistically significant ITT effects (0.154*) for the all-gender sample, with marginally significant effects (0.184⁺) for females and positive, insignificant effects for males (0.083). The results for mathematics show insignificant, positive ITT effects for female (0.146) and male (0.003) results and for the all-gender (0.081) sample. The TOT effects for females in math (0.273) and science (0.339⁺) are much larger than the corresponding effects for males in math (0.006) and science (0.175), but the differences are not statistically significant.

Table 14 compares ITT effects for a single lottery for a CK-Charter school in a low income school district to the remaining 13 lotteries in middle to high income school districts. The ITT effects for the CK-Charter in a low income school district are statistically significant and large to very large in English-LA (0.944**) and Mathematics (0.735*), and positive, but insignificant for Science (0.468). The lotteries in middle/high income school districts show statistically significant effects in English-LA (0.201**), and positive, insignificant effects for Mathematics

(0.041) and Science (0.125). The effect differences between the two types of school districts are statistically significant for English-LA and Mathematics, but not Science.

Table 15 shows the more policy-relevant TOT effects comparing results from the low income school district to the middle/high income schools districts. The data show very large, statistically significant effects for the CK-Charter in a low income school district in English-LA (1.299**), and Mathematics (0.997*), and positive, but insignificant effects in Science (0.622). The corresponding TOT effects for the schools in middle/high income school districts (English-LA (0.445**), Mathematics (0.090) and Science (0.270)) show statistically significant differences compared to the low-income charter in English-LA and Mathematics, but not Science.

Overall, these effects are large enough to eliminate achievement gaps between advantaged and disadvantaged students in all three subjects. This long-term intervention that changed curriculum from K-6th grade shows no achievement gaps at 3rd-6th grade in English/Proficiency or Math or Science at 5th grade between low income students and middle/high income students.

Table 16 summarizes the 3rd – 6th grade TOT results by subject for the total sample and by gender with the estimated percentile gain across subjects and genders. These results show that the percentile gains estimated from the TOT effects for the all-applications sample were statistically significant for Reading/English-LA (16.1 percentile points), Science (10.2 percentile points) and positive, but insignificant for Mathematics (5.4 percentile points). Female results showed statistically significant TOT gains for Reading/English-LA (17.0 percentile points), marginally significant gains for Science (11.5 percentile points) and positive, but insignificant for Mathematics (9.3 percentile points). Male results showed marginally significant TOT gains for Reading/English-LA (15.0 percentile points), marginally significant gains for Science (6.0 percentile points) and positive, but insignificant for Mathematics (0.00 percentile points).

Discussion

Summary

There has been substantial **non-experimental** evidence linking gains in measures of General Knowledge to later achievement in Reading/English-LA, Science and Mathematics (Claessens et, 2009, Duncan et al, 2007; Duncan et al, 2020, Grissmer et al, 2010;). This evidence suggests that gains in General Knowledge would have a larger effect on future achievement than similar gains in the more widely studied non-cognitive skills including executive function, visuo-

spatial/fine motor and socio-emotional skills. However, the lack of experimental evidence for interventions directed at changing levels of General Knowledge has left improving non-cognitive skills as one of the best viable options for improving achievement even though it has proven challenging to design interventions using non-cognitive skills that raise later achievement.

The present study provides the **first experimental evidence** that suggests that a curriculum (Core Knowledge Curriculum) directed toward building General Knowledge from kindergarten to 8th grade leads to long term achievement gains. These results open a new category of interventions that build General Knowledge with potential effects predicted to be larger than interventions that target non-cognitive skills.

The current results (see Tables 15 & 16) show:

- statistically significant, moderate size, long-term TOT achievement gains (0.473***) from 3rd-6th grade in Reading/English-LA for the entire sample of students and schools spanning low to high income characteristics.
- statistically significant, small-size TOT achievement gains (0.300*) in 5th Grade Science for the entire sample of students and schools spanning low to high income characteristics.
- a small positive, but insignificant, TOT gain (0.159) in Mathematics for a sample of students and schools spanning low to high income characteristics.
- Large to very large, statistically significant, achievement gains in Reading/English-LA (1.299**) and Mathematics (0.997*) and moderate, positive, but insignificant Science effects (0.622) for a school in a low income school district that eliminated achievement score gaps in 3rd-6th grade in Reading/English-LA and Mathematics.

The evidence would suggest that the level of General Knowledge may be a critical, largely unmeasured, cognitive characteristic that may help explain the factors underlying achievement for students from all income levels as well as accounting for current achievement score gaps between advantaged and disadvantaged students. Moreover, this study suggests that the level of General Knowledge is malleable, and an intervention that increases General Knowledge may increase achievement for students from all family income groups with much larger effects that eliminate achievement gaps for disadvantaged students. The much larger effects for a school in a low income school district may simply reflect the greater opportunity that students from higher income homes have to acquire General Knowledge outside of school. However, it remains

surprising that the academic disadvantages associated with students from lower income families may be largely reflected in their lower level of General Knowledge, and that the level of General Knowledge is malleable, and that a school curriculum from K-6th could ameliorate the differences in General Knowledge and close achievement gaps.

The size of the long term TOT effects for Reading/English-LA (~ 16 percentile points) in this intervention is approximately equal to the difference in the achievement gains over the last 30-40 years between Reading/English-LA (7 percentile points) and Mathematics (25 percentile points) (Shakeel, M. D. & Petersen, P., E., 2021). The size of these 16 percentile gains could also close the international gap in Reading/English-LA for U.S. students. U.S. students placed 15th among 50 countries in the 2016 PIRLS 4th grade Reading/English test, but national student gains similar to gains in this intervention would place the U.S. among the top five countries (PIRLS, 2016).

This study may be the first experimental intervention that shows statistically significant ITT and TOT effects that improve long term achievement for students from all income groups. Conolly et al, (2018) has identified 1017 RCT's evaluating educational interventions in the 1980-2016 time frame, and the WWC has maintained a data-base of published results for experimental and quasi-experimental evaluations. Chabrier et al, 2016 has also summarized the results of high school, middle school and elementary school/kindergarten lottery based RCT's utilizing state achievement as outcomes. Few interventions in this universe are directed to raise achievement for students in all income groups and/or implement interventions that last for four or more years and/or measure long term effects, and none that have all of these characteristics.

Kraft, 2020 and Hill et al, 2008 characterizes how the size of educational intervention effects should be viewed that differs from the traditional view that labels small effects (~.25 SD), medium effects (~.50 SD and large effects (.75 SD). This new characterization recognizes that the size of actual intervention measurements are commonly insignificant, and those showing significant effects almost always lie in the range less than .25 SD for ITT effects. Unfortunately, this literature does not provide comparisons of TOT effects- which are often unreported. Using TOT effects provides better predictions of the effects for a student who actually experienced the intervention. The TOT effects in this intervention (.47 SD) would likely be in the range of the largest effects measured in previous interventions.

The absence of previous interventions with similar characteristics leaves open the question of whether the effects arise partly from the longevity of the intervention as opposed to the specific causative mechanisms arising from the Core Knowledge curriculum. The question becomes whether there are causative factors inherent in the intervention that might explain the effects.

Exploring Potential Causative Mechanisms

The Core Knowledge curriculum has many similarities and areas of agreement with more standard curriculum. For instance, the two curriculums do not differ on incorporating similar methods of building the early reading related skills associated with phonemic awareness and phonics. Both curriculum require teaching the subjects of Mathematics, Reading/English-LA, Geographical, History, Science and Mathematics. Core Knowledge incorporates a Mathematics Curriculum, but also allows schools to choose other Mathematics curriculum.

However, there are major differences in the Core Knowledge curriculum from the curriculum taught in typical public schools that might help account for the results. **The Core Knowledge curriculum is directed toward** building accumulative knowledge which requires a reconceptualization of the teaching of all subjects and the time devoted to each, and unlike almost all previous reading comprehension interventions, is not simply an instructional change during the Reading/English proficiency part of the reading curriculum.

Darling-Hammond et al, 2015, Darling-Hammond et al, 2020, Osher et al, 2020 and Cantor, 2019 provide comprehensive syntheses of the research involving learning and development that includes classroom practices that have evidence for improved short and long term student learning. The Core Knowledge curriculum has several characteristics identified by these syntheses that might help account for the achievement gains, and should be the focus of future mixed methods research in the classroom. These include:

- Curriculum that takes advantage of and enhances a student's existing knowledge about the world they live in (Barron et al, 2015; Willingham, 2003)
- Building knowledge through more emphasis on History, the Social Sciences and the Arts (Elleman & Osmond, 2019)
- An early and sustained focus on developing background knowledge (Ellerman & Osland, 2019; Willingham, 2003; Willingham, 2006)

- Learning the unique structure, the particular modes of inquiry and different types of text analysis that are unique to each subject taught (Ellerman & Osmond, 2019; Goldman et al, 2016; Shanahan & Shanahan, 2008).
- Combining explicit instruction organized around a conceptual map or schema (Kim et al. 2021; Kim et al, 2023, Core Knowledge, 2010)
- Learning and taking advantage of each student’s interest (Hidi et al, 2017)
- Greater efficiency from building on knowledge learned in previous grades and avoiding unnecessary content repetition (Engel et al., 2013).
- Reductions in cognitive load from a well-designed and integrated curriculum across all subjects and all K-8 grades (Paas & van Merriënboer, 2020; Engel et al., 2013; Willingham, 2006; Ellerman & Osmond, 2019).

The kind of integration and focus across all grades and subjects that characterizes the Core Knowledge curriculum is not typically prioritized in previous literacy interventions or in school districts or states where, typically, two subjects (Mathematics and Reading/English-LA) are given the highest priority and little integration occurs across subjects and grades.

These experimental results also directly address the three decades debate about the causative mechanisms underlying reading and verbal comprehension (Hirsh et al, 1988, Hirsch, 2003, Hirsch, 2006; Willingham, 2006, Hirsch, 2011; Willingham, 2017, Wexler, 2019). This debate involved whether the causative mechanism involved in increasing reading comprehension is due mainly to increasing the level of previous General Knowledge or to the acquisition of “procedural skills” that enable comprehension. This debate could not be settled due to the absence of definitive, long term experimental research testing both hypotheses. The results from this study would provide the first experimental evidence suggesting that building General Knowledge leads to higher Reading/English-LA achievement. While there is no long term experimental evidence on the effects of improving “procedural skills”, this approach has been the major focus to improving reading comprehension of Reading Panels and researchers for 30-40 years.

During this period, the major reading panels convened to recommend policies to improve reading comprehension focused primarily on improving the productivity of the time spent in Reading/English-LA instruction by teaching improved “procedural skills” to facilitate better comprehension. While acknowledging that the level of General Knowledge was an important

factor in comprehension, the series of panel recommendations over this extended period made no recommendations for the kind of dramatic policy changes that would be needed to enable significant improvements in General Knowledge; i.e, shifting the curriculum to much more time on Science and Social Science vs. time on Mathematics and Reading/English-LA instruction.

Rather, the panels and researchers primarily confined their search for interventions to the quality and type of instruction provided during the classroom time devoted to Reading/English-LA instruction. Improving this instruction was almost entirely directed toward improving the “interpretative skills” of students. While the role of General Knowledge was generally acknowledged to be an important factor in comprehension, there was no strategy or intervention identified in the various reading panel reports that was directed toward dramatic changes to improve a student’s General Knowledge. There has also been little change over 40 years on the time spent in different subjects in elementary grades (Morton, B., & Dalton, B., 2007; Hoyer, K., M., & Sparks, D., 2017; Perie et al, 1997). For instance, teacher reported weekly time spent at 3rd grade was 9.9 hours on Reading/English-LA, 5.8 hours on Mathematics, 2.9 hours on Science and 2.8 hours on Social Science.

This pattern of stable time usage over 30-40 years implies no dramatic changes in the time used to teach Reading/English-LA and rules out the type of curriculum changes required to implement an instructional strategy directed toward building reading comprehension through increasing General Knowledge. Rather, the large amount of classroom time devoted to Reading/English-LA is largely accounted for by teaching the early stages of reading comprehension (phonemic awareness, phonics, vocabulary). The achievement gains in Reading/English-LA of 7 percentile points over the 30-40 year period likely reflects the results of increasing the effectiveness on these early reading improvements, but there is little evidence that any dramatic changes occurred to increase reading comprehension.

The current results suggest that the “procedural skills” approach to teaching reading comprehension that has dominated reading comprehension instruction over the last 30 years in public schools is less effective than a “knowledge-based” approach that places cumulative General Knowledge as the main mechanism for increasing comprehension. Our conjecture is that the failure to significantly increase long-term English-LA achievement lies in the long term assumption that reading and verbal comprehension- the final phase of learning to read- is achieved by activities and subjects that attempt to teach students “procedural skills” rather than

activities and subjects that enable them to increase their General Knowledge. Multiple models of reading comprehension (Cromley & Azevedo, 2007; Talwar et al., 2018; O'Connor et al., 2017; Kim et al., 2017; Mol & Bus, 2011; Neuman et al., 2011; Reid et al., 2021; Shanahan et al., 2010) suggest that vocabulary and background knowledge (e.g., science and social studies topics) are essential to improved reading comprehension. If the current results prove replicable, the future theory underlying the “Science of Reading” will incorporate the acquisition of cumulative General Knowledge as a strong causative mechanism in later verbal and reading comprehension.

An intervention focused on increasing General Knowledge to improve reading comprehension appears to set off an unusual long term, compounding process whereby improved reading comprehension leads to increased knowledge, and increased knowledge leads to even better comprehension, leading to more increases in knowledge, etc. This compounding process would not only occur in Reading/English-LA linked to instruction, but across all subjects to the extent that they depend primarily on reading comprehension for learning. So achievement gains would likely spread across nearly all subjects. Moreover, these achievement gains in subjects would likely extend into future years as increased comprehension in one year leads to increased knowledge and comprehension in the next year, leading to even longer term gains. These cascading achievement effects across all subjects and over time would likely also increase years of educational attainment and future labor market success.

However, elevating General Knowledge to a more central place and higher priority in research and policy will require a significant conceptual shift from current impressions and understanding of the term “General Knowledge” as well as new research directions that aid in better understanding and articulating the role of General Knowledge in cognitive development. The term, “Building General Knowledge” does not readily trigger a conceptual map linking the intervention to higher achievement that occurs when other common interventions such as reducing class size, extending the school day, and raising teacher pay are considered.

Elucidating the possible causative links between increasing early General Knowledge and higher later achievement will be a necessary step in building this conceptual map. However, the first step is to provide a different conceptual understanding of the term “General Knowledge” and what it measures.

Understanding “General Knowledge”

The difficulty in conceptually linking General Knowledge to achievement may arise partly from the methodology of measuring General Knowledge that asks students a series of seemingly “simple” questions across a wide variety of topic domains. However, what makes a question simple and the answer remembered may be the presence of more in-depth knowledge and schema in a given domain (Willingham, 2003). That is, a student may be able to answer a “simple” question about baseball- how many outs in an inning- because he has experience and/or more in-depth knowledge from playing or watching or tracking baseball games. If a student has little knowledge of baseball, it is unlikely to either come across and/or remember any reference to baseball having three outs in each inning.

Measures of General Knowledge would then measure the number of domains in which a student has developed some in-depth/critical knowledge and understanding. Thus, measures of General Knowledge might then reflect both the breadth and depth of knowledge across all domains of a student’s knowledge. Thus the term “Total Knowledge” may more accurately convey the meaning of “General Knowledge” and also provide a possible explanation of why it may be the single most important predictor of later achievement across all subjects and may also be the single best predictor of years of educational attainment, future wages and productivity.

Currently the measures that are used to characterize the overall status of educational progress and used to predict long term outcomes include early Mathematics and Reading/English-LA achievement. This emphasis leads to the identification and research on non-cognitive characteristics like executive function, socio-emotional and visuo-spatial skills as targets of interventions to improve achievement. However, this approach leaves out what may be the single most important variable linked to future achievement in all subjects and possibly later life outcomes - the students level of General Knowledge.

The level of a students General Knowledge is highly correlated with the more traditional measures of SES, parental education and income often used to predict future achievement and account for achievement score gaps. This correlation is likely linked to the greater opportunities in higher income and SES families to accumulate General Knowledge (Lareau, 2011). This level of General Knowledge may underlie the power of SES measures to predict a range of future outcomes. However, unlike such SES measures, General Knowledge is malleable and

interventions that raise students General Knowledge may be the single most effective way to increase later achievement, close achievement gaps and raise other long term outcomes.

A recent study adds a new dimension to the role of General Knowledge in raising later achievement. Jirout et al, 2022 suggest that students early attitudes toward school and learning (curiosity, enjoyment of schooling) in pre-k and 1st grade is bi-directionally linked to their level of General Knowledge. Thus expanding early General Knowledge that links to students curiosity about the world they experience may play a pivotal role in shaping students attitudes, motivation and satisfaction with early schooling and possibly extend into later schooling.

It is hard to identify a more central and important cognitive learning capacity than continually being able to comprehend more and more of what is read. Such continually increasing comprehension appears to be built upon an increasing accumulation of General Knowledge. Success in this process not only affects all future learning, but also builds self-confidence, motivation and social connections. This capacity appears to lie at the heart of individual cognitive and social development.

Future Research Implications

Future research on the Core Knowledge curriculum needs a broad focus that:

- Identifies opportunities for replication by identifying oversubscribed charter schools teaching the Core Knowledge curriculum
- Uses historical empirical research to estimate whether there are significant differences in achievement in Core Knowledge schools vs. schools with similar characteristics that do not teach Core Knowledge.
- Designs newly implemented state or district level RCTs that randomly assign the Core Knowledge curriculum to schools using mixed methods data collections to discover causative mechanisms including classroom observations and surveys of parents, teachers and students.,
- Develops and refines specific causative hypotheses that might account for the results of this study and establish links to established theories and empirical research.
 - Identifies through case studies and classroom observations the differences in time spent on subjects and in student and teacher interactive behavior by subject and grade between schools teaching Core Knowledge and similar schools not teaching Core Knowledge
 - Integrates these results into the broader literature that includes Darling-Hammond et al, 2015, Darling-Hammond et al, 2020, Osher et al, 2020,

Cantor, 2019, Hanushek et al, 2019, Pellegrino, 2012 and Pellegrino, & Hilton, 2013; Schneider and McGrew, 2012).

- Addresses whether the Core Knowledge curriculum raises achievement for students from all family income levels with much larger effects for low income students.

These experimental results together with the extensive non-experimental evidence about General Knowledge seems sufficient to initiate a large scale research effort aimed at replication of results and better understanding of the causative mechanisms underlying the effects. The results from a single intervention and evaluation can never provide sufficient evidence for achieving a new longer term research or policy consensus among researchers or policymakers or for understanding of the causative mechanisms. However, unexpected experimental results often suggest that current theories underlying learning and educational interventions need to be examined to assess how to accommodate the new experimental results. In the long term, it is stronger theories and increased understanding of the causative mechanisms that predict the results of new experimental evidence that moves science forward.

Issues in Implementation

State and local policymakers will be the primary decision-makers involving implementation of Core Knowledge in Charter schools and/or in public schools. When making such decisions, a number of factors are involved besides the size of the expected impact and its uncertainty. RCTs that produce significant effects that can be replicated often pose a significant challenge to maintaining effects when implemented in the real world. Implementing new interventions from small scale RCTs often carries risk from decaying effects in the longer term, limited generalizability, lack of fidelity in transferring the intervention from the lab to widespread implementation in schools and uncertain costs.

One risk in implementing interventions that have shown significant effects in RCTs is that measurements of effects have only been made over short terms, and long term effects may decay (Guerrero-Rosada, et al, 2021; Kruger, 2011; Dick et al, 2019; Romero et al, 2021; Bailey et al, 2017; Bailey et al, 2020). However, this study measured the long- term effects of the Core Knowledge intervention implemented from K-6 through 3rd-6th grade, and results remained significant through 6th grade.

Another implementation risk is that later replications would significantly reduce the size and significance of effects, as has occurred in other interventions (Ioannidis et al, 2017; Kirkham, et al, 2010; Dwan et al, 2013, Shah et al, 2020). While this risk is a possibility, not all RCTs have

equal replication risk. Failure to replicate results is probably more likely when results are short term, sample sizes and/or effects are small, the statistical significance is in the marginal $p < .05$ range, and the intervention is research-based and not yet widely implemented making fidelity problematical. In this study, the replication risk is likely reduced by four factors: (1) the size of current TOT effects in the moderate size range, (2) their strong statistical significance ($p < .005$) due partly to a very large sample size together with their measurement in the long term over four grades, and (3) the widespread, long term implementation of the intervention in over 700 schools nation-wide and, (4) an associated professional development infrastructure exists to aid in implementation.

Finally, implementing new interventions from small scale RCTs often carries risk from limited generalizability and uncertain costs. This intervention included students from all income levels with different sizes of significant effects for low vs. middle/high income students that limits the risk from generalizability. Finally, the long-term cost of the intervention is low since the marginal costs involve mainly the professional development expenditures involving the Core Knowledge curriculum.

