



NORTH CAROLINA CHARTER SCHOOL APPLICATION

Ballancrest Elementary

Public charter schools opening the fall of 2014

**See Resource Manual for Assistance
(Available late November 2012)**

Due by 12:00 noon, March 1, 2013

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

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

CHARTER SCHOOL

2013 Application Process

To open a charter school in the 2014-2015 school year

APPLICATION DUE DATE/TIME

January 4, 2013

A letter of intent to apply for the 2014-2015 school year **must** be received in the Office of Charter Schools **no later than 12:00 noon**. If the Letter of Intent is not submitted, an application from this group will not be accepted. You can find the Letter of Intent requirements on the NC Office of Charter School web site.

March 1, 2013

A complete application package, one (1) single-sided, signed, and notarized original hard copy, one (1) PDF electronic version of the narrative, and one (1) PDF electronic version of the appendices (i.e. labeled flash drive) must be received in the Office of Charter Schools **by 12:00 noon**.

March 8, 2013

A copy of the application due to the Local Education Agency in which the proposed charter school will reside in. Applicant must provide evidence to the Office of Charter Schools (i.e. signed letter).

APPLICATION SPECIFICATIONS

Applicants **MUST** submit applications prior to the deadline March 1, 2013 at 12:00 noon; applicants are to use the following specifications:

1. All elements of the proposal must be typed with 1-inch page margins and 12-point font, single-spaced, in Times New Roman font.
2. Each major section (Mission, Purposes and Goals, Education Plan, Governance, Operations and Capacity, and Financial Plan) must begin on a separate page, as indicated in the template document. Do not exceed 50 pages for the proposal narrative. (Title Page, Table of Contents, and Appendices are not included in the narrative page limit.)
3. If a particular question does not apply to your team or proposal, **keep the section heading**, respond "Not Applicable," AND state the reason this question is not applicable to your team or proposal. The questions may be deleted.
4. All narrative content pages should be numbered and the name of school should appear at the top of ALL pages
5. All required Appendices should be clearly titled and include page numbers (i.e. Appendix A and page numbers as- A1, A2, B1...).
6. Review all elements of your application for completeness before submitting. An incomplete application may result in the elimination of the application.
7. Late submissions will not be accepted. No exceptions.
8. Provide confirmation to the Office of Charter Schools that within seven (7) days the applicant has provided one full copy of the application to the LEA in which the proposed charter school will be located.

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I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Ballancrest Elementary

Has the organization applied for 501(c)(3) non-profit status: Yes No

Name of non-profit organization under which charter will be organized or operated: Ballancrest Education Outreach

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

Name of contact person: Caroline Lease Walker

Title/Relationship to nonprofit