Policymakers should consider future implementations that combine the Core Knowledge curriculum intervention with other types of non-curriculum interventions that have experimental evidence for increasing achievement. Interventions that have measured both Mathematics and Reading outcomes have almost always shown larger effects in Mathematics than in Reading/English-LA (see, for instance, Chabrier et al, 2016). Thus, combining Core Knowledge with the non-curriculum intervention, “No Excuses”, in KIPP schools would combine two interventions with experimental evidence that may better address eliminating achievement gaps in both Mathematics and Reading/English-LA.

Implications for Educational and Social Policy

Federal data collections are designed to monitor and better understand the most important economic, educational, and social trends in society. This paper has suggested that the primary measures currently collected to monitor education including measures of Mathematics and Reading/English-LA (as well as other subjects) do not capture an important aspect of learning—namely the level of General Knowledge. Well-designed measures of General Knowledge should be considered as an important addition to our routinely collected national measures for students in elementary grades. However, designing nationally collected measures of General Knowledge

will pose a substantial challenge for researchers and policymakers, not unlike the challenge of measuring the Gross National Product as an economic indicator.

However, measures of General Knowledge will carry an additional challenge. Characterizing and measuring the General Knowledge that young students have in lower elementary grades will need not only scientific validity, but also political viability. There may be differences among groups of adults that vary by SES and/or cultural characteristics about what General Knowledge may be important for children to have to enable higher later achievement and other educational objectives. Attempting to define such General Knowledge will undoubtedly trigger debates and a variety of viewpoints. But characterizing the General Knowledge that is needed to better understand the books actually read by children and the textbooks used in future education seems essential to educational efficiency and meeting long term goals. What seems essential, and less controversial, is to focus on linking the gains in early General Knowledge (however defined) to later achievement-

Finding a lack of progress over the last 40 years in raising long-term Reading/English-LA achievement is not an unusual pattern in fields of scientific research. Fallow periods are the rule rather than the exception, as are periods of very rapid progress, often triggered by unexpected experimental results, new experimental technologies, or new theories. The lack of more rapid progress in Reading/English-LA achievement cannot be assigned to poor quality research or failing to adhere to a scientific approach in research or the lack of research funding. Rather the primary problem in educational research is that the field of inquiry is one of the most difficult and challenging for the scientific method to address. Slow scientific progress is to be expected with the presence of a multitude of forces that can influence outcomes in a non-linear and interactive manner, together with the great difficulty in producing definitive experimentation with younger subjects.

Accumulating General Knowledge leading to better understanding of a student's experience in the world is certainly an unmeasured by-product of current curriculum and educational and social policies. However, the current results suggest that explicitly making building General Knowledge one of the primary objectives of early development and elementary education may lead to higher long-term achievement across all subjects. Currently, the primary measures used to characterize the performance of K-12 students are achievement scores in Mathematics and Reading/English-LA. These subjects and associated trend measures are used in policy to broadly

characterize the quality and performance of students and of the education system leading to their prioritization in the curriculum.

The results of this study would suggest that this prioritization of the subjects of Mathematics and Reading/English-LA fails to adequately capture a critical measure of a student's cognitive development- namely their General Knowledge of the world. The level of General Knowledge may be the single best indicator of a wide range of future outcomes. The absence of this measure in educational and social science research and policy may have high opportunity costs from lower achievement for all students and larger achievement gaps between advantaged and disadvantaged students. Assuming future replication will support the current evidence, priority should be given to **making measures of General Knowledge a central objective of educational and social policy and future data collection.**

A significant interpretive weakness in previous research may be embedded in the theory and language involving the economic theory of human capital that places the emphasis on “skill building” as the primary developmental cognitive process involved in learning as described in Bailey et al, 2017. This theory characterizes development as the process of building increasingly complex skills summarized in the phrase “skill begets skill” (Heckman, 2006).

However, the results of this study would suggest that there are two separate, but complementary, cognitive processes involved in development and learning: skill building and General Knowledge accumulation. So, in addition to characterizing learning and development as a process of “skill begets skill”, “knowledge begets knowledge” must be added as a critical process. And it would not be surprising to eventually find that “skill x knowledge begets skill x knowledge. Building skills and building knowledge both seem essential to learning, and are likely interactive and our research and policy frameworks should change to incorporate both cognitive processes.

Caveats

This RCT had no pre-test data. Ideally pre-test data can provide evidence for significant deviations from perfect randomization and also information to assess bias risk especially for smaller sample RCTs. However, the value of pre-tests depends on the quality and reliability of the measures and the attrition rate in the pre-tests. For kindergarten-based lotteries that have much later school achievement tests as outcome measures, any earlier pre-test would have to be administered outside schooling during a narrow window between the lottery application and the

actual lottery after obtaining parent permission. Such measures would have less reliability and lower response rates than the state administered measures of achievement partly due to the younger age of students, more limited testing time and out-of-school administration. Pre-tests under these circumstances would appear to add little to the quality of the effect estimates. These limitations will always be present in experimental studies using kindergarten lotteries with later state collected achievement data as outcome measures.

The results in this study will generalize only to the types of CK-Charter schools that were selected for inclusion in the study. These CK-Charter schools had been in operation for over four years, spanned all income groups and were oversubscribed. Being oversubscribed is a limitation in all kindergarten lottery-based experimental studies. The characteristics of oversubscribed schools may differ from schools that were not over-subscribed. For instance, the over-subscribed schools may have characteristics better known by local parents that reflect their higher achievement in ways not linked to Core Knowledge. If the oversubscribed schools were similar to one another, the threat for bias and limited generalization could be significant. However, the oversubscribed lotteries in our sample have a wide diversity in characteristics including amount of oversubscription, size of school, location of school, sample size of winners and losers, percentage of lottery winners, size of queue and characteristics of the school districts and parents. Future experimental studies that rely on different methods for establishing randomization that do not exclude oversubscribed schools will be needed to assess whether effects differ between such schools.

The effects measured in the low income school district depend on a single lottery and a relatively small lottery sample size of 62. Although the results are highly significant, these results carry much more replication risk than do the main results from all lotteries. Also, the cause of the effect may be different than for the schools in middle/high income districts. For example, the public school alternatives in the low-income district may have weaker relative performance than the alternatives in middle/high income districts. For these reasons, it will be essential to replicate these effects in low income school districts.

Another important question is the extent to which these effects can be attributed to the Core Knowledge curriculum as opposed to being implemented in a charter school. However, the evidence reviewed in the study suggests that being a charter schools alone does not predict higher achievement outside of inner city charter schools, leaving Core Knowledge as a likely

cause of the effects in suburban schools. But much more replication is needed utilizing the charter school methodology in this study.

Currently, the Core Knowledge curriculum is implemented widely in both charter and regular public schools suggesting the possible absence of substantial implementation issues that would differentially impact the effectiveness of Core Knowledge in regular and charter schools. However, the study provides no experimental evidence that the Core Knowledge curriculum in regular public schools would produce similar effects. There may be differences between charter and public schools that might lead to differences in impacts of the Core Knowledge curriculum. For instance, teachers may play a critical role in successfully implementing and taking advantage of the Core Knowledge curriculum – and any differences between charter and regular public schools in attracting, retaining and enabling high quality teachers could account for part of the measured effects.

An important consideration for policymakers deciding whether to implement the Core Knowledge curriculum is that the evidence shows achievement effects on 3rd-6th grade students only for students who have experienced Core Knowledge from kindergarten through 3rd-6th grade. Implementation in early grades may be critically important since early knowledge building appears to be a critical element. However, implementation at later grades or for shorter periods in early grades would be problematical. Finally, measurable effects may require experiencing Core Knowledge for several years, i.e., measuring no effects after one or two years may not test whether longer term effects exist.

Researcher bias is a potential threat whenever cited results are based on samples that eliminate a significant fraction of total observations. This study certainly carries that threat since some of the cited results are based on samples that have eliminated over one-third of the observations. Moreover the sources of the missing observations (attrition) cannot be accounted for by the often cited random non-response, but rather primarily occur due to parents making alternative schooling decisions for their children at kindergarten entry or between kindergarten entry and third grade. These decisions to delay entry, retain in-grade or attend private or non-sectarian schools prevented students from taking state administered achievement tests between 3rd-6th grade that were comparable across the entire sample. And these decisions caused both non-random attrition as well as attrition differences between lottery winners and losers, making using the full sample for estimation potentially biased.

However, the threat of researcher bias is not present for effect estimates for females, but only for estimates that include males. The absence of researcher bias for female estimates is due to the lower, insignificant level of female attrition and the absence of differential attrition in the female sample (see Table 6). This absence of the potential for researcher bias in female results is indicated by the similarity of effect estimates across the three estimated samples for females (see Table 8). On the other hand, the male estimates using the three samples have results that range from null effects in the first two samples to a statistically significant effect in the third sample (see Table 8).

There are two different interpretations of these different gender results. The first interpretation from the set of results with the full sample is that the intervention worked for females, but not for males. However, the interpretation from the results from the third sample would be that the results for the full sample of males is biased downward, but removing the bias through elimination of observations that cause high levels of differential attrition makes effects for both genders significant and similar in magnitude.

The theory underlying at least part of these gender differences in bias potential (articulated in the report) is that females have higher levels of parent perceived levels of school readiness than similarly aged males. This gender difference in school readiness leads to parent preferences to delay entry for some younger males. However, the decision to delay entry can be made more complicated for those winning the lottery- an opportunity that may not be present in the next year. Thus the data would suggest that some parents who win the lottery decide to start a child in a preferred school, but if that lottery is lost, parents decide to delay entry to the following year. A second mechanism that helps explain these gender differences is that parents of the marginally readiness males more often apply to private and non-sectarian schools as an additional alternative. However, these parents would have to be in higher income groups that could afford private/nonsectarian tuition.

Finally, this intervention was registered in the Open Science registration in 2017-18 as part of receiving funding from the Arnold Foundation. The evaluation methodology registered at that time did not take account of the possibility of having bias in the results, and utilized the standard RCT methodology for estimation. The bias was unexpected since it stems only in RCT's using kindergarten lotteries having middle/high income student samples. This was the first RCT to encounter this form of bias. The Open Science framework for reporting results works well for

RCTs that do not encounter new, unexpected forms of bias. Future RCTs using kindergarten lotteries that include middle/high income students can incorporate the methodologies used here to predict future effects using the Open Science framework.

The unexpected sources of bias in this study changed the method for reporting results. The Open Science Framework calls for reporting the primary results utilizing the methods specified in the Framework first, and then to present results using other specifications or samples as exploratory analysis. However, when unexpected bias is encountered, the presentation of results should change to reflect the presence of bias.

The results that are presented first as the best estimates arising from the study should be the unbiased results. In this study, the female results with the full sample show no differential attrition and are likely unbiased. The full male sample has significant differential attrition and likely significant associated bias making the sample using both genders also biased. However, identifying and eliminating the sources of bias by eliminating younger students and lotteries with the highest differential attrition leaves a sample with no differential attrition. Estimates from this “unbiased” sample are presented first in our analysis as the primary results. We also present estimates for the full sample of males and for the full sample including both genders as “biased” estimates.

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Appendix A Figures

Figure 1 Achievement Gains in Math and Reading Using Two Data Sources

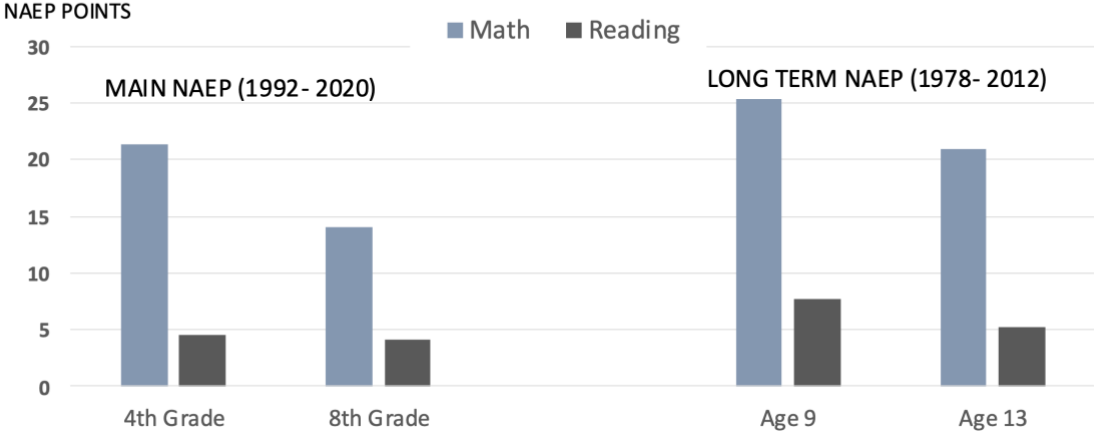
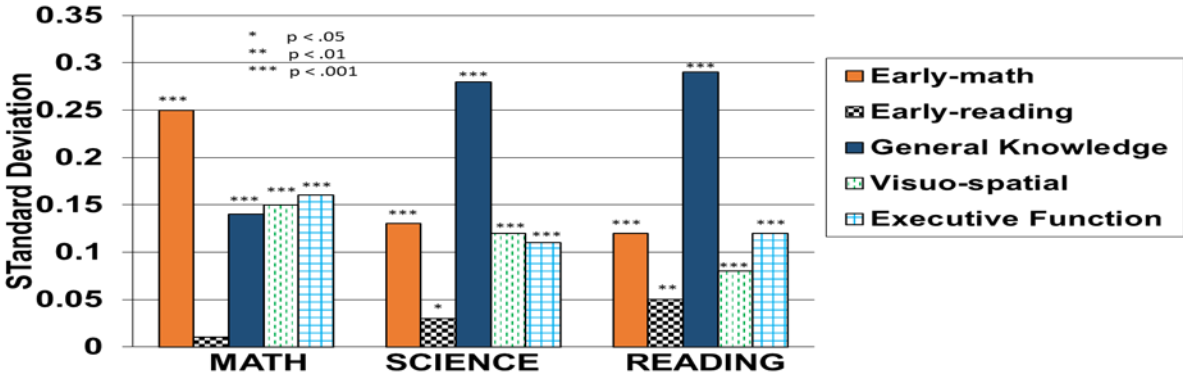


Figure 2 Estimated Effects of Early Skills at Kindergarten Entrance on 8th Grade Achievement



Appendix B Tables

Table 1 Characteristics of School Districts for Nine Participating Schools

Nearest City/Town	Number of lotteries	School District	Median Family Income ¹	% families with children under poverty level ¹	School Size (K-8) ²
Aurora	1	Adams-Arapahoe	51,424	28.8	544
Loveland	2	Thompson	75,105	10.5	481
Ft Collins	1	Poudre	77,491	11	798
Ft Collins	1	Poudre	77,491	11	571
Arvada	1	Jefferson	85,793	9.7	466
Littleton	2	Littleton	92,137	6.7	772
Castle Rock	2	Douglas	114,223	3.6	767
Highlands Ranch	2	Douglas	114,223	3.6	600
Castle Pines	2	Douglas	114,223	3.6	2359

¹ Estimated using the School District Data from the American Community Survey (2014) five year estimates (2010-2014). Median Income in 2010 inflation adjusted \$

² Estimated enrollments for 2016-2017 School Year

Table 2 Sample Sizes for Lottery Applications and Students

	Single Appliers	More Than One Lottery	Total	% Single
Applications	1831	1022	2853	64.2%
Students	1831	479	2310	79.3

Table 3 Lottery Outcomes

	Winners	Losers	% Winners	Winners	Losers	% Winners
	Single Appliers			All-Applications		
Applications	688	1143	37.6%	1011	1842	35.4%
Students	688	1143	37.6%	954 ¹	1356	41.3%

¹ Student Won at Least One Lottery

Table 4 Lottery Applications and Outcomes for the All-Applications Sample by Lottery

	Winning Applications	Losing Applications	Total Applications	% Winning Applications	Winner's Accepting	% Accepting
Lottery 1	57	43	100	57.0%	35	61.4%
Lottery 2	47	116	163	28.8%	33	70.2%
Lottery 3	202	105	307	65.8%	60	29.7%
Lottery 4	233	164	397	58.7%	71	30.5%
Lottery 5	26	36	62	41.9%	16	61.5%
Lottery 6	73	240	313	23.3%	33	45.2%
Lottery 7	34	42	76	44.7%	20	58.8%
Lottery 8	44	160	204	21.6%	24	54.6%
Lottery 9	73	150	223	32.7%	30	41.1%
Lottery 10	36	73	109	33.0%	21	58.3%
Lottery 11	73	22	95	76.8%	24	32.9%
Lottery 12	39	228	267	14.6%	20	51.3%
Lottery 13	46	296	342	13.5%	23	50.0%
Lottery 14	28	167	195	14.4%	16	57.1%
Total	1011	1842	2853	35.4%	475	47.0%

Table 5 Randomization Tests for Gender and Age

	% Female Winners	% Female Losers	Z-Value	Average Age-Losers	Average Age- Winners	Z-Value
Lottery 1	55.81	54.39	-0.14	5.64	5.57	-0.198
Lottery 2	59.13	73.91	1.86	5.57	5.55	-0.063
Lottery 3	60.00	48.47	-1.93	5.61	5.64	0.086
Lottery 4	52.20	53.91	0.33	5.55	5.60	0.162
Lottery 5	51.43	42.31	-0.71	5.71	5.66	-0.151
Lottery 6	52.47	47.95	-0.67	5.55	5.58	0.078
Lottery 7	43.59	41.18	-0.21	na	na	na
Lottery 8	54.84	44.19	-1.24	5.58	5.56	-0.070
Lottery 9	53.38	49.32	-0.57	5.56	5.52	-0.094
Lottery 10	50.00	54.29	0.42	na	na	na
Lottery 11	30.00	40.28	0.87	5.54	5.60	0.189
Lottery 12	53.18	52.63	-0.06	5.66	5.52	-0.503
Lottery 13	50.69	53.33	0.33	5.59	5.55	-0.121
Lottery 14	42.59	29.63	-1.35	5.58	5.37	-0.606
Total	52.02	50.15	-0.943	5.58	5.59	0.012

Table 6 Attrition Statistics for 3rd -6th Grade English-LA Achievement for All-Applications

	Total Sample	Lottery Winners	Lottery Losers	Differential Attrition
FEMALES				
Potential Achievement Scores (3 rd -6 th Grade)	5172	1798	3374	
Missing Achievement	1621	559	1062	
Overall Attrition	31.3%	31.1%	31.5%	-0.4
MALES				
Potential Achievement Scores (3 rd -6 th Grade)	4915	1779	3136	
Missing Achievement	1791	567	1224	
Overall Attrition	36.4%	31.9%	39.0%	-7.2***
TOTAL SAMPLE (including missing gender)				
Potential Achievement Scores (3 rd -6 th Grade)	10349	3632	6717	
Missing Achievement	3674	1181	2493	
Overall Attrition	35.5%	32.5%	37.1%	-4.6***

+ p < .10, * p < .05, ** p < .01

Table 7 Sources of Attrition by Lottery Status and Gender

	Off-track		Not Tested		Private/Home/Out of State		Total	
	No-offer	Offer	No-offer	Offer	No-offer	Offer	No-offer	Offer
Males								
% of Attrition	11.9%	9.6%	4.9%	5.1%	20.6%	15.5%	37.4%	30.2%
Std. Error	0.68%	0.82%	0.45%	0.62%	0.85%	1.01%		
Differential Attrition		-2.3*		0.2		-5.1**		-7.2**
Females								
% of Attrition	4.7%	6.5%	6.6%	6.3%	18.6%	16.9%	29.9%	29.8%
Std. Error	0.68%	0.82%	0.45%	0.62%	0.85%	1.01%		
Differential Attrition		+1.8		-0.3		-1.7		-0.1

+ p < .10, * p < .05, ** p < .01, *** p < .005

Table 8 Overall and Differential Attrition for Samples with Different Bias Vulnerability

	All Ages		Young Ages Excluded ¹	
	All Lotteries (FULL)	Lotteries Excluded ² (LLO)	All Lotteries (YSLO)	Lotteries Excluded ² (LLO_YSLO)
ALL APPLICATIONS³				
Overall Attrition	34.1%	33.8%	32.8%	31.6%
Differential Attrition	-4.5***	-1.6	-4.8***	-0.01
WWC Criteria	Liberal	Conservative	Liberal	Conservative
Sample	7496	6336	6620	5568
FEMALES				
Overall Attrition	29.9%	29.7%	28.9%	28.6%
Differential Attrition	-0.0	0.02	-0.02	-0.0
WWC Criteria	Conservative	Conservative	Conservative	Conservative
Sample	3744	3408	3541	3223
MALES				
Overall Attrition	35.0%	34.6%	32.7%	31.8%
Differential Attrition	-7.0***	-3.4 ⁺	-5.0**	-0.0
WWC Criteria	Liberal	Liberal	Liberal	Conservative
Sample	3562	2980	2889	2324

⁺ p < .10, * p < .05, ** p < .01, *** p < .005

1 Sample excludes males younger than 5.4 years and females younger than 5.2 years as of October 1

2 Sample excludes lotteries with average 3rd-6th achievement samples less than 7 and/or high and significant differential attrition

3 All Applications includes applications with no gender- about 2.5% of the total sample- and none of these applications have achievement data

Table 9 Comparing English Proficiency ITT Effects¹ for Specific Grades and Different Bias Vulnerability

	All Grades	4 th Grade	5 th Grade	6 th Grade
Full Sample				
Effect Size	0.143**	0.109 ⁺	0.169**	0.114 ⁺
Sd. Error	(0.053)	(0.059)	(0.062)	(0.064)
Sample	6652	1888	1810	1728
Eliminate Highest Differential Attrition Lotteries²				
Effect Size	0.179**	0.167 ⁺	0.220**	0.128 ⁺
Sd. Error	(0.063)	(0.072)	(0.074)	(0.074)
Sample	4949	1375	1307	1244
Eliminate Young Students³ and Highest Differential Lotteries				
Effect Size	0.241***	0.196**	0.281**	0.208*
Sd. Error	(0.068)	(0.075)	(0.080)	(0.085)
Sample	4027	1162	1098	1037

⁺ p < .10, * p < .05, ** p < .01, *** p < .005

1 Estimated using multiway clustering (Cameron et al, 2011)

2 Sample excludes lotteries in middle/high income school districts with highest differential attrition and lotteries that have very small achievement samples (six or fewer observations)

3 Sample excludes males younger than 5.4 years and females younger than 5.2 years as of

Table 10 Comparing 3rd-6th Grade English Proficiency ITT Effects by Gender for Samples with Different Bias Vulnerability

		Full Sample	Eliminate Highest Differential Attrition Lotteries ¹	Eliminate Young Students ² and Highest Differential Attrition Lotteries
Females	Effect Size	0.223**	0.242**	0.267**
	Sd. Error	(0.077)	(0.081)	(0.085)
	Sample	3541	2960	2556
Males	Effect Size	0.063	0.068	0.207 ⁺
	Sd. Error	(0.074)	(0.094)	(0.112)
	Sample	3111	2200	1514

⁺ p < .10, * p < .05, ** p < .01, *** p < .005

- 1 Eliminates lotteries in high/middle income school districts that have the largest differential attrition levels
- 2 Eliminates young applicants- males less than 5.4 years and females less than 5.2 years

Table 11 Comparing 3rd-6th English Proficiency ITT Effects for Single Appliers and All Applications

	Full Sample	Eliminate Highest Differential Attrition Lotteries ¹	Eliminate Young Students and Highest Differential Attrition Lotteries ²
Single Appliers			
Effect Size³	0.155 *	0.199 *	0.306 **
Sd. Error	(0.071)	(0.081)	(0.086)
Sample	4114	3067	2647
All Applications			
Effect Size⁴	0.143 **	0.179 **	0.241 **
Sd. Error	(0.053)	(0.063)	(0.068)
Sample	6652	4949	4027

⁺ p < .10, * p < .05, ** p < .01, *** p < .005

- 1 Sample excludes lotteries in middle/high income school districts with highest differential attrition and lotteries that have very small achievement samples (six or fewer observations)
- 2 Sample excludes males younger than 5.4 years and females younger than 5.2 years as of October 1
- 3 Estimated using one-way clustering across grades
- 4 Estimated using multiway clustering across grades and multiple applications (Cameron et al, 2011)

Table 12 Comparing ITT and TOT English Proficiency Effects by Grade for Sample Eliminating Lotteries with High Differential Attrition¹ and Young Students²

	All Grades	4 th Grade	5 th Grade	6 th Grade
ITT Effects				
Effect Size	0.241***	0.196**	0.281**	0.208*
Sd. Error	(0.068)	(0.075)	(0.080)	(0.085)
Sample	4027	1162	1098	1037
TOT Effects				
Effect Size	0.473***	0.383**	0.543***	0.404*
Sd. Error	(0.135)	(0.146)	(0.156)	(0.162)
Sample	4027	1162	1098	1037

+ p < .10, * p < .05, ** p < .01, *** p < .005

- 1 Sample excludes lotteries in middle/high income school districts with highest differential attrition and lotteries that have very small achievement samples (six or fewer observations)
- 2 Sample excludes males younger than 5.4 years and females younger than 5.2 years as of October 1

Table 13 Mathematics and Science ITT and TOT Effects by Gender for Sample Eliminating Lotteries with High Differential Attrition¹ and Young Students²

		Both Genders	Females	Males
ITT Results				
Mathematics(3 rd -6 th Grade)	Effect Size	0.081	0.146	0.003
	Sd. Error	(0.071)	(0.089)	(0.118)
	Sample	4023	2557	1508
Science (5 th Grade)	Effect Size	0.154*	0.184 ⁺	0.083
	Sd. Error	(0.075)	(0.097)	(0.115)
	Sample	1113	690	467
TOT Results				
Mathematics(3 rd -6 th Grade)	Effect Size	0.159	0.273	0.006
	Sd. Error	(0.139)	(0.168)	(0.250)
	Sample	4023	2557	1508
Science (5 th Grade)	Effect Size	0.300*	0.339 ⁺	0.175
	Sd. Error	(0.147)	(0.178)	(0.239)
	Sample	1113	690	467

+ p < .10, * p < .05

- 1 Eliminates lotteries in high/middle income school districts that have the largest differential attrition levels
- 2 Eliminates young applicants- males less than 5.4 years and females less than 5.2 years

Table 14 Comparing ITT Effects by Subject for a CK-Charter School in a Low Income School District to CK-Charter Schools in Middle/High Income School Districts

		English Proficiency (3 rd -6 th grade)	Mathematics (3 rd -6 th grade)	Science 5 th Grade
Low Income School District	Effect Size	0.944**	0.735*	0.468
	Sd. Error	(0.295)	(0.350)	(0.316)
	Sample	167	166	41
Middle/High Income School Districts	Effect Size	0.201**	0.041	0.125
	Sd. Error	(0.070)	(0.073)	(0.077)
	Sample	3860	3857	1072
Effect Difference		0.743**	0.694*	0.343

+ p < .10, * p < .05, ** p < .01, *** p < .005

Table 15 Comparing TOT Effects by Subject for a CK-Charter School in a Low Income School District to CK-Charter Schools in Middle/High Income School Districts

		English Proficiency (3 rd -6 th grade)	Mathematics (3 rd -6 th grade)	Science 5 th Grade
Low Income School District	Effect Size	1.299**	0.997*	0.622
	Sd. Error	(0.459)	(0.439)	(0.380)
	Sample	167	166	41
Middle/High Income School Districts	Effect Size	0.445**	0.090	0.270
	Sd. Error	(0.155)	(0.160)	(0.166)
	Sample	3860	3857	1072
Effect Difference		0.854**	0.907*	0.352

+ p < .10, * p < .05, ** p < .01, *** p < .005

Table 16 Summary of 3rd-6th Grade TOT Effects and Percentile Gains for Sample with Excluded Young Students and High Differential Attrition Lotteries

		English	Math	Science
ALL APPLICATIONS	Effect	0.473^{***}	0.159	0.300[*]
	Std Error	(0.135)	(0.139)	(0.147)
	Sample	4027	4023	1113
	Percentile Gain	16.1^{***}	5.41	10.2[*]
FEMALE	Effect	0.500^{***}	0.273	0.339⁺
	Std Error	(0.162)	(0.168)	(0.178)
	Sample	2556	2557	690
	Percentile Gain	17.0^{***}	9.3	11.5⁺
MALE	Effect	0.440⁺	0.006	0.175
	Std Error	(0.238)	(0.250)	(0.239)
	Sample	1514	1508	467
	Percentile Gain	15.0⁺	0.002	6.0⁺

⁺ p < .10, ^{*} p < .05, ^{**} p < .01, ^{***} p < .005



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CURRICULUM/EDUCATION RELATED

TEACHING EMPLOYMENT 1989-present *NC Professional Educator License #964676 (Exp.2021): Latin 9-12, French K-12, Bible 9-12.* Currently: Online Latin Instructor, **Mitchell Community College**, Statesville, NC

- Jul 1994-Jul 2013: Latin, French, Greek, Bible, History - MS and HS **Covenant Day School**, Matthews, NC
- Aug 1989-Jun 1994 Latin & French, **Lanier High School**, Jackson MS

OTHER EDUCATION/CURRICULUM RELATED EMPLOYMENT: May 2003-Aug 2020, **Consultant/Curriculum Specialist, In-Service Presenter**, Pearson Education (now Savvas); 2001-2012 **Consultant, Writer, Editor** for 2009 *Ecce Romani* revision, Pearson Prentice Hall; Nov 2007-present **NCDPI: Data Review Committee Member, NCVPS - Latin Curriculum Review; Proficiency 201 Project Team; Essential Standards Development; Textbook Evaluation Criteria; Standards Setting for NC Latin Praxis Test.**

WL Education Presentations/Inservice Presentations: 1993-present - 65+ papers or presentations at conferences of education professional organizations, including: American Classical League (ACL) American Council on the Teaching of Foreign Languages (ACTFL), Classical Association of the Middle West and South (CAMWS), Foreign Language Association of NC (FLANC), Mississippi Foreign Language Association (MFLA), National Middle School Association (NMSA), North Carolina Classical Association (NCCA), Society for Classical Studies (SCS), Southern Conference on Language Teaching (SCOLT).

WRITER for National Exams: National Latin Exam (NLE), 2020-2023; ACTFL Latin Interpretive Reading Assessment (ALIRA) 2017-present; CAMWS Translation Exam Committee, 2020-present

AWARDS and SCHOLARSHIPS: 2014 [ACL Merita Award](#); 2013 [FLANC Honorary Life Member Award](#); 2007, 2011, 2012 - FLANC Top Ten Presenter; 2001, 2005 NCCA Research/Travel Award; 2001 Gold Chalice Winner on AbleOne Education Network's Classics Technology Center.

GOVERNANCE RELATED

1. PROFESSIONAL ASSOCIATIONS—SERVICE AND LEADERSHIP

FLANC Board 2001-2006, President, 2004-2005; First Vice President and Program Chair 2003-2004.

SCOLT Board: 2009-2017, President, 2012-2013, Representative to ACTFL Board 2015-2017, Advocacy Director, 2009-2012 (entailing visits to Congress)

ACL: Chair, ACL Centennial Planning Committee, 2016-2019; Member, Professional Resources Task Force, 2016-present; Member, Annual Institute Program Committee, 2021-present;

CAMWS: Vice President Southern Section (SS) 2008-2010; Member, Travel Awards Committee 2008-2011

NCCA Board: Sec./Treas. 2020-2023; VP 2023-present; **National Committee for Latin and Greek Board - Outreach Chair; Mississippi Junior Classical League Board - State Chair, 1991-1993**

2. OTHER SERVICE/EMPLOYMENT

Covenant Day School Board of Trustees, Matthews, NC 2013–2023; **Moore County Education Expo - Co-Chair, 2022 - present;** Part-time announcer **Mississippi Public Radio** and **WDAV** Classical Radio Stations, 1990-1996; **National Endowment for the Humanities** Project Coordinator, Mississippi State Department of Education - 1992-1993.

KAREN MANNING

14 Princess Gate Drive | Whispering Pines, NC 28327 | 910.850.4295

Education

BSBA Marketing & BS in Commercial Design | Appalachian State University | Boone, NC

High School Diploma | Pinecrest High School | Southern Pines, NC

Work Experiences

Sandhills Community College | Director of Marketing and PR | July 2006 to Present

City of Fayetteville | Director of Creative Services | 2004-2006

Premier Advertising | Creative Director | 2001-2004

Spalding Worldwide | Graphic Artist | 1986-1987

Volunteer Experiences

Women's Ministry of Christ Community Church | Pinehurst, NC | 2017-present

Moore County School Choice Expo | Southern Pines, NC | 2023

CRU Academic Advisor | Sandhills Community College | 2017-present

Public Relations, Information and Marketing Association (PRIMA) Board

School Board of Village Christian Academy | Fayetteville, NC | 2000-2002

Christian Home Educators of the Sandhills (CHES) | Moore County, NC | 1996-1999

National Day of Prayer Coordinator | Southern Pines, NC | 1997, 1998, 1999



Deborah Lawson

Business Profile

With the goal of working in a professional environment that would allow me to utilize my communication and public relations skills, I am in search of a company that will challenge me and allow me to grow in a managerial, marketing or sales position. In the last 10 years, I have hosted many events and spent time within and among local business people, professionals, and local retirees to successfully raise funds to build a gymnasium, a stage, and begin a fund for a large school building. I have lead capital campaigns and other fundraising activities, completed feasibility studies, polled the community, and marketed projects. The total raised from these efforts is over \$6 Million dollars in 10 years.

Working in a busy office environment that would allow me to use my organizational and management skills as well as my research, marketing and sales talents would be ideal.

Experience

2012- March 2023

St. John Paul II Catholic School

Director of Institutional Advancement

Office Manager, Admissions Director,

Director of Marketing

As part of the leadership team, and office manager, I have used my organizational and multi-tasking skills to successfully grow the school through community outreach, marketing and development. I have successfully managed several calendars, planned large events for over 400 guests, and raised over \$6 Million in 10 years as Advancement Director.

Helped maintain and kept confidential records for students and employees. Worked directly with HR with on-boarding staff and faculty. Handled and prioritized calls to the school, the principal and the staff. Designed and produce a weekly newsletter for the over 30 staff members and over 160 families of the school.

2010- 2012

Wells Fargo Mortgage, Southern Pines

Mortgage Loan Officer

Met with clients from all over Moore County to help them secure mortgages and refinances. Maintained a database of homes and borrowers, to keep in contact.

2008-2010

Berkshire Hathaway Real Estate. Southern Pines, NC

Real Estate Sales

Worked with Buyers and Sellers throughout Moore County to aid in home sales or purchases. Sold lots, land, single family homes, horse farms, and commercial properties. Marketed and created visual and digital aids to help the buyers and sellers, Maintained a large client database for use with contact and follow up after transactions.

2000 - 2008

Lawson & Greenleaf Real Estate, Southern Pines

Broker/ Manager/ Owner

Hired and helped train over fifteen Real Estate Agents. Successfully sold over \$10 Million in Real Estate yearly. Handled payroll, bookkeeping, marketing and maintained a sales position. Worked with local offices (Town of Southern Pines, Pinehurst, Cameron & Carthage) to help clients obtain permits needed to meet their needs. Found land and commercial location sites for a daycare center, a school, Veterinary clinic, and small shops, as well as sold many homes throughout the county.

References

Monsignor Jeffrey Ingham

Founder, St. John Paul II School,
Pastor, St. Luke's Parish Raleigh, NC

Phone 919-848-1533:

Rusti Welch

BOD, Foundation for First Health

Phone: 910-603-3701

Email: rusti.welch@me.com

Contact

Phone

910-215-4099

Email

deborahlawson@nc.rr.com

Address

205 Pine Needles Lane
Southern Pines, NC 28387

Education and Licenses

1988

BA Journalism/ Public Relations Minor: Russian Studies

St. Michaels College
Winooski, VT

1995 to Present

Licensed Real Estate Agent, NC

2010 - 2012

NMLS Licensed Mortgage Broker

Proficiencies

- Microsoft Office
- Canva Create and Design
- Adobe Creative Cloud
- Donor Perfect Database Management
- Constant Contact Communication
- Strong office administration skills

Community Positions

1998-2001 BOD, Bethany House

2001-2002 BOD, Southern Pines Business Association

2006-2011 BOD, Sandhills Children's Center

2014-2020 BOD, LifeCare Pregnancy Center

Currently, Pinecrest High School, SIT
(School Improvement Team)

Rebecca G Graham

13 Lassiter Ln, Pinehurst NC 28374

336-963-7239

beckygraham237@gmail.com

EDUCATION: BS Mathematics Appalachian State University 1975

JOB EXPERIENCES:

Sandhills Community College

2007-2010 GED Instructor

Helping students obtain prepare for GED exams.

2010-2023 Data Management Analyst

Analyzed data and completed Federal and State reporting.

Distribution Technology

1999-2007 Industrial Engineer

Planned building and product layouts to efficiently use available space.

Performed time studies to document efficient work procedures.

Sequa Chemicals

1991-1998 Technical Trainer

Conducted technical training to meet OSHA requirements.

Documented safe job procedures.

Burlington Industries & Campus Sportswear

1977-1990 Industrial Engineer

Performed time studies to determine most efficient job procedures.

Planned building and product layouts to efficiently use available space.

Worked with contractor when expanding the distribution center.

Chesterfield High School

1975-1977 Taught Algebra II, Algebra III, Geometry, and General Math

OTHER EXPERIENCES

Chester County SC Board of School Trustees 1991-1998

ARIANE J. MESTELLE

305 Oakhurst Vista
West End, NC 27376
832-360-5482

biermanntx@gmail.com

PROFESSIONAL EXPERIENCE

The Vibe Wellness Studio

Apr 2016 – Jan 2019

President and Owner

- ◆ Researched, developed and executed business plan from conception
- ◆ Initially performed and then managed all accounting functions of the firm (A/P, A/R, payroll, cash flow projections, budgeting, etc.)

SNC-Lavalin Group

Jan 2014 – Apr 2016

Director, Sales

- ◆ Develops and implements strategic marketing plans and sales plans and forecasts to achieve corporate objectives for products and services.
- ◆ Develops and manages sales operating budget and sales compensation plan
- ◆ Directs sales forecasting activities and sets performance goals accordingly.
- ◆ Analyzes and controls expenditures of division to conform to budgetary requirements.
- ◆ Meets with key clients, assisting sales representative with maintaining relationships and negotiating and closing deals.

Valerus Compression Services, LP

Sept 2010 – Jan 2014

Director of Sales/Ops Analysis & Strategy

- ◆ Responsible for all analytics, budgeting, compensation plans, and reporting for Sales

Exterran Holdings, Inc.

Aug 2007 – Sept 2010

Business Intelligence Director

- ◆ Manage, create, and maintain monthly/quarterly activity reports by product line and other key performance indicators provided directly to Executive Leadership Team (COO, CFO, President, and Senior VP's)

Hanover Compressor Company

Nov 2004 – Aug 2007

Senior Marketing Analyst (Apr 2006 – Aug 2007)

- ◆ Worked directly for Western Hemisphere Senior Vice President providing data and insight on Sales, Operations, and Marketing performance

Financial Analyst (Sept 2005 – Apr 2006)

- ◆ Create and provide analytics for all operating activity to upper management

Tympany Medical, Houston, TX

Nov 2002 – Feb 2004

Business Development / Financial Controller

- ◆ Travel to West coast to present to investors and potential strategic customers / responsible for all financial reporting of firm

Argus Corporation, Redford, MI

Sept 2001 – Sept 2002

Controller

- ◆ Responsible for all accounting activities of firm

Dana Corporation (*Financial Management Training Program*)

Jun 1998 – Sept 2001

Assistant Controller, Plymouth, MN (Mar 2001 – Sept 2001)

- ◆ Coordinated all aspects of budgeting and forecasting, operational expense analysis and maintenance, financial closing and reporting

Internal Auditor, Toledo, OH (Jun 2000 – Mar 2001)

- ◆ Performed detailed review and analysis of internal operating controls, financial reporting systems, inventory, and supporting documentation

Cost Accountant / Plant Trainee, Milwaukee, WI (Jun 1998 – Jun 2000)

EDUCATION

HILLSDALE COLLEGE, Hillsdale, Michigan

Bachelor of Arts – Finance (1998)

Minor: German

Graduated: Cum Laude

Ariane Mestelle
832-360-5482

Sharon S. Castelli, Ed.D
220 Ridgeview Road, Southern Pines, NC 28387
(H) 910-246-9990, (C) 910-986-2332
sharon.s.castelli@gmail.com

Uwharrie Charter Academy:

2020-Present **Superintendent:** Serves as Superintendent of Schools for an estimated 1,900 children in grades K-12, over 220 staff (certified and classified).

- Serves on Board of Directors, Academic Excellence, Governance, Finance, and Executive Committee
- Serve on Superintendent's Cabinet and Leadership team
- Provide professional development for principals, assistant principals and teachers as identified
- Oversees the operation and function of the community and advise on district policies
- Directly responsible for and ensures compliance with local policies, federal and state laws
- Representative on school board and district, state, public and governmental functions
- Identify external professional development providers based on school/teacher needs and instructional walkthroughs
- Responsible for a 45M growth project, creating a new High School and Career Academy
- Serves on multiple committees to ensure UCA has equitable representation in the community: Asheboro Chamber of Commerce; United Way Board Member; Mid-State Rotary; Randolph Partnership for Children; RCC Mental Health and Substance Abuse Symposium; and Fatality Prevention Committee
- Works on grants and all federal, state, and local finances; ensures compliance and provides feedback on all spending and allocations of resources
- Updates all handbooks, standards of operations, calendars and provides guidance on school letters
- Works with school and EC attorney for any issue to ensure compliance

EDUCATION:

Wingate University: Ed.D, School Administration and Leadership, Wingate NC, 2018.

University of North Carolina: School Administration License, Chapel Hill NC, 2011

Harvard University: ALM, Psychology, Cambridge MA, 2007.

Charleston Southern University: BS, Elementary Education, Charleston SC, 2003

Community College of the Air Force: AA, Social Services, AA, Information Management, Maxwell Air Force Base (AFB) AL, 1997

LICENSURE / CERTIFICATIONS:

Superintendent License: North Carolina, 2017

Special Education Certification: North Carolina, 2017

Administrative License: North Carolina, 2011

Teacher Certification: North Carolina, 2005

Dr. BethAnn Pratte

360 Grove Road, Southern Pines, NC 28387

bethannpratte@gmail.com

www.linkedin.com/in/bethannpratte

717.870.2557

EDUCATION

Degree and Certifications

- Doctorate in Educational Administration: Immaculata University
 - Superintendent License
- Master's Degree in Curriculum and Teaching: Penn State University
 - Supervisor of Curriculum and Instruction License
- Educational Leadership Certificate Program: Western Maryland College
 - Principal K-12 License
 - Exceptional Children Program Administrator
- Bachelor's Degree in Elementary Education: Millersville University
 - Pennsylvania Instructional II Elementary Education K-8 Certificate
- Dyslexia Practitioner Certificate: Wilson Language, Fitchburg State, and AIMs Academy
- The 7 Habits of a Highly Effective People Certified Trainer

Post-Doctoral: Courses, Conferences, Studies, & Certificates

- Neurodevelopment of Words; Ocala, FL; Trinidad, WI
- Wilson Reading Systems Level II Completion: Conshohocken, PA
- Research to Practice Symposium(s) Haskins Lab: Mathematics and Literacy: Conshohocken, PA
- WrightsLaw Advocacy Training(s): Various locations
- Wilson Reading Systems Level I Completion Certificate: Conshohocken, PA
- AIMs Academy: Early Literacy Development Conference(s): Conshohocken, PA
- Motivation: The Art & Science of Inspiring Classroom Success: Gratz College
- Dealing with ADHD Type Behaviors in the Classroom: Gratz College
- Learning & the Brain Conference(s): Various locations
- International Mind, Brain, and Education Summit: Philadelphia, PA
- Mind, Brain & Education Institute Certificate: Harvard University: Cambridge, MA

EXPERIENCE

- **Neurodevelopment of Words; LLC** *Dyslexia Interventionist* • 2022-Present
- **Anchor Educational Services** *Educational Service Provider* • 2006-2023
- **Campbell University: New Buies, NC** *Student-teacher Supervisor; Ed-TPA Supervisor* • 2021
- **York Suburban School District York, PA** *Elementary Teacher; Leadership; Professional Development* • 1998-2018
- **York College of Pennsylvania** *Adjunct Professor: MED503 Curriculum Trends and Issues Course* • 2008-2019
- **Penn State University York Campus** *Adjunct Professor and Course Designer* • 2005-2015
- **Heritage Hills Kidz Camp** *Curriculum Director; Professional Development; Board Member* • 2010-2013



CALEB CRISCOE

CYBERSECURITY PROGRAM MANAGER

PROFILE

Experienced cybersecurity professional nearing 2 decades of leadership and technical expertise in implementing successful information security programs. Developed and implemented IT governance policies and procedures in alignment with industry standards and best practices. Conducted IT governance assessments to identify gaps and opportunities for improvement, and developed remediation plans to address identified issues. Displays a clear understanding of the organization's mission. Advances organizational goals while maintaining the highest ethical standards.

CONTACT

PHONE:
910-690-4313

EMAIL:
CALEBCRISCOE@HOTMAIL.COM

LINKEDIN:
LINKEDIN.COM/IN/CALEBCRISCOE

EDUCATION

Liberty University
BS – Management Information Systems
Graduation: 2015

WORK EXPERIENCE

Cofense
Sr. Information Security Program Manager
2018 – Present

Ameritox
Sr. IT Security Engineer
2016 – 2018

FirstHealth of the Carolinas
Sr. Network Security Engineer
2008 – 2016

U.S. Air Force, 97th Communications Squadron
Network Infrastructure Technician
2004 – 2008

SKILLS

- Adaptability
- Communication
- Leadership & Mentoring
- Problem Solving
- Project Management
- Risk Management
- Teamwork
- Training & Awareness

Signature Page

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

Print/Type Name: Caroline Kelly

Board Position: Chair

Signature: 

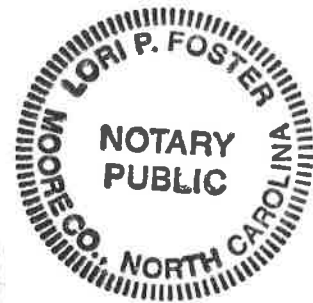
Date: 4/27/2023

Sworn to and subscribed before me this 27 day of April, 2023.

Notary Public: Lori P. Foster

Official Seal:

My commission expires: April 9, 2028.





NORTH CAROLINA

Department of the Secretary of State

To all whom these presents shall come, Greetings:

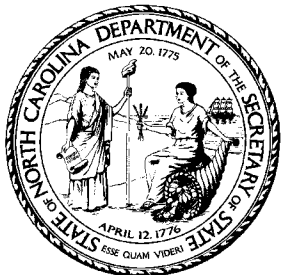
I, ELAINE F. MARSHALL, Secretary of State of the State of North Carolina, do hereby certify the following and hereto attached to be a true copy of

ARTICLES OF INCORPORATION

OF

HIGHLANDS CHARTER ACADEMY

the original of which was filed in this office on the 19th day of April, 2023.



Scan to verify online.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 19th day of April, 2023.

Elaine F. Marshall

Secretary of State

**ARTICLES OF INCORPORATION
OF HIGHLANDS CHARTER ACADEMY**

The undersigned, being a natural person of the age of eighteen (18) years or more, hereby makes and acknowledges these Articles of Incorporation for the purpose of forming a non-profit corporation under and by virtue of the laws of the State of North Carolina as contained in Chapter 55A of the North Carolina General Statutes, as amended (the “NCA”).

ARTICLE I

The name of the corporation is Highlands Charter Academy (the “Corporation”).

ARTICLE II

The period of duration of the Corporation shall be perpetual unless sooner dissolved in accordance with the NCA.

ARTICLE III

The Corporation will be a charitable or religious corporation within the meaning of Section 1-40(4) of the NCA.

ARTICLE IV

The Corporation is organized and operated exclusively for the sole benefit of, to perform the functions of, and to carry out the charitable, educational and benevolent purposes described in Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, (the “Code”) including, but not limited to, operation of a charter school and those other activities more particularly set forth in the bylaws.

The activities of the Corporation shall be limited to only those activities allowed by a non-profit organization with tax-exempt status under Code Section 501(c)(3) or the corresponding provisions of any successor federal tax code.

No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to, its directors, trustees, officers or other private persons, except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered to the Corporation and to make payments and distributions in furtherance of the purposes set forth in this Article IV 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 or intervene in any political campaign on behalf of, or in opposition to, any candidate for public office. Notwithstanding any other provision of these Articles of Incorporation, the Corporation shall not carry on any activities not permitted to be carried on (a) by a corporation exempt from federal income tax under Code Section 501(c)(3), as amended, or the corresponding section of any successor federal tax code, or (b) by a corporation, contributions to which are deductible under Code Section 170(c)(2), or the corresponding section or any successor federal tax code.

ARTICLE V

The Corporation will not have members.

ARTICLE VI

The street address of the initial registered office of the Corporation is 3313 Kelly Plantation Road, Carthage, North Carolina 28327 (Moore County). The mailing address of the initial registered office of the Corporation is 3313 Kelly Plantation Road, Carthage, North Carolina 28327 (Moore County). The name of the registered agent at the street and mailing address for the Corporation is Caroline Kelly.

ARTICLE VII

The street address of the principal office of the Corporation is 3313 Kelly Plantation Road, Carthage, North Carolina 28327 (Moore County). The mailing address of the principal office of the Corporation is 3313 Kelly Plantation Road, Carthage, North Carolina 28327 (Moore County).

ARTICLE VIII

A director shall not be personally liable to the Corporation for monetary damages arising out of any action, whether by or in the right of the Corporation or otherwise, for any breach of duty as a director, except for liability with respect to (a) acts or omissions that the director at the time of the breach knew or believed were clearly in conflict with the best interests of the Corporation, (b) any liability under Section 8-32 of the NCA or Section 8-33 of the NCA, and (c) any transaction from which the director derived an improper personal financial benefit. As used herein, the term "improper personal benefit" does not include a director's reasonable compensation or other reasonable incidental benefit for or on account of service as a director, officer, employee, independent contractor, attorney or consultant of the Corporation. If the North Carolina General Statutes are amended after the date of these Articles to authorize corporate action further eliminating or limiting the personal liability of directors, then the liability of a director of the Corporation shall be eliminated or limited to the fullest extent permitted by the North Carolina General Statutes, as so amended. No amendment or repeal of the provisions of this Article VIII shall apply to or have any effect on the liability or alleged liability of any director of the Corporation for or with respect to any act or failure to act on the part of such director occurring prior to such amendment or repeal. The provisions of this Article VIII shall not be deemed to limit or preclude indemnification of a director by the Corporation for any liability which has not been eliminated by the provisions of this Article VIII.

ARTICLE IX

In the event of the termination, dissolution or winding up of the affairs of the Corporation in any manner or for any reason whatsoever, the Directors shall, after paying or making provision for payment of all liabilities of the Corporation, distribute all of the remaining assets and property of the Corporation to such organization or organizations organized and operated exclusively for charitable, educational or scientific purposes under Code Section 501(c)(3) or Code Sections 170(b)(1)(A) (ii) and (iii) as may be directed by the Directors of the Corporation. Any such assets not so disposed shall be disposed of by the Superior Court of Moore County, North Carolina exclusively to such eligible organization or organizations as said court shall determine, that are organized and operated for such purposes pursuant to Code Section 501(c)(3) or to such local, state or federal governmental entities for such purposes.

ARTICLE X

The affairs of the Corporation shall be managed and governed by the Board of Directors of the Corporation. The Board of Directors may delegate any management functions it deems advisable. The number and method of election of directors, meetings, and other matters relating to directors shall be determined by the Bylaws subject to the provisions of this Article.

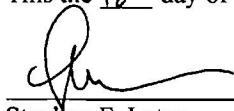
ARTICLE XI

The name and address of the incorporator is Stephen F. Later, 120 Applecross Road, Pinehurst, North Carolina 28374.

ARTICLE XII

These Articles of Incorporation shall be effective upon filing in the office of the North Carolina Secretary of State.

This the 12th day of April, 2023.



Stephen F. Later
Incorporator

<u>Board Member Name</u>	<u>Board Title</u>	<u>Phone Number</u>	<u>Email Address</u>	<u>County of Residence</u>	<u>Current Occupation</u>	<u>Past or Present Professional Licenses Held</u>	<u>Any disciplinary action taken against any of these professional licenses?</u>
Caroline Kelly	Chair	704-779-0161	cafskelly@gmail.com	Moore	Retired	NC Educator's Licence K12	None
Karen Manning	Vice-Chair	910-850-4295	manningkm@gmail.com	Moore	Director of Marketing Sandhills Community College	None	None
Becky Graham	Treasurer	336-963-7239	beckygraham237@gmail.com	Moore	Retired	Secondary Education-Math 1975	None
Ariane Mestelle	Secretary	832-360-5482	mestellenc@gmail.com	Moore	Homemaker	None	None
Dr. BethAnn Pratte	At Large	717-870-2557	bethannpratte@gmail.com	Moore	Interventionist	Superintendent, Curriculum Instructional Specialist, Principal, ar	None
Deborah Lawson	At Large	910-215-4099	deborahlawson.sp@gmail.co	Moore	Fundraising Consultant/Realtor	Licensed Real Estate Agent, NC	None
Dr. Sharon Castelli	At Large	910-986-2332	sharon.s.castelli@gmail.com	Moore	UCA Superintendent	Elementary Education, Administration, Superintendent	None
Caleb Criscoe	At Large	910-690-4313	calebcriscoe@hotmail.com	Moore & Chatham (temporarily)	Cybersecurity Professional	None	None

<u>Area of Proposed Coverage</u>	<u>Proposed Amount of Coverage</u>
Comprehensive General Liability	\$1,000,000.00/occurrence
Officers and Directors/Errors and Omissions	\$1,000,000.00/occurrence

Property Insurance	
Automobile Liability	\$1,000,000.00/occurrence
Crime Coverage - Minimum/Maximum Amour	\$250,000.00 \$250,000.00
Worker's Compensation	\$500,000.00

Other Coverage
Total Cost



Cost (Quote)

\$8.50- 12.00 per student for the year = \$1,020 - \$1,440

\$12 – 15 per a student for the year = \$1,440 - \$1,800

.15 - .25 (Moore County is more costal) per \$100. If

you have \$1,000,000 in property values (building + contents + business income) = \$1,500 - \$2,000

\$600 - \$850 per a bus for full coverage (newer buses cost more to insure)

\$250 average for \$500,000 in coverage

.30-.35 per \$100 of payroll. If payroll is over \$500,000 - \$1,500 - \$1,750

Umbrella: roughly \$1000 - \$1200 per every \$1,000,000 layer (this goes over the general liability, sexual abuse, educators legal, and auto).



North Carolina General Assembly
Senate

SENATOR THOMAS M. MCINNIS
SENATE MAJORITY WHIP
21ST DISTRICT

OFFICE ADDRESS: 314 LEGISLATIVE OFFICE BUILDING
300 N. SALISBURY STREET
RALEIGH, NC 27603-5925
TELEPHONE: (919) 733-5953
EMAIL: TOM.MCINNIS@NCLEG.GOV

COMMITTEES:

AGRICULTURE, ENERGY, AND ENVIRONMENT
APPROPRIATIONS/AGRICULTURE, NATURAL/ECONOMIC RESOURCES
APPROPRIATIONS/DEPT OF TRANSPORTATION, CHAIRMAN
APPROPRIATIONS/BASE BUDGET
COMMERCE AND INSURANCE
EDUCATION/HIGHER EDUCATION
JOINT LEGISLATIVE COMMITTEE ON GOVERNMENTAL OPERATIONS
RULES AND OPERATIONS OF THE SENATE
TRANSPORTATION, CHAIRMAN

April 21, 2023

Ms. Caroline Kelly
3313 Kelly Plantation Road,
Carthage, NC 28327

Dear Ms. Kelly,

I would like to take this opportunity to express my support for Highlands Charter Academy. Charter schools address the different needs of the community and are in demand as parents know what is best for their children. Indeed, surveys confirmed parents prefer a choice in education with three in four parents desiring more public charter school offerings in their area.

I support the right for North Carolina families to choose the means and place of their children's education. As Senator I sponsored two bills for charter schools in 2017 and supported three charter school funding bills during the 2021-2022 session that represent local and state investments in our charter schools. Last year Gov. Roy Cooper issued a proclamation honoring National School Choice Week acknowledging educational options enhance North Carolina's economic prosperity and the welfare of our diverse communities, while affirming the responsibility to provide all children in North Carolina access to high-quality options. I, too, believe families should have the right to choose the educational model that best suits their children's needs with the option of public charter schools, and in particular Highlands Charter Academy.

Our nation's children are of the utmost importance to the future of our nation, freedoms, and way of life as we know it now. I commend Highlands Charter Academy for their commitment to deliver outstanding educational option addressing the needs and desire of their community.

With kindest personal regard, I remain,
Sincerely,

Senator Thomas M. McInnis
Senate Majority Leader
District 21: Cumberland and Moore Counties





Dear School Board Members,

The CARE Group, Inc. gives its full support and recommendation for the Highlands Academy public charter school. We feel the addition of this charter school will immensely benefit the families of Moore County, as well as our community as a whole.

Quality education is something that we feel strongly about here at The CARE Group, and for 30 years have worked closely with our schools in Moore County to help provide educational enrichment and support.

We feel that the classical curriculum that the Highlands Academy School intends to utilize will greatly enrich the students, families and community that surround it, and seeks to instill the same principles of character that we hope to encourage here at the CARE Group, as well. We feel Highlands Academy will offer an academic approach that is not currently available in our area, and one that we hope our families can have an opportunity in which to participate. We feel strongly that a good education is something that should be available for all families in our county.

We happily give our support to the opening of Highlands Academy, and see it as a great benefit and incredible resource for Moore County.

Thank you for your consideration as we all work together to offer a strong future to the children of Moore County.

Sincerely,

Joyce Clevenger
Executive Director
The CARE Group, Inc.
joyce@moorebuddiesmentoring.com
(910) 692-5954

*Moore County Literacy Council/Moore Buddies Mentoring
575 SE Broad St Southern Pines, NC 28387 910-692-5954
PO Box 1966, Southern Pines, NC 28388*



North Carolina General Assembly
House of Representatives

REPRESENTATIVE NEAL JACKSON
78th District

Office: 603 Legislative Office Building
300 N. Salisbury Street
Raleigh, NC 27603-5925
Phone: (919) 715-4947
Email: neal.jackson@ncleg.gov

COMMITTEES

Rules, Calendar, and Operations of the
House
Banking
Education - Universities
Finance
State Personnel

April 21, 2023

Ms. Caroline Kelly
3313 Kelly Plantation Road,
Carthage, NC 28327

Dear Ms. Kelly,

I am writing to express my support for the Highlands Charter Academy. This school will join other charter schools in providing choices tailored to the specific needs of local families. North Carolinians have proven time and again that they prefer school choice and more charter schools. This academy will give the good people of Moore County an education option that has been much sought after.

The families of Moore County will benefit from the improved options for education opportunities that the Highlands Charter Academy will provide. By following the classical Hillsdale College model, students will receive a rich and rigorous education. This school will equip students with strong moral character in addition to a fantastic learning foundation. I represent Moore County and hear from all over the area how parents are excited about this new charter school, and I am excited to see the bright future of this project.

The students of my district are a top priority, and this school will provide a sound education for generations. I am grateful for all the work that Highlands Charter Academy is doing to provide education options for this community.

Kindest regards,

Representative Neal Jackson
District 78: Randolph and Moore Counties



NICK PICERNO
CHAIRMAN

COUNTY OF MOORE BOARD OF COMMISSIONERS

P.O. BOX 905 / ONE COURTHOUSE SQUARE
CARTHAGE, NC 28327
TELEPHONE: 910.947.6403

April 25, 2023

North Carolina Department of Public Instruction
Office of Charter Schools
6301 Mail Service Center
Raleigh, NC 27699-6301

To Whom It May Concern:

I would like to express to you my full support for Highlands Academy, a proposed Moore County public charter school. This tuition-free school aims to “provide a rich and nourishing classical liberal arts education where students will flourish through intellectual rigor, and the encouragement of human virtue and responsible citizenship. They will be equipped with the tools to be self-disciplined and intellectually competent, with strong moral character and civic responsibility.”

The school founders have thoughtfully considered its planned location in the northern area of Moore County, where currently there are only low-performing public school options for our students. We want the very best for all our Moore County children, and Highlands Academy provides parents with an additional choice in their children’s education and provides their children with an opportunity to thrive.

I am grateful to those involved in the development of Highlands Academy for their commitment to improve the lives of Moore County children and therefore, our future. Thank you for your consideration of their application, for which I fully support and recommend approval.

Sincerely,

Nick Picerno, Chairman
Moore County Board of Commissioners

Classical Education: An Attractive School Choice for Parents

Brandon McCoy

PROJECT MANAGER, EDUCATION POLICY
Manhattan Institute

Introduction

Parents who are looking for an alternative to traditional public schools have an option that fell out of fashion in this country a long time ago. This option—called “classical education”—differs profoundly from the instruction offered by modern district public schools. It is heavily oriented toward the liberal arts, guided by the Western canon, and grounded in Greek and Roman traditions of academic excellence.

While parents give good teachers and strong academics priority in evaluating a school, they also rate safety highly and consider extracurricular activities.¹ Educational philosophy or religious vocation is often highly valued as well. In a multicultural and diverse society like the U.S., every family will undoubtedly possess different values. Classical education can serve some children—including urban minority students—better than the progressive models favored by the majority of local district public schools.

This issue brief seeks to add to the discussion of educational pluralism by highlighting the history, features, and successes of the classical education model. The model is unique for its emphasis on building the student to be a scholar and an active citizen. Classical schools come in the form of private and charter schools, homeschooling, and micro-schooling. This paper will profile classical-model charter schools in New York City, Washington, DC, and Nashville. Each one has a majority-minority student body whose state test scores match or exceed their respective district public school’s average.

ABOUT US

The Manhattan Institute is a think tank whose mission is to develop and disseminate new ideas that foster greater economic choice and individual responsibility.

Classical Education: An Overview

Modern classical education is inspired by the ancient Greek and Roman traditions of art, literature, and language that are the foundation of Western civilization. During the medieval period, educators synthesized much of what endured from this tradition with the values of Christianity and established a framework to educate future generations.² The West’s theologians, statesmen, and philosophers were thus educated in the classical tradition.

Today, classical education is synonymous with “authoritative, traditional and enduring.”³ The teaching of ancient Greek and Latin languages and literature endures, but the designation “classical” has been broadened to include languages and literature beyond Rome and Athens that uphold the virtue of “excellence.” Educators today define classical education as an education that teaches the best of the West.

America’s first public school was the Boston Latin School, established in 1635 with the mission of preparing students for the rigor and substance of classical education in a college setting. Mastery of Latin was a requirement. In the next century, many of the country’s Founding Fathers and other early American leaders were classically instructed—fluent in Latin and other ancient languages and well versed in classic literature.⁴ Much like in the ancient and medieval periods of the West, education at any level was largely accessible only to the elite and wealthy.⁵

Public education as we understand it arose in the first half of the 19th century; the first state to mandate education was Massachusetts in 1852, and the last state to do so was Mississippi in 1918. Enrollment was not universal; according to the federal government’s National Center for Education Statistics, “roughly half of all 5- to 19-year-olds were enrolled in school” in the last half of the 19th century. Before the Civil War, “school enrollment for blacks was limited to only a small number in Northern states.”⁶

Educational institutions for blacks freed after the Civil War evolved in two distinct forms: one for industrial education, the other for the liberal arts. Notable figures such as Booker T. Washington promoted the former as the best way for black Americans to integrate into society. Aided by numerous benefactors, Washington founded a range of schools to train adolescents and young adults as masters of trades and future teachers in their communities. Notably missing from Washington’s industrial curriculum was instruction in the “dead languages.”⁷

Many activists, however, viewed a liberal arts education as the key to black Americans’ equal participation in political and social life, which would require integrating with even the college-educated elite of the time. In *The Souls of Black Folk*, W. E. B. Du Bois wrote that engaging in the study of works by figures such as Shakespeare and Aristotle would give black individuals the knowledge to liberate themselves.⁸ Thus, the first black public high school, founded in 1870 as Washington D.C.’s Preparatory High School for Colored Youth (presently called Dunbar High School), was rooted in the classical tradition.⁹ Segregated black high schools in the early to mid-1900s offered instruction that was heavily influenced by the liberal arts but offered both industrial and classical coursework to their students.¹⁰

Horace Mann, the mid-19th-century reformer who orchestrated the movement toward free public education across the country, believed that schools, while secular, should inculcate character and values in students, as well as a sense of allegiance to democracy and nationhood.¹¹ In the 20th century, however, educators within the Progressive movement, such as philosopher and psychologist John Dewey, believed that education should focus on present-day concerns and interactions between student and teacher for the larger purpose of encouraging democracy and social reform. Problem-solving, issue advocacy, experiential learning, and social change were at the core of progressive education. Its focus on the present made the student’s interests and desires equal to those of the teacher.¹² Thanks to the influence of Dewey and others, classrooms became more democratized but moved away from principles such as tradition, virtue, and authority.

Today, public schooling in the U.S. is influenced by many schools of thought. Some still model their curricula on ideals espoused by progressives such as Dewey. More recently, a movement toward teaching literature and history through a critical racial lens has evolved. Other schools teach in a way that downplays or ignores significant negative parts of America’s history.¹³ Because public schooling in the U.S. is highly localized and democratic, no single pedagogy dominates.

CONTACTS

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Contemporary Classical Education

Today's classical curricula can be found in homeschool environments, micro-school pods, private institutions, and public charter schools. In the religious school sector, classical education often incorporates biblical texts and training. These schools often brand themselves as classical Christian schools or classical academies and inculcate their students with a rigorous education and Judeo-Christian values.¹⁴ Some Catholic schools have also harked back to a classical model in teaching their tradition. While not representative of most Catholic schools, some parochial schools¹⁵ have made an effort to give parishioners the option of classical education, while some Catholic-affiliated networks¹⁶ have also created schools to offer a classical Catholic education.

Some of the most ardent supporters of classical education are in the homeschooling and micro-schooling movements. Homeschool programs such as *The Well-Trained Mind* are designed to give parents the information necessary to educate their children in a classical manner. Training in spiritual faith is usually a crucial aspect of their education, as it would be in a religious school.

However, classical education is *not* limited to private, religious, and home schools. Several public charter schools have adopted aspects of classical learning. These schools, particularly in urban areas, are designed to give students from disadvantaged groups a stronger educational foundation and a better shot at college readiness. While jurisprudence surrounding the U.S. Constitution's Establishment Clause prevents public charter schools from promoting the values of any particular religion,¹⁷ many classical charter schools incorporate secular "character training" into their curricula.

Three Stages of a Classical Education

American public schools aim for grade-level readiness beginning with kindergarten and ending in the 12th grade. Medieval Roman educators employed a broader model of primary education known as the "trivium."¹⁸ In a liberal arts education, the trivium refers to the teaching of the first three arts: grammar, logic, and rhetoric. Though practically all classical charter schools today employ conventional grade levels, this highly language-intensive structure influences today's classical educators, thanks to Dorothy Sayers's 1947 essay "*The Lost Tools of Learning*," which reintroduced the trivium to a modern audience.¹⁹

Grammar, the first stage, refers not to the rules of language, but to the youngest years of a child's education, during which the goal is to build a foundation for future learning by establishing a knowledge base.

The logic stage builds upon the grammar stage and teaches students how to outline and evaluate arguments. During the logic stage, students consider narratives from history and English literature (and the literature of other languages), and they practice explaining the facts of the world.

In the rhetoric stage, students learn how to express their thoughts. Using the knowledge acquired during the grammar stage, as well as the tools developed during the logic stage, they learn how to make their own arguments—both written and oral. Classical learning heavily relies on the Socratic method, pitting ideas and arguments against each other in pursuit of truth. By challenging properly skilled students to explore their ideas, a classical education imbues students with a desire to seek truth in all further education after leaving school.

On the surface, a modern classical curriculum might appear similar to a typical district school education: it includes math, science, English and language arts, history, the arts, and foreign languages. But the coverage of these subjects is distinctive.

English and language arts in a classical school are split into two subjects: reading and writing. Reading receives particular attention because it is the ultimate source of knowledge in all other subjects.²⁰ In many classical elementary schools, literacy is the ultimate goal for students. Writing also receives great focus because the written word is the chief way ideas are expressed and disseminated in the Western tradition.

Therefore, in the grammar stage, students are expected to comprehend phonics, develop vocabulary, and learn the structure of a sentence. Many of a student's early years are spent memorizing facts rather than developing original ideas. Toward the end of the grammar stage, exercises like diagramming sentences, writing in cursive, and writing brief expository sentences are used to ensure that students can demonstrate mastery of the foundations of the written word.

The logic stage expands students' knowledge of language arts by teaching them to explain the "why." Reading comprehension requires more of the student than parroting a written passage—careful analysis is essential. Students in the logic stage begin to read more challenging works that allow them to put these tools to the test. Middle school children learn the best of the Western canon, studying timeless works such as Shakespeare plays and novels like *To Kill a Mockingbird*.

In the rhetoric stage, students craft their arguments and express original ideas. Older students, having developed strong vocabularies and reading comprehension skills, graduate to more challenging works like Greek epics and 19th-century literature such as *Les Misérables*. Teachers in the rhetoric stage require students to critically analyze the meanings and arguments supported by a text, in addition to making arguments of their own.

A knowledge of history is regarded as the backbone of classical education because it accomplishes three objectives. First, history informs students of how we have arrived at the current moment. Second, it serves as a bulwark against arrogance, putting students' community and country into a proper context of the vast span of global civilization.²¹ Third, history provides examples of people's and civilizations' successes and failures, thus offering lessons to students who will be history makers in their own time.

In the grammar stage, history teaches students the basic facts of human civilizations. Young students memorize facts about various empires, leaders, wars, and movements. Such fact absorption provides students a solid foundation for eventual critical thinking and logical analysis.

In the logic stage, students begin to delve deeper, asking "why" human history developed as it did. Students may take on assignments that ask them why Napoleon failed to dominate the European continent, or why British taxes catalyzed the American Revolution. Students in classical schools often rely on primary sources rather than textbooks at this stage, in order to gain more fully the perspectives of historical figures.

Students in the rhetoric stage voice their perspectives on events and figures in history. Through essays or the use of oral methods such as Socratic dialogue, they defend or challenge historical points of contention. Students may, for example, critique or qualify the spread of Christianity throughout the Americas or debate the ethics of Communist regimes. By providing an environment in which students engage in disagreement and argumentation civilly, classical teachers help students hone their thinking skills in the pursuit of truth.

Math and science instruction is distinctive in classical curricula. As with language arts and history, math and science for students in the grammar stage are dominated by memorization of basic facts in preparation for future learning. Later stages of math and science present subjects such as calculus and physics—not unlike most district schools. However, when classical educators apply the principles of logic and rhetoric to math and science coursework, there is a broader agenda. For example, a biology teacher might organize a unit on plant domestication and discuss the evolution of agriculture and civilization. Classically educated students not only master the sciences but connect them to history and contemporary issues.

Classical schooling insists that the purpose of education is to cultivate a mind pursuant of truth. Classical schools often require coursework in Latin or Greek, music composition and practice, debate, and the visual arts. The mastery of ancient languages connects students to the ancient works they read in literature classes and the public figures they study in history. Study of the visual and performing arts grants students access to classical works and compositions, while also giving them avenues for self-expression.

Classical education demands that students strive for excellence in academics but also in areas such as self-discipline and accountability. This is why a major component of this model is often some form of ethics or character training. In the classical Christian tradition, religion classes serve this purpose. In a secular classical school, character training is often embedded within the curriculum and discipline standards, and it can be formalized in a civics course.

Ethics and character training are essential for two primary reasons. First, discipline and accountability are virtues in and of themselves, and classical education seeks to transform the whole student. Second, classical education is invested in ethics because proper character guides students on how to pursue truth. Students might question the need to study Latin or literature such as *The Aeneid*. “When will I need to use this?” is a common reaction to difficult or seemingly impractical lessons. But classical educators teach that virtue goes beyond mere practicality and aims to produce “a student who pursues excellence and moderation in all things.”²²

Perhaps the most significant distinction of a classical education is its insistence that specific values matter. Attempts at value-neutrality fail to produce an environment suitable for knowledge acquisition and dialogue.²³ Education requires a shared understanding of principles and fundamentals. Classical educators profess to inculcate in their students a particular way of digesting and interpreting facts and formulating and defending their own viewpoints.

Three Classical Education Charter Schools

As the U.S. grows more diverse, people desiring more inclusion and multiculturalism might be wary of advancing classical education. However, critics overlook the unifying aspects of classical education. Those engaged in the classics respect the importance of a common people having a shared language, base of knowledge, and history. Furthermore, classical educators recognize the mission of teaching many groups’ histories of the West.

The three charter schools profiled below share several features. They reflect the stages of the trivium across traditional grade levels; their demographics show that a classical education need not be culturally unresponsive and can reach students of all backgrounds; and standardized assessments of their students indicate that instruction in the classical fashion is academically rigorous and can meet contemporary expectations.

Nashville Classical Charter Schools

The American South has historically lagged in outcomes and opportunities for its children. The legacy of slavery—and Jim Crow laws especially—placed blacks at a profound educational disadvantage. One charter school in Nashville has a mission to teach the most disadvantaged children with a classical curriculum.

Charles Friedman founded Nashville Classical in 2011 and opened its doors in 2013. Citing lagging literacy and proficiency rates,²⁴ he believed that families in the Nashville area needed an alternative that could secure them the opportunities they deserved. Friedman settled on a curriculum rooted in the classics after consulting with numerous families and relying on his personal experience as a Teach for America Fellow in Philadelphia.

Nashville Classical's curriculum emphasizes the students' shared understanding of knowledge, while also offering them information about the world. The school employs E. D. Hirsch's Core Knowledge curriculum for its English and history classes.²⁵ Hirsch's program offers a foundation of knowledge for students to become good citizens by imparting cultural wisdom by studying historical figures and enduring literature. In Nashville Classical's English classes, students read various myths and folktales that have stood the test of time. Its history courses deliver deep, foundational knowledge of civilizations throughout world history. In kindergarten, students learn the lives of kings, queens, presidents, and other major leaders. In the third grade, students focus on ancient Rome and Greece.

"Curriculum should be a mirror and a window," Friedman says. Because Nashville Classical has a diverse student body, students bring to the school numerous perspectives and cultures. Friedman believes that the curriculum ought to reflect this reality while instilling wisdom from traditions that have spanned generations. He achieves this balance by promoting the liberal arts and the Western tradition and promoting works and historical figures from diverse backgrounds. While students learn the history of ancient Rome, the Renaissance, and the Founding Fathers, they also read novels such as *Esperanza Rising* and *The Autobiography of Frederick Douglass* to gain a variety of historical perspectives.

Nashville Classical emphasizes the arts in "liberal arts." Each student is required to take a course in music (either choir or a musical instrument) and a foreign language (Spanish or French). Beginning in kindergarten, students at Nashville Classical are exposed to the foundations of music composition and performance—both classical and contemporary—while also learning the basics of playing instruments and songwriting.

In many urban schools, behavioral disruptions have a deleterious effect on learning. Nashville Classical offers an environment that Friedman describes as "structured and intentional." Structure helps students understand why rules are in place, and clear standards help students answer the question, "What is the reason for everything?" Uniform policies, walking through the halls together, singing songs collectively as a school, and other rituals and routines promote a sense of community. Nashville Classical holds students to high standards in order to make them excellent students. In return, the school treats students as excellent. Each classroom is named after a college or university, and students are taken on field trips to campuses.

Nashville Classical posts higher rates of proficiency in ELA (English Language Arts) and math—both as a student body and by race—than district public schools. Compared with other public schools in the area, Nashville Classical more than doubles its students' proficiency rates in math (64.5% vs. 29.9%) and nearly doubles their proficiency rates in ELA (49.2% vs. 25.9%) (FIGURE 1). Black students at Nashville Classical also achieve far higher rates of proficiency in ELA and math compared with their counterparts elsewhere in the school district and the state as a whole. The student body itself is majority-minority: 62% are listed as black, and 8% are listed as

Hispanic²⁶ (the Metropolitan Nashville school district is 27% black and 10% Hispanic).²⁷ Given the results that Nashville Classical produces, Friedman’s goal of “[making] sure excellence is celebrated, and that excellence doesn’t have a color” has been achieved.

FIGURE 1

2019 Student Proficiency: Nashville Classical, Davidson County, and Tennessee

	ELA	Math	ELA (White)	ELA (Black)	ELA (Economically Disadvantaged)	Math (White)	Math (Black)	Math (Economically Disadvantaged)
Nashville Classical	49.2%	64.5%	74.4%	43.3%	36.5%	89.7%	57.4%	56%
Davidson County (Metropolitan Nashville)	25.9%	29.9%	43.9%	17%	14.3%	47.2%	20.2%	18.5%
Tennessee	33.7%	40.8%	40.6%	18.4%	18.6%	48%	23.9%	24.7%

Source: “Tread,” Tennessee Dept. of Education

South Bronx Classical (SBC)

The mission of this network of four charter schools is to provide some of New York City’s most disadvantaged students with a liberal arts education. Founded by Lester Long in 2006, South Bronx Classical (SBC) is located in a poor section of the city’s poorest borough.²⁸

The New York City public school system is the largest public school district in the country, serving more than a million students across five boroughs. The experiences of each student in the district vary widely by borough and by community district inside each borough. Four of New York State’s top-ranking 10 counties on the ELA and math assessments are in New York City: New York County (Manhattan), Kings County (Brooklyn), Queens County, and Richmond County (Staten Island). Bronx County is among the state’s lowest-ranked 10 counties on math assessments, and it ranks below average on ELA assessments.²⁹

The South Bronx’s public school students are much more likely to be from economically disadvantaged communities and are more likely to experience housing insecurity than students elsewhere in the Bronx. As a result, students in this area lag in educational attainment, with high school graduation rates lower than the rest of the city and state (FIGURE 2).

FIGURE 2

High School Attainment, South Bronx, 2018–19

2018–19 NYC Public Schools	4-Year HS Grad Rate (%)	Economically Disadvantaged (%)	Homeless (%)
NYC Geog Dist 7 (South Bronx)	66	92	16
Bronx County	71	86	13
NYC	77	75	8
NYS	83	57	4

Source: “Data,” NYS Education Dept.

For Lester Long, a classical education means getting back to the basics. He began his career in education as a NYC Teaching Fellow at a low-performing public school in the South Bronx. Long laments that education has been heavily theoretical and experimental since the rise of Dewey. His charter network runs on academic rigor, sequential learning, and having an adult in the room who can authoritatively help children with the necessary information for life. South Bronx Classical opened its second school in 2013, its third in 2015, and its fourth in 2017.

South Bronx Classical's curriculum relies on a Western-focused curriculum, using foundational texts as the basis for learning. In English classes, students read classic novels such as *Brave New World*, *1984*, and *Lord of the Flies*, along with a number of Shakespeare plays. Educators at SBC recognize that the U.S. has a particular history and that students within the network are mostly from minority cultures that have been overlooked in previous classical settings. Consequently, SBC has incorporated novels by writers such as James Baldwin and Toni Morrison—works that can add knowledge and wisdom to the history of the West.

Beyond core subjects, SBC relies on several curricular characteristics of classical education. Long insists on students learning Latin for three reasons. First, Latin is a gateway language to cultures around the world. Languages whose influence spans continents, such as Spanish, French, Italian, and Portuguese, are all rooted in Latin. Second, Long points to research showing that learning Latin correlates with higher SAT scores.³⁰ Third, according to Long, Latin signifies elite status. “There’s no reason these kids can’t be elite,” he says.

Students also take classes in art and music. They learn the foundations of visual art such as perspectives caused by shading and light. Students also gain practice in various media, including painting, drawing, Photoshop, and papier-mâché. An SBC student who attends kindergarten through eighth grade will take nine years of music classes, which are mandatory course requirements. Younger students at SBC begin by learning to play the recorder. By the time they are in middle school, they learn to play band or orchestral instruments, mastering compositions ranging from classical to contemporary.

SBC middle-school students take debate classes in which they sharpen their analytical skills. Long considers debate, properly practiced, a healthy style of disagreement: either one side will convince the other, or both sides will at least respectfully understand the other.

Academically, SBC stands far above schools in the surrounding South Bronx area. Each school in the network reflects nearly universal proficiency in core subjects such as ELA and math. SBC's results not only greatly surpass neighboring schools' but are positive outliers in New York State. SBC schools meet their mission of educating the community where they are located: 97% of SBC students are black or Hispanic, mirroring the 96% of black or brown students in the South Bronx geographic district (FIGURE 3).³¹

FIGURE 3

NYS Education Dept. Grade 3–8 Test Scores, 2018–19

	ELA (Black)	ELA (Hispanic)	ELA (Economically Disadvantaged)	Math (Black)	Math (Hispanic)	Math (Economically Disadvantaged)
SB1	90	90	90	96	97	97
SB2	NA	88	89	NA	95	94
SB3	98	100	99	100	100	100
NYC Geog Dist 7 (South Bronx)	30	31	30	21	27	26
Bronx County	37	34	34	33	32	32
NYC	35	37	41	28	33	39
NYS	35	36	36	32	35	37

Source: “Data,” NYS Education Dept.

Note: No data are available for SB4.

Washington Latin Public Charter School

Washington Latin was established in 2006 to provide a British-style independent education (referred to as “public school” in the U.K.)³² to students in America’s capital city. Today, formality, uniformity, and the humanities are emphasized in its instruction, and the educational curriculum is classical. Students are not only expected to acquire knowledge but are also expected to become virtuous students and principled citizens of their community.

Washington Latin utilizes the Socratic method, allowing students to express their own reasoning but have their opinions challenged, civilly, in the common pursuit of truth. For example, in an upper-level English class, students compare and contrast the story of Odysseus with Ralph Ellison’s *Invisible Man*. Oral discussions like this not only allow students to hone their craft of argumentation but also help connect lessons of the past to the present.

According to Washington Latin’s outgoing principal Diana Smith, Socratic dialogue commonly appears in humanities courses like English and history but also in STEM classes. In a chemistry class, Smith says, students may discuss the real-world implications of advancements in nuclear technology. While learning geometry, teachers may incorporate lessons of architecture, so that students might reflect on the beauty of math. Doing so intends to give students a deeper appreciation of the sciences and mathematics.

Students are required to take two years of a foreign or ancient language. Latin and Greek are featured, but French, Arabic, and Chinese are offered as well. Smith believes that it is necessary for students to study these languages because doing so connects students to the various cultures and literature that they will encounter while enrolled.

Washington Latin incorporates character and moral lessons into its school disciplinary policies. Smith notes that students learn leadership skills and conflict resolution: older students often serve as mentors and play a prominent role in conflict mediation between their younger classmates. Students actively correct behavioral deviations from school policy through the use of restorative practices. For example, Smith says, if a student throws food in the cafeteria,

mentoring students will require the student to address the infraction, perhaps by cleaning the cafeteria as restitution. Students earn trust from teachers and administrators and become active participants in the cultivation of good character.

The school has a 90% four-year graduation rate, compared with DC's 69% graduation rate in the traditional public high schools. The student body performance on the District's standardized Partnership for Assessment of Readiness for College and Careers (PARCC) exams³³ reflects the intensive focus that the school places on the humanities. Students in both the middle (grades 5–8) and upper (grades 9–12) schools exceed rates of proficiency in the Washington, DC, public school district on ELA assessments for black and white students. While math scores on average at Washington Latin surpass those in the general populations, they lag at the high school level.

FIGURE 4

Washington Latin PARCC Proficiency, 2018–19

	ELA	Math	ELA (White)	ELA (Black)	Math (White)	Math (Black)
Washington Latin—Middle	63.4%	48.1%	80.9%	41.4%	66.9%	27.6%
Washington Latin—Upper	83.1%	41.3%	100%	74.2%	62.5%	10.7%
DC	37.1%	30.5%	85%	27.8%	78.8%	21.1%

Source: DC Office of the State Superintendent of Education, "2018–19 PARCC Results"

Conclusion

Students who enter a classical school should expect to be confronted by an academically rigorous curriculum that challenges them to read texts and histories that form the basis of American society—and that of Western civilization. Additionally, a classical curriculum challenges students to become avid seekers of knowledge, ready to challenge all arguments in the pursuit of truth. Classical educators deem this ability to think critically, pursue truth, and engage in civil debate as crucial to participation in a free society.

Of course, classical education may not be for every child. Other schools may offer more programs for students gifted in areas such as technology or math, for example. However, classical schools often do an excellent job of providing a curriculum that is adaptable and suitable to students of various backgrounds and interests. Complaints by educational theorists or commentators that the classical curriculum is too rigid and resistant to the realities of the present day are not borne out by the performance of the students in the schools profiled in this paper. Classical schools—private, parent-led, and public charter—are capable of transforming students from diverse backgrounds into scholars and citizens prepared for modern problems via a knowledge base rooted in timeless traditions.

Endnotes

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- ²⁶ ED, NCES, Nashville Classical.
- ²⁷ NCES, Education Demographics and Geographic Estimates, American Community Survey—Education Tabulation (ACS-ED), Metropolitan Nashville Public School District, TN.
- ²⁸ See South Bronx Classical Charter School.
- ²⁹ Ray Domanico, “NYC Student Achievement: What State and National Test Scores Reveal,” Manhattan Institute, March 2020.
- ³⁰ C. Thomas Holmes and Ronald L. Keffer, “A Computerized Method to Teach Latin and Greek Root Words: Effect on Verbal SAT Scores,” *Journal of Educational Research* 89, no. 1 (September–October, 1995): 47–50.
- ³¹ New York State Education Dept. (NYSED), “South Bronx Classical Charter School Enrollment (2017–18)”;
- idem, “NYC Geog Dist #7—Bronx Enrollment (2019–20).”
- ³² “Public School,” *Encyclopaedia Britannica*.
- ³³ The Partnership for Assessment of Readiness for College and Careers (PARCC) is a standardized assessment for K–12 in mathematics and English Language Arts. Assessments cover students in grades 3–11. Proficiency (labeled as scoring a 4 or 5, out of 5 on an exam) indicates that a student is on track for life after high school—prepared to enter college or begin a career.

Charter School Board Member Information Form

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

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

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

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

Background

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

2. Full name: Caleb Andrew Criscoe

Home Address: P.O. Box 118 Bennett, NC 27208

Telephone No.: (910)690-4313

E-mail address: calebcriscoe@hotmail.com

3. Brief educational and employment history.

BS – Management Information Systems, Liberty University

2018 – Present, Cofense, Sr. Information Security Program Manager

2016 – 2018, Ameritox, Sr. IT Security Engineer

2008 – 2016, FirstHealth of the Carolinas, Sr. Network Security Engineer

2004 – 2008, U.S. Air Force, 97th Communications Squadron, Network Infrastructure

Technician

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

No:

Yes:

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

Referred by a friend. Being a lifelong resident of the northern Moore area, I understand first hand the struggles that these communities face, especially around school options.

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

To assist with the foundational and operational guidance around Governance, Finance, Academics, and many other critical functions to ensure the success of the school.

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

I served on the board of deacons at Bennett Baptist Church from 2019 - 2022. I have also served in various leadership capacities during my almost 2 decades as a cybersecurity/IT professional.

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

I have an extensive background in the IT and cybersecurity space which will assist the board, and the school with making technology based decisions. During my career, I've also worked in the areas of IT governance and risk management where I've authored many corporate policies, procedures, and other business related documents.

School Mission and Program

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

The school believes that all children should have access to a classical education with a core focus on being a good citizen and a productive member of their community.

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

The school is planning to follow the Hillsdale classical instruction model.

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

When children, and their parents, are excited about the learning outcomes, and when the children are engaged in a safe learning environment.

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

Student and teacher retention and growth is always a positive sign of a successful school.

Governance

1. Describe the role that the board will play in the school's operation.
The board should assist the leadership of the school in many different facets, not to be limited to operations, governance, fundraising, and other critical areas of need.

2. How will you know if the school is successful at the end of the first year of operation?
Analyzing satisfaction scores from parents, staff, and students, as well as the overall academic reports.

3. How will you know at the end of five years of the schools is successful?
Much like the analysis after year one, satisfaction and academic reports are crucial. However, growth and retention of students and staff will also be a critical metric in the schools success.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
Ensuring funds are available to secure a location. Adequately plan for rapid growth of the school. Continually engage with parents and the community.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?
First, I would ensure any by-laws, policies, and procedures were followed for reporting/investigating such a matter. Professionalism during such events is vital to the trust and longevity of the board.

*Please include the following with your Information Form

- a one page resume

*If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action taken and the license validity. [Click or tap here to enter text.](#)

Certification

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



Signature

4-27-2023

Date

Charter School Board Member Information Form

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

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

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

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

Background

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

2. Full name: Dr. Sharon Castelli

Home Address: 220 Ridgeview Rd, Southern Pines, NC 28287

Business Name and Address: Uwharrie Charter Academy, 207 Eagle Lane, Asheboro, NC 27205

Telephone No.: (910) 986-2332

E-mail address: sharon_castelli@uwharriecharter.org

3. Brief educational and employment history.

Dr. Sharon Castelli has been the Superintendent of the School since October 2020. Prior to the School, she spent over 15 years in education as a Director, Literacy in Scotland County Schools, the Principal/Administrator in Montgomery County Public Schools, Assistant Principal in Moore County Schools, and a classroom teacher in Cumberland and Moore County Schools. Prior to working in education, Dr. Castelli spent almost 21 years in the United States Air Force, serving as a Master Sergeant and Chief, Airman and Family Readiness. Dr. Castelli received a Bachelor of Science in Elementary Education and Teaching from Charleston Southern University, a Master of Liberal Arts in Psychology from Harvard University, and a Doctorate of Education in Educational Leadership and Administration from Wingate University. Dr. Castelli received her Superintendent Licensure in 2017. She also holds a license in Elementary Education and Exceptional Children, add-on license in Administration from UNC Chapel-Hill, and an Associates Degree in Social Services.

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

No: Yes:

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

Referred by a friend and Yes, I plan to serve.

6. What is your understanding of the appropriate role of a public charter school board member?
To assist with Governance, Financial, and Academic supports; however, we are voting members and all hiring (except Head Master) is done by the school.

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

Currently, Superintendent of Uwharrie Charter Academy

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

I can assist with my background in a Charter School with questions/compliance/fiance/academics/reports

School Mission and Program

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

The school believes in lifelong learning through classical instruction with strong foundational beliefs in being a good citizen.

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

The school is planning to follow the Hillsdale classical instruction; however, they will also be following the NC Standards Course of Student. Additionally, the school will follow the NC graduation plan and administer all required state assessments.

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

When children are focused, happy, engaged in learning, and safe. The data will follow when teachers and students are supported.

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

Again, when you see student growth data, when you see teachers and students are in engaged in learning through assessments and observations.

Governance

1. Describe the role that the board will play in the school's operation.
The daily ins and outs of the school will be in the hands of the headmaster; however, weekly reports on upcoming events, items accomplished, and board meeting, will allow the board to assist and review policies and procedures as a governing body.
2. How will you know if the school is successful at the end of the first year of operation?
When compliance measures have been completed on time, when all financial responsibilities have been met, and when students are engaged in learning.
3. How will you know at the end of five years of the schools is successful?
Data shows student growth, a waitlist continues to grow, compliance measures are met, and feedback from all stakeholders show a positive outcome.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
Supporting administration through a unified voice and allowing the headmaster to complete their mission in assisting teachers, students, and families.
5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?
This will be a time to reach out to our board chair and report my concerns to our legal council as this may be outside of our scope. It will be necessary to set our boundaries and expectations within our handbook and our bylaws to make any decisions easier for the board so the school does not suffer.

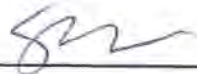
*Please include the following with your Information Form

- a one page resume

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

Certification

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



4/23/23

Signature

Date

Charter School Board Member Information Form

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

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

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

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

Background

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

2. Full name: Deborah G Lawson

Home Address: 205 Pine Needles Lane, Southern Pines, NC 28387

Business Name and Address:

Telephone No.: (910) 215-4099

E-mail address: deborahlawson.sp@gmail.com

3. Brief educational and employment history. BA in Journalism, St. Michael's College, Winooski, VT
12 years employed by St. John Paul II Catholic School
Southern Pines, NC

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

No: Yes:

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

Strong interest in Classical Curriculum and visited a local meeting for non-public school options and School Choice.

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

To be a part of the development of a mission guided school, and to help direct the school's mission and goals with my experience as a non-profit board member, and past employment in a starter non-public school.

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

12 years as Director in Institutional Advancement, Marketing, Admissions, and Enrollment Director for a k-8 school. Conducted Capital Campaigns raising over \$6Million.

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

Familiar with demographics of Moore County, enrollment and admission systems, academic records and business operations of schools.

School Mission and Program

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

The mission is guided by the need for return to classical education and inquiry-based learning which will allow students to explore liberal arts in a way that aids in cultivation of good citizenship and moral character.

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

Academics that promote moral and civic duties, utilizing classical curriculum that promotes the 4 disciplines of education in a way that emphasized virtuous behavior.

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

Well rounded, successful, and active student body. Active community and parental participation

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

Partnerships with community members, parents, faculty are cohesive enough to allow for growth in enrollment and academic success.

Governance

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

The role of the BOD should be to help and guide the school's leadership and support the leadership in operations, mission, and fundraising goals.

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

Tracking satisfaction of Staff, Students, and Parents through surveys and academic records.

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

First by monitoring growth and enrollment. Secondly, by tracking data from students and parents both regarding satisfaction and academic records.

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

Securing funds for a location and preparing for rapid growth based on community need for school options.

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

First, approach the BOD, or the member with my concern. Document and eventually bring a motion to discuss and handle the issue to the Board regarding the issue.

*Please include the following with your Information Form

- a **one page** resume

*If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action taken and the license validity. [Click or tap here to enter text.](#)

Certification

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

Signature
Date

4-18-23

Charter School Board Member Information Form

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

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

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

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

Background

1. Name of charter school on whose Board of Directors you intend to serve:
HIGHLANDS CHARTER ACACEMY
2. Full name: KAREN MCKELLAR MANNING
Home Address: 14 PRINCESS GATE DR, WHISPERING PINES, NC 28327
Telephone No.: 910.850.4295
E-mail address: manningkm@gmail.com
3. Brief educational and employment history.
Appalachian State University: BSBA Marketing & BS Commercial Arts
Sandhills Community College Director of Marketing 2006-Present
Other ad agencies and printing companies 1982-2006
4. Have you previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation?
No: Yes:
5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?

Caroline Kelly and I began this project together.

I am concerned about the overcrowding of the public schools in Moore County and the low performance of the students, especially in the central and northern sections of the county. I am afraid our schools have gotten away from "the basics" and am a huge fan of classical

education methods. I see beginning this school as a way to give back to the county I have lived in for most of my life.

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

I see the Board as responsible for developing the charter and policies and procedures for the school, for hiring capable and professional staff, for the financial stability of the school, to make sure the school adheres to all statutory and regulatory requirements, and to make sure the educational programs are successful such that the school is in good academic standing.

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

Many years ago, I served on the Board of Village Christian Academy in Fayetteville. I have served on many committees and worked on several large projects and special events at Sandhills Community College. I have leadership skills and experience.

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

Marketing, leadership, team participation, and working in an education environment for 17 years.

School Mission and Program

1. What is your understanding of mission and guiding beliefs?

The school will educate students by using a traditional American classical curriculum and it will emphasize virtues and civic responsibility. The curriculum will be challenging, and the culture will be one of respect, honor, and decorum.

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

A teacher-led traditional classical education method that will include the reading and discussion of great works of literature, an understanding of the founding documents and principles of America, low technology, traditional mathematics instruction and phonics. Students will be taught to be self-disciplined, and will possess strong moral character and civic responsibility.

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

- Well-mannered respectful students that are enthusiastic about learning. I often think of the statement that the best education is "lighting a fire, not filling a bucket." When

students enjoy learning, are excited about learning, and want to come to school each day, you know the school is thriving.

- Another saying I am reminded of is, "If you love your career, you never feel like you are working a day in your life." A successful school will be like that for its students. They will enjoy coming to school, presenting their work, bringing a smile to their teachers' faces, and positively interacting with fellow students.
- And the students know they are valued not for what they know but for who they are, a human being worthy of love, respect, and honor.

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

I think the school's distinct atmosphere will be evident as one walks the halls or enters the classrooms. There will be order, kindness, and consideration. Yes, grades are important, and they will be notable, but if the students graduate deficient in character, they will not be well-equipped for a career or higher education nor service to their families, community, or country.

Governance

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

This Founding Board will take on the tasks necessary to begin the school, form committees, hire the Headmaster, raise money, find a facility, and generate excitement in the community for the school by making presentations, effective marketing, and talking to others.

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

Parents will reenroll their children in the school the following year and there will be a waiting list.

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

Again, parents will reenroll their children in the school each subsequent year, and there will be a waiting list. The school will have a strong sense of community and pride among the administration, teachers, parents/guardians, and community. Of course, the students will score high on the EOG tests, but better than that, they will have a love of learning, have integrity, and treat their fellow students, teachers, and even themselves with respect and honor.

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

The hiring of the Headmaster is probably the most critical factor to beginning a successful school. This person will be responsible for securing teachers that support the

school's mission, values, and virtues. The Headmaster will ensure the culture desired for the school is accomplished, and the first year may be the most important for doing such.

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

HCA By-laws, policies and procedures must always be followed. Evidence must be gathered to support my concerns and presented in a factual, professional manner. If others have privately expressed similar concerns, I would not tolerate slander or gossip. They can support the case with their evidence or perspective. Detailed documentation must be kept. Confidentiality is of utmost importance. If legal counsel or regulatory authorities are needed, they must be consulted. Those suspected of unethical or unproductive actions should be given the opportunity to defend their actions.

*Please include the following with your Information Form

- a one page resume

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

Certification

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



April 24, 2023

Signature

Date

Charter School Board Member Information Form

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

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

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

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

Background

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

2. Full name: Rebecca Gaines Graham

Home Address: 13 Lassiter Ln Pinehurst NS 28374

Business Name and Address: NA

Telephone No.: 336-963-7239

E-mail address: beckygraham237@gmail.com

3. Brief educational and employment history. BS Math Appalachian ST Univ 1975
2007-2023 Sandhills Community College–GED Instructor/Data Manager Analyst
1975-2006 Industrial Engineer and Technical Trainer with several companies

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

No: Yes:

5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school? Chance conversation with a board member. I wish to serve on the Founding Board.

6. What is your understanding of the appropriate role of a public charter school board member?
A Board Member will provide guidance to the administration of the Charter School. A Founding Board Member will help with the application and all requirements to make the school a reality.
7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member. I served on the Chester County School Board (Chester, SC) from 1990-98 (approx dates)
8. Describe the specific knowledge and experience that you would bring to the board. I have prior school board experience. My math background and experience enables me to understand data.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs? Highlands Charter Academy believes that children can learn and use their educational experiences to become productive citizens.
2. What is your understanding of the school's proposed educational program? Highlands Charter Academy will use a classical educational program.
3. What do you believe to be the characteristics of a successful school? A successful school will produce students that are eager and open to learning.
4. How will you know that the school is succeeding (or not) in its mission? The progression of students from grade to grade will be an indication of the school's success.

Governance

1. Describe the role that the board will play in the school's operation. The board will provide oversight to the policies, procedures and budget of the school.
2. How will you know if the school is successful at the end of the first year of operation? Measures of success: (1)the budget will be met, (2)faculty, staff and student concerns

will be addressed in a timely manner, and (3) the application pool for the lottery (K) will be greater than the original pool.

3. How will you know at the end of five years if the school is successful? The School Report Grade will be a C or better. Enrollment is at near capacity. Complaints from faculty/staff are minimal.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful? Continued marketing, constant analysis of school data
5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school? I think it should be addressed by the entire board. Not necessarily calling someone out, others may be unsure of protocol. Start with reviewing the role of the board, give examples of appropriate and inappropriate situations.

*Please include the following with your Information Form

- a one page resume

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

Certification

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



Signature

4/13/23

Date

Charter School Board Member Information Form

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

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

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Background

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

2. Full name: Dr. BethAnn Pratte

Home Address: 360 Grove Road Southern Pines NC 28387

Business Name and Address: NA

Telephone No.: (717)870-2557

E-mail address: bethannpratte@gmail.com

Brief educational and employment history.

Dr. BethAnn Pratte serves as a special education advocate and dyslexia interventionist. She spent 20 years in public education as a classroom teacher in addition to many other roles and responsibilities, including curriculum writer/coordinator; designer of character education curriculum/program; per diem principal and administrator; science department chair (middle-level); and part of the core leadership team and professional development team. She has over a decade of experience teaching at the college level. She taught at the graduate level at Penn State University York Campus, and York College. She retired from public education in Pennsylvania and relocated to North Carolina in 2018. She continues her advocacy work and dyslexia interventions. Dr. completed her Bachelor of Science in Elementary Education at Millersville University; a Master's in Curriculum and Teaching from Penn State University; an Educational Leadership Certificate Program at Western Maryland College; and a Doctorate Degree in Educational Administration at Immaculata University. She received her Dyslexia Practitioner Certificate (Wilson Language) from the AIMS Academy. She also was a certified trainer in The 7 Habits of Highly Effective People. She holds a North Carolina Superintendent,

Curriculum Instructional Specialist, Principal, and Exceptional Children Program Administrator license.

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

No: Yes:

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

Referred by a friend and Yes, I plan to serve. The northern end of the county needs school choice and the option of classical education.

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

To assist with Governance, Financial, and Academic support; however, we are voting members and all hiring (except Head Master) is done by the school.

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

Experience in educational leadership in the public sector, educational background.

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

I can assist with my background in the professional development of best teaching practices; the science of reading; and teaching the exceptional child. I also have much experience with Individualized Educational Plans and the laws surrounding special education.

School Mission and Program

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

The school's mission and guiding beliefs were constructed by a collaborative effort with all founding board members. Highlands Charter Academy will cultivate lifelong intellectual curiosity in its students through a traditional, content-rich classical education that emphasizes virtuous living, moral character, and civic responsibility, equipping students to live well-ordered lives.

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

Highlands Charter Academy's proposed educational program was developed through a collaborative effort of the founding board. Instruction at Highland Charter Academy will be delivered using a variety of instructional methods determined by the course content, learning objectives, and student need. Instructional design will include differentiation

according to content, process, and product to meet the needs of the entire student population.

3. What do you believe to be the characteristics of a successful school?
A successful school has high student achievement, effective leadership, quality staff, meaningful and engaging instruction, orderly systems and procedures, and is safe and secure.
4. How will you know that the school is succeeding (or not) in its mission?
The Board of Highlands Charter Academy will be actively involved in assessing how well the school achieves its mission. It will meet once a month and receive updates on the school's performance from the Headmaster. As part of the planning year process, the Board will work closely with the Headmaster to ensure the school's alignment toward achieving the adopted goals. This process will entail the development of a Strategic Plan for approval by the Board that provides specific action to achieve each performance goal.

Governance

1. Describe the role that the board will play in the school's operation.
The role that the board will play is one of governance. The school board will create and uphold board policies, hire a Headmaster, and develop and implement the overall educational vision of the school.
2. How will you know if the school is successful at the end of the first year of operation?
The board will know if the school is successful at the end of the first year of operations by reviewing data and comparing it to HCA goals.
3. How will you know at the end of five years if the school is successful?
The Board of Highlands Charter Academy will be actively involved in assessing how well the school achieves meeting the SMART goals. It will meet once a month and receive updates on the school's performance from the Headmaster. As part of the planning year process, the Board will work closely with the Headmaster to ensure the school's alignment toward achieving the adopted goals. This process will entail the development of a Strategic Plan for approval by the Board that provides specific action to achieve each performance goal. Surveys and other quantitative and/or qualitative data will be collected to determine if SMART goals are met related to student achievement, effective leadership, quality staff, meaningful and engaging instruction, orderly systems and procedures, and is safe and secure.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

The Board of Highlands Charter Academy is intentional about hiring exemplary staff and will develop systems and procedures to ensure the school operates efficiently and will make progress toward its goals.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?
If I believe one or more board members were acting unethically, I would first seek to understand the situation. If evidence shows they were acting unethically, I would address it at the next board meeting to allow the board to determine how to handle the situation from a legal and organizational standpoint. If I disagree with a board member(s) and believe their actions are not good for the school, I will listen to their ideas and reasons and share my thoughts and rationale. If common ground is not found, the discussion should be moved to the board at large.

*Please include the following with your Information Form

- a one page resume

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

Certification

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

BethAnn Pratte April 21, 2023

Signature

Date

Dr. BethAnn Pratte

Charter School Board Member Information Form

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

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

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

Background

1. Name of charter school on whose Board of Directors you intend to serve: Highlands Charter Academy
2. Full name: Caroline Anne Frances Switzer Kelly
Home Address: 3313 Kelly Plantation Road, Carthage, NC 28327
Business Name and Address: retired
Telephone No.: 704.779.0161
E-mail address: cfskelly@gmail.com
3. Brief educational and employment history.
 - BA, MA, M.Div. - Edinburgh University, Edinburgh, Scotland
 - 35 years teaching - MS, HS, Community College - Latin, French, History, Bible
 - Miscellaneous education/WL related: consultant, editor, writer, curriculum specialist, member of several NCDPI and NCVPS projects.
 - NPR member stations in MS and NC - classical music program announcer
4. Have you previously served on a board of a school district, another charter school, a non-public school, or any not-for-profit corporation?
Yes
5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?
A friend who knew I was interested in education shared with me her vision for a charter school in Moore County. Knowing that there was not a K12 charter school in the county I was immediately interested. Students and parents need choice and the only choices in our county are traditional public, private/Christian, or homeschooling. The last two are not an option for families with limited income or with only one parent.
6. What is your understanding of the appropriate role of a public charter school board member?
It is a position of service to the community. It involves commitment to the mission and to a good deal of work to make the project happen and continue.

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

I have served for 10 years on the Board of Covenant Day School, Matthews, NC - the school where I taught for the previous 18 years. I know that school very well and it has been a privilege to continue in a governance role, serving with accomplished leaders who were role models to me in managing the school's affairs well. In addition to that Board, I have served as the president of a regional and a state World Language organization, in addition to service on numerous other committees, mostly connected to education.

8. Describe the specific knowledge and experience that you would bring to the board.
 - 30 years of experience in education
 - 5 years in an inner-city school in Jackson, MS, with a principal who enabled his teachers to succeed in the classroom by ensuring good PD, good personal support, and mentoring, and the encouraged me to set high standards for my students - which they reached.
 - recognition with a national award and a North Carolina award for teaching and service to the WL profession
 - Many years of service on well-run, responsible committees connected to education, serving as president/chair for several of them.

School Mission and Program

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

We will provide a solid, content-rich education in an environment that provides support for children and their families to develop character, the practice of hard work, service of others and self-control.
2. What is your understanding of the school's proposed educational program?

We want to offer a rigorous, traditional curriculum that emphasizes reading and which provides an age-appropriate introduction to the 'Great Books' of civilization as well as solid training in the STEM arena. Our goal is to equip students in every area to be as successful as they can be.
3. What do you believe to be the characteristics of a successful school?

A successful school is dependent on the quality of its teachers who need to be committed to the overall mission, who genuinely care for each student in their classes, and who know that they are supported by the administration.
4. How will you know that the school is succeeding (or not) in its mission?

The best evidence for the success of a school is year over year retention of students and staff. High EOG scores will also be an indicator of quality education. We will also want to see a good representation of Hispanic students in the school because of the location in the county, and we will want to see that they are demonstrating academic success.

Governance

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

The Board sets policy and oversees the running of an institution. We work closely with the school administration who take care of day-to-day events, and who report to the Board.

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

We are starting with K-2 in order to build a strong foundation in reading and numeracy and to set the school climate and philosophy in place with a smaller group of students. We will be looking for success particularly with reading, as well as for unity and enthusiasm on the part of the faculty and administration. We will also be looking for a strong applicant pool for the next year's kindergarten, in addition to the seats for first and second grades.

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

By the end of five years, we will have had three levels take EOGs. We want to see them at the very least meet the 70% math proficiency and the 71% reading proficiency currently found in other charter schools in our county. We also want to see strong demand in the county which will let us know that parents are buying into and are excited by what we are trying to provide for them and for their families.

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

- i. Hire excellent head of school, faculty, and staff, including aides, ELL, EE, and other 'specials' teachers who are committed to the mission.
- ii. Ensure that teachers receive support necessary for success, including focused PD, and encouragement towards certification
- iii. Ensure that the Board gets the training needed - so that we offer knowledgeable oversight but do not restrict the initiative of the principal and school leadership.
- iv. Propose a responsible budget and ensure that it is followed.
- v. Work well and responsibly with the NC OCS, attending all required training.
- vi. Stay in touch with the community, listen carefully to their feedback, and be award of their needs.

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

I would check to be sure that any allegations are truthful and not malicious gossip. Then, as Board Chair, I would approach the individual(s) to ask for an explanation, bringing the Vice-Chair with me. If necessary, I would be prepared to ask the individual(s) to resign.

Certification

I, Caroline Switzer Kelly certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Highlands Charter Academy is true and correct in every respect.

Signature



Date

April 25, 2023

Charter School Board Member Information Form

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

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

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

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

Background

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

2. Full name: Ariane Joy Mestelle

Home Address: 305 Oakhurst Vista, West End, NC 27376

Telephone No.: 832.360.5482

E-mail address: mestellenc@gmail.com

3. Brief educational and employment history.

I am a graduate of Hillsdale College. I am also a graduate of the Dana Corporation Financial Management Training program. I have worked extensively in the field of Finance in many different roles. I have had numerous positions in Analytics, Marketing and Sales in the medical and oil/gas industry. Please see resume for further information.

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

No: Yes

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

As a Hillsdale College graduate, I expressed interest and offered to help. It was determined by the existing board members that they could use my expertise on the board.

6. What is your understanding of the appropriate role of a public charter school board member?
To assist with Governance, Financial, and Academic support; however, we are voting members and all hiring (except Head Master) is done by the school.
7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.
In the corporate setting, I served on multiple high level leadership teams both globally and in the U.S. and together we solved multi-tiered issue and came up with plans to apply solutions. I was also actively involved in oversight throughout the project. I work well in teams and have been put in multiple leadership positions over my career.
8. Describe the specific knowledge and experience that you would bring to the board.
Finance, Marketing and Fundraising in the community.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
HCA will use a content rich classical education for students to understand the world and their place in it and to cultivate virtuous habits of thought and action.
2. What is your understanding of the school's proposed educational program?
The school is planning on following the Hillsdale classical instruction; however, this school will also follow all NC guidelines for assessments and graduation.
3. What do you believe to be the characteristics of a successful school?
Retention of student population, parent involvement, waiting list for entry, testing scores exceed state standards, and quality teacher recruitment and retention.
4. How will you know that the school is succeeding (or not) in its mission?
When students are engaged in learning, have consistent attendance, and we see a high retention of students year to year. These will all be indicators of success as well as those I mentioned in question 3 above.

Governance

1. Describe the role that the board will play in the school's operation.
The Headmaster will handle the daily tasks of the school; however, weekly reports on upcoming events, items accomplished, and board meeting, will allow the board to assist and review policies and procedures as a governing body
2. How will you know if the school is successful at the end of the first year of operation?
Financial and compliance measures are met. Students and teachers are engaged, and student population is at capacity with a waiting list.

3. How will you know at the end of five years of the schools is successful?
Student growth, waitlist grows, financial and compliance measures have been met
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
Supporting the school and the headmaster with a unified voice and being diligent about the path we set out for success.
5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?
I would take it to the Board Chairman and Legal if necessary for guidance on if it should be brought in front of the entire board entity.

*Please include the following with your Information Form

- a one page resume

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

Certification

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

Signature
Date

Ariane Mestelle
April 25, 2023



Charter School Required Signature Certification

Note: Outlined below is a list of areas that must be certified by the proposed Board of Directors. Any forms Not Applicable to the proposed charter school indicate below with N/A and provide a brief explanation for providing such response.

Serving on a public charter school board is a position of public trust and board members of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, the school's fulfillment of its public obligations, all terms of its charter, and understanding/overseeing all third-party contracts with individuals or companies.

- ❖ The selected Board Attorney that he/she has reviewed with the full Board of Directors, listed within the application, all the governance documents and liabilities associated with being on the Board of a Non-Profit Corporation.

- Name of the Selected Board Attorney:

Stephen C Later

- Date of Review: 4/18/23

- Signature of Board Members Present (Add Signature Lines as Needed):

- Cald L. [Signature]
- Karen Manning
- Beth Ann Pratte
- Rebecca Graham
- Deborah S. Lawson
- Alyson Nestelle
- [Signature]
- ISA

- ❖ If contracting with a CMO/EMO, that the selected management company has reviewed with the full Board of Directors, listed within the application, all the items required and the associated management contract and operations.

- Name of the Contact for Selected EMO/CMO:
- Date of Review:
- Signature of Board Members Present (Add Signature Lines as Needed):

N/A at this time

- ❖ If contracting with a financial management service provider that the selected financial service provider has reviewed with the full Board of Directors, listed within the application, all the financial processes and services provided.

- Name of the Contact:
- Name of the Selected Financial Service Provider:
- Date of Review:
- Signature of Board Members Present (Add Signature Lines as Needed):

N/A at this stage of planning.

- ❖ If the proposed Board of Directors, listed within the application, is contracting with a service provider to operate PowerSchool that the service provider has reviewed all of the financial processes and services provided.

- Name of the Contact:
- Name of the Selected PowerSchool Service Provider:
- Date of Review:
- Signature of Board Members Present (Add Signature Lines as Needed):

N/A at this stage of planning.

Certification

I, Caroline Kelly, as Board Chair, certify that each Board Member has reviewed and participated in the selection of the individuals and vendors attached to this document as evidenced by the full Board of Director signatures outlined above. The information I am providing to the North Carolina State Board of Education as Highlands Charter Academy Charter School is true and correct in every respect.



Signature _____

Date 4/18/23

OSEP Research Institutes: Bridging Research and Practice



In this column, *Bridging Research and Practice*, three of the federally funded special education research institutes report to you, the practitioner, on their progress in areas that will be particularly helpful to you in working with your students. The U.S. Office of Special Education Programs (OSEP) has funded these three research institutes to study specific curricular and instructional interventions that will accelerate the learning of students with disabilities in curricular areas:

Center on Accelerating Student Learning (CASL) focuses on accelerating reading, math, and writing development in Grades K-3. The Directors of CASL are Lynn Fuchs and Doug Fuchs of Vanderbilt University.

Principal Investigators include Joanna Williams at Columbia University and Steve Graham and Karen Harris at Vanderbilt University.

Research Institute to Accelerate Content Learning Through High Support for Students With Disabilities in Grades 4-8 (REACH) is examining interventions that reflect high expectations, content, and support for students. The Director of REACH is Catherine Cobb Morocco at Education Development Center in Newton, MA. Research partners include the University of Michigan (Annemarie Palincsar and Shirley Magnusson), the University of Delaware (Ralph Ferretti, Charles MacArthur, and

Cynthia Okolo), and the University of Puget Sound (John Woodward).

The Institute for Academic Access (IAA) is conducting research to develop instructional methods and materials to provide students with authentic access to the high school general curriculum. The Institute Directors are Don Deshler and Jean Schumaker of the University of Kansas, Lawrence. Research partners include the University of Oregon and school districts in Kansas, California, Washington, and Oregon.

This issue features the CASL.

Responsiveness-To-Intervention: A Blueprint for Practitioners, Policymakers, and Parents

Douglas Fuchs and Lynn S. Fuchs

The Center on Accelerating Student Learning's (CASL's) general goal is to identify instructional practices that accelerate the learning of K-3 children with disabilities. A specific goal is to identify and understand the nature of nonresponsiveness to generally effective instruction. This column addresses identifying nonresponders—work supported by Office of Special Education Program's National Research Center on Learning Disabilities, but which had its origins in the CASL research program.

Individuals With Disabilities Education Improvement Act of 2004 (IDEA; P.L. 108-446) permits educators to use responsiveness-to-intervention (RTI) as a substitute for, or supplement to, IQ-achievement discrepancy to identify students with learning disabilities (LD). Policymakers have high hopes that RTI (a) will encourage and guide practitioners to intervene earlier on behalf of a greater number of children at risk for school failure, and (b) will represent a more valid method of LD identification because early

intervention will decrease the number of "false positives," or students given a disability label who are low achievers because of poor instruction rather than an inherent disability. Partly because IDEA was reauthorized so recently, there is confusion about just what it is, and how schools, districts, and states might implement it. Following, we define RTI by specifying a 4-step process, and we distinguish between what we believe are "acceptable practices" from more desirable "best practices." We then illustrate how the process might work by presenting a series of four "case studies." We conclude by making explicit several of our preferences. We wish to emphasize that the following blueprint is but one way to define RTI.

Blueprint

Step 1: Screening (Responsibility: General Education)

In the first month of the school year, students are screened to identify those "at risk" for school failure.

Acceptable Practices. To identify at-risk students: (1) the previous year's state assessment scores are reviewed to identify any student scoring below the 25th percentile in reading or math; OR (2) an achievement test is administered to all children in a given grade, with at-risk children designated as those scoring below the 25th percentile. (NOTE: At-risk students can also be identified by teachers or parents.)

Best Practices. To identify at-risk students (1) everyone is assessed using brief screening tools that demonstrate diagnostic utility for predicting performance on the reading and math state assessments (in the elementary grades) or on the local graduation requirements (at the secondary level); OR (2) only those students who perform below the 25th percentile on the previous year's state assessment, or who perform below the 25th percentile on a more current achievement test, are screened individually with tools that have diagnostic usefulness.

Step 2a: Implementing Classroom Instruction (Tier 1; Responsibility: General Education)

Students receive instruction in general education, in conjunction with No Child Left Behind and the Adequate Yearly Progress provision.

Acceptable Practice. School districts implement classroom instruction that reflects sound instructional design principles.

Best Practice. School districts choose evidence-based curricula and instruction, and provide teachers with relevant and rigorous professional development. Teachers implement the curricula and instruction, and their fidelity of implementation is documented.

Step 2b: Monitoring Responsiveness to Classroom Instruction (Tier 1; Responsibility: General Education).

At-risk students are monitored for 8 weeks to identify a subset that responds inadequately to general education.

Acceptable Practice. At the end of 8 weeks, at-risk students are administered a screening tool or brief standardized achievement test in the area of risk (e.g., reading or math). Adequate Tier 1 response is operationalized by a score above the 16th percentile.

Best Practice. At-risk students are assessed every week for 8 weeks in the area of risk using brief monitoring tools. Adequate Tier 1 response is operationalized using (a) local or national normative estimates for weekly improvement OR (b) criterion-referenced figures for weekly improvement. If (a) and (b) are unavailable, then adequate Tier 1 response is defined as "some improvement" (i.e., a slope greater than the standard error of estimate).

Step 3a: Implementing a Supplementary, Diagnostic Instructional Trial (Tier 2; Responsibility: General and Special Education)

Tier 1 nonresponders receive an 8-week supplementary, diagnostic instructional trial. This trial is explained to parents in a letter or face-to-face meeting. Written parental consent is required for the trial to proceed.

Acceptable practice. The special educator and colleagues (e.g., school psychologist, speech/language clinician) collaboratively problem-solve to design a supplementary, diagnostic instructional trial tailored to the needs of the student. This instruction may be implemented by the classroom teacher, but would more likely be conducted by a specialist or an aide under the supervision of the teacher or a specialist.

Best Practice. The Tier 1 nonresponder participates in small-group instruction with no more than 2 additional students who share similar instructional strengths and weaknesses. The group is taught at least 3 times per week, 30 minutes per session, by a certified teacher or aide who can accurately implement a scientifically validated, standard tutoring protocol.

Step 3b: Monitoring Responsiveness to a Supplementary, Diagnostic Instructional Trial (Tier 2; Responsibility: General Education and Special Education)

Response to the 8-week Tier 2 supplementary, diagnostic trial is monitored to identify the subset of students who respond inadequately (i.e., Tier 2 nonresponders). Parental feedback is provided in a written report, a telephone call, or a face-to-face meeting.

Acceptable Practice. At the end of 8 weeks, at-risk students are administered a screening tool or brief standardized achievement test in the area of risk. Adequate Tier 2 response is specified in terms of a score above the 16th percentile.

Best Practice. At-risk students are assessed every week for 8 weeks in the area of risk using brief monitoring tools. Adequate Tier 2 response is determined using (a) local or national normative estimates for weekly improvement OR (b) criterion-referenced figures for weekly improvement. If (a) and (b) are unavailable, then adequate Tier 1 response can be operationalized as "some improvement" (i.e., a slope greater than the standard error of estimate).

Step 4: Designation of LD, and Special Education Placement (Responsibility: General and Special Education)

The Tier 2 nonresponders receive an individualized, comprehensive evaluation that addresses all eligibility determination, evaluation, and procedural safeguards specified in IDEA. Written parental consent is obtained. The evaluation team (including the special education teacher and other qualified professionals) designs an evaluation that rules out mental retardation as an alternative diagnosis using a brief intellectual assessment and eliminates other diagnostic possibilities such as emotional disturbance or visual disabilities.

Case Studies

Graceland Elementary

To illustrate different decisions within an RTI framework, we present four case studies from first grade in (fictitious) Graceland Elementary. First, we briefly describe the progress monitoring measure used by Graceland's teachers, as well as the nature of the school's Tier 1 and Tier 2 instruction.

Measure. For screening and designating responsiveness to instruction at Tiers 1 and 2, Graceland's first-grade teachers use curriculum-based measurement word identification fluency (CBM-WIF). With CBM-WIF, students read a list of words for 1 minute. Performance is the number of words read correctly. Each alternate form randomly samples 50 words from a pool of 100 high-frequency preprimer, primer, and first-grade words. Two decades of research has demonstrated the concurrent and predictive validity of CBM-WIF level and slope (i.e., weekly improvement based on a least-squares regression between calendar days and scores).

For screening, Graceland Elementary assesses all first-grade students in September on two alternate forms of CBM-WIF, averaging each child's performance across the two forms. Graceland teachers use a CBM-WIF cut-score of 15 to designate risk for reading failure by year's end (i.e., any student scoring lower than 15 on CBM-WIF is judged likely to experience serious reading difficulty unless the

student receives intervention). For monitoring at-risk first-graders' responsiveness to instruction at Tier 1, the teachers measure students once each week on a different form of CBM-WIF; to measure responsiveness in Tier 2 instruction, twice each week. At Tiers 1 and 2, performance is graphed, and slopes are calculated at key decision points. Based on a normative framework for at-risk students who respond positively to instruction, Graceland School uses a CBM-WIF slope of at least 1 word increase per week to designate positive response to intervention.

Tier 1 and Tier 2 Instruction. First-grade Tier 1 instruction at Graceland can be described as "generally effective" because (a) every teacher uses a validated reading curriculum, Open Court; (b) Graceland's lead reading teacher observes each teacher's implementation of Open Court quarterly and has documented that the program is implemented with fidelity; and (c) during the previous year, only 3 of 60 (i.e., 5%) first graders failed to achieve the end-of-year CBM-WIF benchmark of 60 words read correctly in 1 minute.

Graceland's Tier 2 instruction is modeled after a research-backed, first-grade tutoring protocol. Students receive 45 minutes of instruction four times each week in groups of 1-3 students. Tutors are paraprofessionals who have completed formal training and are observed once each week by the reading teacher, who provides corrective feedback. Once each week, the reading teacher also meets with the tutors to examine students' CBM-WIF graphs and to problem solve about students whose progress is inadequate.

Case A: Aretha Is Not At Risk (Not LD)

On the September CBM-WIF screening, Aretha's average score across the two alternate forms was 22.5. This score exceeded the cut-point for designating reading-failure risk (i.e., 15). So, Aretha was deemed not at risk (see the "Case A" graph and decision tree).

Case B: Gladys Is Initially At Risk, But Proves Responsive to Tier 1 Instruction (Not LD)

On the September CBM-WIF screening, Gladys's average score across the two alternate forms was 10.5. This score fell

below the cut-point for designating risk for reading failure. She was viewed as at risk and her performance was monitored each week for 8 weeks during Tier 1 instruction. The data indicated that her CBM-WIF slope (i.e., weekly increase) was 1.8, which exceeded the minimum 1.0 criterion for positive response. So, she was deemed responsive to Tier 1 instruction. (See her graphed performance and accompanying decision tree in the "Case B" figure.)

Case C: Tina Is At Risk and Unresponsive to Tier 1 Instruction, But Responsive to Instruction at Tier 2 (Not LD)

On the September CBM-WIF screening, Tina's average score across the two alternate forms was 5.5. Because this score fell below the at-risk cut-point, her performance was monitored each week for 8 weeks in Tier 1 instruction. The data indicated that her CBM-WIF slope (i.e., weekly increase) was 0.4, which fell below the minimum 1.0 criterion for an acceptable response. So, Tina was judged unresponsive at Tier 1 and, after written parental consent was obtained, entered a Tier 2, 8-week trial, again with weekly monitoring. At Tier 2, Tina's slope increased to 1.7, exceeding the 1.0 criterion, and she was seen as *not* requiring special education. (Her graph and decision tree are shown in the "Case C" figure.)

Case D: Etta Is At Risk and Unresponsive to Both Tier 1 and Tier 2

On the September CBM-WIF screening, Etta's average score across the two alternate forms was 5.5, which fell below the cut-point designating risk. So, she was monitored each week for 8 weeks during Tier 1 instruction. During this period, her CBM-WIF slope (i.e., weekly increase) was 0.2, which fell below the 1.0 criterion. She was judged unresponsive to Tier 1 instruction and, with parents' written approval, entered Tier 2. Because her slope during Tier 2 instruction was 0.5, well below the 1.0 criterion, she was also deemed unresponsive to Tier 2 instruction. This triggered a referral for a comprehensive evaluation, which represents Step 4 in our process. Written parental consent was obtained. The 2-subtest Wechsler Abbreviated Scale of Intelligence ruled out mental retardation,

and rating scales and a teacher report eliminated the possibility of an emotional/ behavioral disorder. After an appropriate review of all evidence, Etta was classified as LD. (Her graph and decision tree are shown in the "Case D" figure.)

Preferences

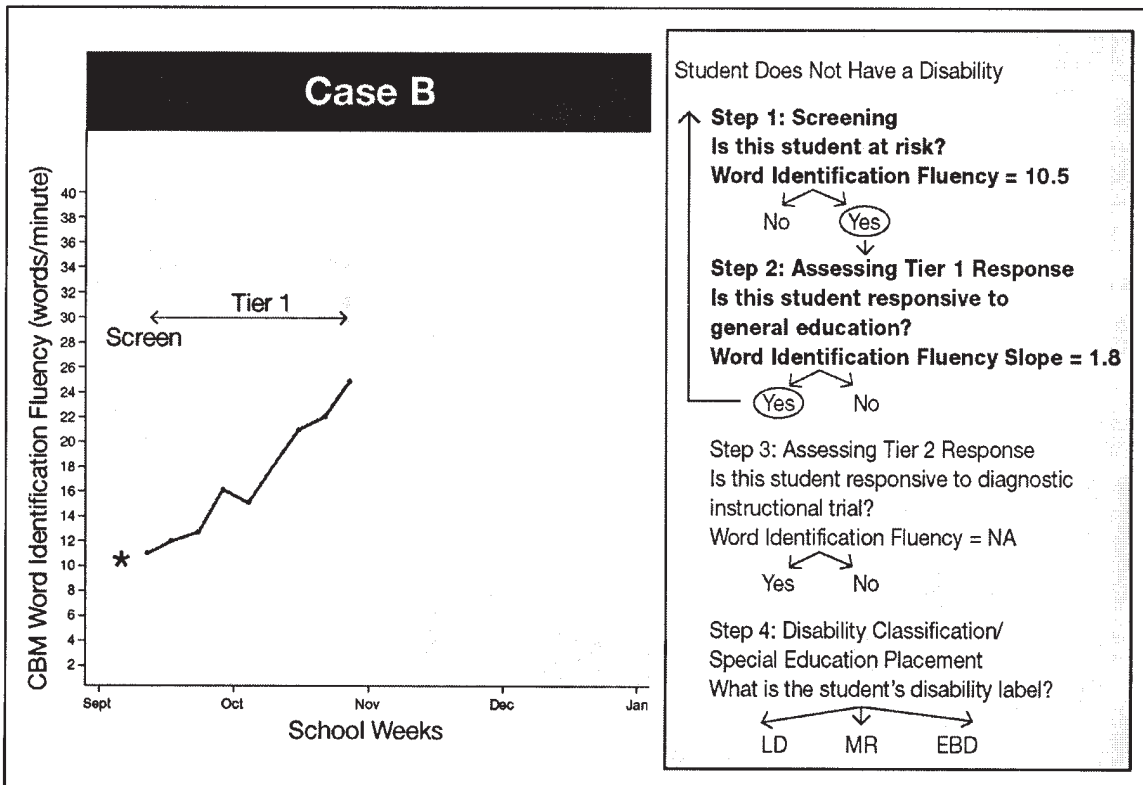
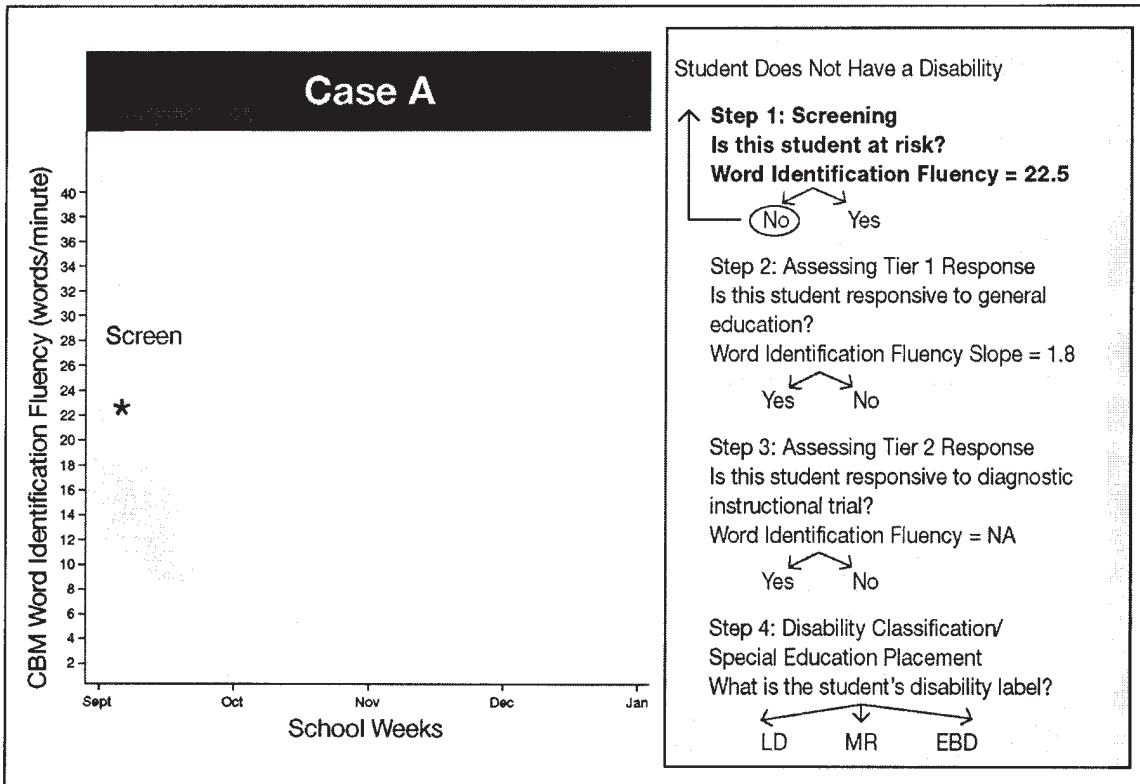
In specifying and illustrating an RTI process, we have expressed several preferences we wish to make explicit. First, our process comprises 3 tiers, with special education as the third tier. Whereas some recommend a greater number of tiers, we believe a 3-tier system best serves both early intervention and disability identification objectives of RTI. Second, we prefer standard tutoring protocols over a problem-solving approach because the available scientific evidence supports the former more strongly than the latter. Third, we conceptualize RTI to include a final comprehensive evaluation phase (Step 4) so that formal distinctions between LD, behavior disorders, and mental retardation may be preserved.

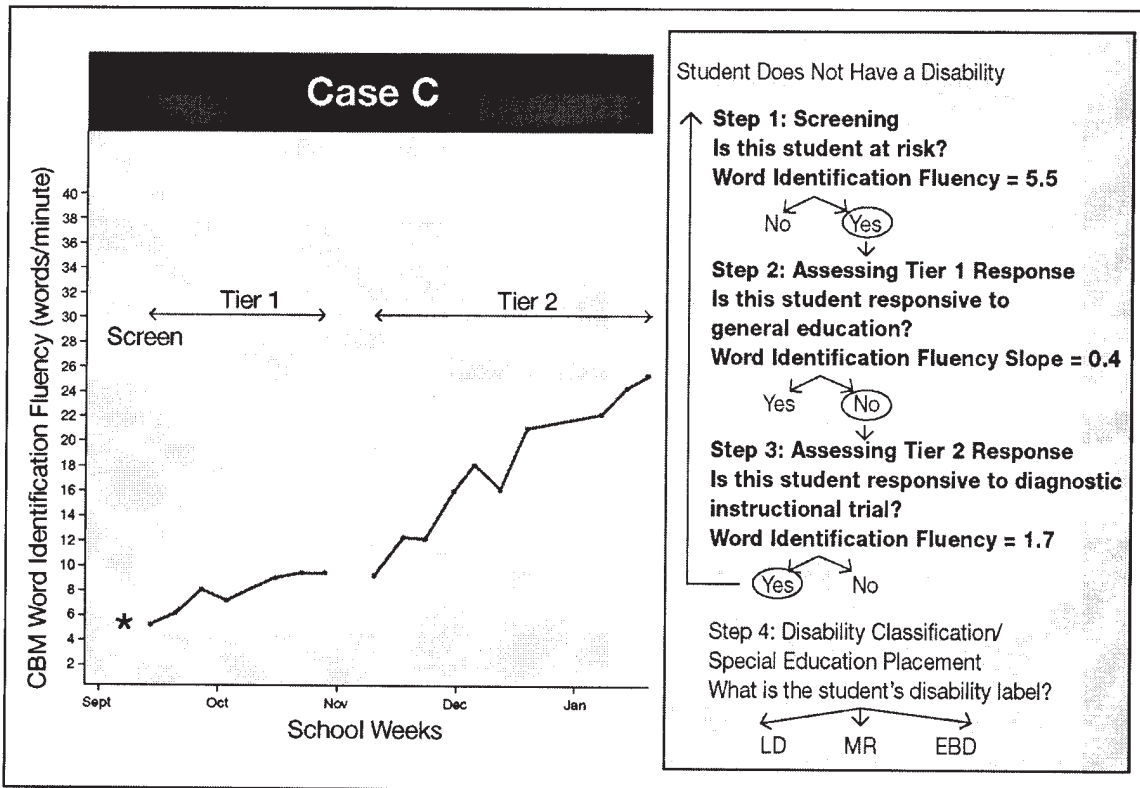
Portions of this article were presented at The Council for Exceptional Children's annual convention in 2005 (Baltimore).

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The University of Maryland (UMD) Department of Special Education

is inviting applicants interested in pursuing a master's degree in special education with an emphasis in severe disabilities. The department is nationally ranked as one of the top ten programs in special education. Excellent opportunity for competitive funding (tuition & stipends) for fully and part-time student is available. Applications are accepted on a continuous basis. For more information, please contact: Dr. Francey Kohl, Project Director, Low Incidence Personnel Preparation Grant, Department of Special Education, 1308 Benjamin Bldg., College Park, MD 20742; Phone: 301-405-6490 or 301-405-6514; E-mail: fkohl@umail.umd.edu. The University of Maryland has a strong commitment to diversity and actively seeks applicants from underrepresented groups including individuals with disabilities.





<u>Position</u>	<u>Year 0</u>	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Year 4</u>	
Headmaster		1	1	1	1	1
Clerical			1	1	1	1
Custodian/Transportation			2	2	2	2
Core Classroom Teachers			6	11	17	22
Specialty Teacher			1	2	2	3
EC Teacher			1	1	1	2
Teaching Assistants			1	2	2	3
Substitute			1	1	2	3
			14	21	28	37

Year 5

1
1
2
30
5
3
4
4
50

Universal Screening: K–2 Reading

This fact sheet focuses on the importance of universal screening in the primary grades to identify students who are in need of reading intervention.

What are the purposes for different types of assessment?

Assessment can have multiple purposes:

- Universal Screening—to determine a student’s risk for reading difficulty and the need for intervention
- Intervention Planning—to make data-based decisions for instruction informed by results of testing
- Progress Monitoring—to determine if progress is adequate or if more (or different) intervention is required
- Diagnostic Evaluation—to identify an individual’s learning strengths and weaknesses and likely source of academic problems—and to determine if profile fits the definition of a learning disorder (diagnosis)

Universal Screening: K–2 Reading

Since research has shown that the rapid growth of the brain and its response to instruction in the primary years make the time from birth to age eight a critical period for literacy development (Nevills & Wolfe, 2009), it is essential to identify the instructional needs of struggling students as soon as possible. It is imperative to “catch them before they fall” (Torgesen, 1998). Thus, educators need to understand:

- The basic principles of universal screening
- Findings from cognitive science that are the basis of reading and literacy development

- Potential risk factors (i.e., “red flags”) that indicate potential for common reading problems, including dyslexia

What is a screening?

Screening measures, by definition, are typically brief assessments of a particular skill or ability that is highly predictive of a later outcome. Screening measures are designed to quickly differentiate students into one of two groups: 1) those who require intervention and 2) those who do not. A screening measure needs to focus on specific skills that are highly correlated with broader measures of reading achievement resulting in a highly accurate sorting of students.

Universal screening tools have the following characteristics:

- Quick and targeted assessments of discrete skills that indicate whether students are making adequate progress in reading achievement
- Alternate equivalent forms so they can be administered three to four times a year
- Standardized directions for administration and scoring
- Have established reliability and validity standards

Why should we screen?

Universal screening results should identify those students who are potentially at risk for reading failure, including those who may have developmental reading disabilities.

Dyslexia is a neurobiological disorder. Research has shown that brain plasticity decreases through childhood. It takes four times as long to intervene in fourth grade as it does in late kindergarten (NICHD) because of brain development and

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because of the increase in content for students to learn as they grow older. Children at risk for reading failure can be reliably identified even before kindergarten. “Deficits in phonological awareness, rapid automatized naming, verbal working memory and letter knowledge have been shown to be robust precursors of dyslexia in children as young as age three” (Gaab, 2017). Extensive evidence exists that supports the fact that early intervention is critical. Struggling readers who do not receive early intervention tend to fall further behind their peers (Stanovich, 1986).

Psychological and clinical implications of poor reading development can be prevented/minimized if we identify and intervene as early as possible.

Screening Administration

A screening instrument needs to be quickly and easily administered. Screening can occur as early as preschool, but no later than kindergarten and at least three times a year through second grade. It is imperative for screening to occur for all children, not just the ones “at risk” or who have already been determined to have reading failure. Students who are English Language Learners or speak in a different dialect should be included in this assessment. Since “dyslexia is strongly heritable, occurring in up to 50% of individuals who have a first-degree relative with dyslexia” (Gaab, 2017) initial screening should include family history. Teacher input on a child’s phonological, linguistic and academic performance is also essential. Teachers can complete screening tools that require their rating of a child’s abilities on a scale to measure risk of reading disability.

What are typical screening measures by grade level?

Although a quick assessment, a screening battery should include key domains, identified as predictors of future reading performance.

Kindergarten

Research indicates that kindergarten screening measures are most successful when they include assessment of the following areas: phonological awareness including phoneme segmentation, blending, onset and rime; rapid automatic naming including letter naming fluency; letter sound association; and phonological memory, including non-word repetition (Catts, et al. 2015; Jenkins & Johnson, 2008).

First Grade

Research indicates first-grade screening measures are most successful when they include assessment of the following areas: phoneme awareness, specifically phoneme segmentation, blending, and manipulation tasks; letter naming fluency; letter sound association; phonological memory, including nonword repetition; oral vocabulary; and word recognition fluency (i.e., accuracy and rate) (Compton, et al., 2010; Jenkins & Johnson, 2008).

The Center on Response to Interventions Screening Briefs indicate that oral reading fluency could be added in mid first grade.
Second Grade:

The Center on Response to Interventions Screening Briefs indicate that in second grade, screening assessment should include word identification, oral reading fluency, and reading comprehension. Word identification assessments should include real and nonsense words.

K – 2

The assessment of oral expressive and receptive language (including vocabulary, syntax and comprehension) provides key information in an individual’s reading profile and is predictive of reading outcomes. Unfortunately, there are limited measures at the K-2 level to assess these

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areas for screening purposes. Without such screening measures, testing for expressive and receptive language is usually done in diagnostic evaluations (Gersten et al., 2008).

There is no one test or assessment tool that measures all reading skills. Different assessments measure different discrete skills. Ideally, multiple measures for screening purposes should be used to ensure that all identified skills have been assessed at the appropriate grade level. When multiple measures are used to screen students, the accuracy of identifying those at risk improves significantly.

Some examples of screening assessment tools include (but are not limited to) DIBELS Next, Aimsweb, Predictive Assessment of Reading (PAR), and the Texas Primary Reading Inventory (TPRI). (Links to these examples are listed at the end of this fact sheet.)

Intervention Planning

Data from universal screenings should be used to make informed decisions about evidence-based interventions and the progress monitoring that should follow. Interventions should address the needs of the student, as identified by the screening process. Progress Monitoring is then done to determine if progress is adequate or if more (or different) intervention is required.

Progress Monitoring

Progress should be monitored frequently to determine the student's response to the chosen intervention and rate of improvement. The IES Practice Guide, *Assisting Students Struggling with Reading: Response to Intervention (RTI) and Multi-Tier Intervention in the Primary Grades* (Gersten et al., 2008) states that progress can be monitored weekly, but should be monitored no less than once per month.

Summary of suggested progress monitoring measures to use in K – 2:

Grade	Measure
Kindergarten	Phonemic awareness measures (especially measures of phoneme segmentation)
Grade 1	Fluent word recognition Nonword (pseudo word reading) Oral reading fluency (connected text)
Grade 2	Fluent word recognition Oral reading fluency

Source:

https://ies.ed.gov/ncee/wwc/Docs/PracticeGuide/rti_reading_pg_021809.pdf

What is a comprehensive diagnostic evaluation and how does it differ from screening?

According to the Dyslexia Assessment Fact Sheet (Lowell, Felton, & Hooks, 2014), a formal clinical evaluation is necessary to determine a diagnosis of dyslexia if the student continues to struggle with literacy skills, despite high-quality instruction using an RTI (Response to Intervention) approach. Areas to be assessed, in depth, by a team of individuals include the following: phonological awareness, phonological or language-based memory, rapid automatic naming, receptive vocabulary, phonics skills, decoding/encoding real and pseudo-words, oral reading fluency, writing at the sentence and paragraph level. Evaluations are completed by trained specialists (e.g., psychologists and neuropsychologists, speech and language pathologists, or educational specialists who have advanced degrees in assessment or education.)

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	SCREENING	EVALUATION
Time Involved	Brief; Administered individually or in a group	Lengthy; Administered individually
Characteristics	Criterion Referenced; Curriculum based measures; Arbitrary cut-off points	Norm Referenced; standardized based on standard scores, percentiles, grade/age based equivalencies
Focus	Specific skill areas	Extensive assessment of functioning (cognitive, academic, linguistic, motoric, behavioral)
Administrator	Teachers	Trained specialist (School Psychologist, LDT/C, Speech Language Therapist)
Reason	Determine students who are at risk and in need of general education remediation	Identify strengths and weaknesses within profile in order to determine classification for special educations placement and services

Screening vs. Evaluation

The role of universal screening in primary grades to identify students who are in need of reading intervention has been widely studied. The old saying, “Just wait and they will catch up,” does not hold up to all the empirical data and support for providing early intervention for struggling readers. Educators need to be well versed in the evidence-based methods that identify the risk for reading difficulty, and they need to make good decisions that provide appropriate educational interventions for their students who may be struggling. These decisions need to be informed by data that is gathered as a result of efficient assessments and progress monitoring that are accomplished in a regular and timely manner. It is critical that educators understand the importance of these factors in universal screening and early intervention to ensure that all students have the best opportunities for developing adequate literacy skills.

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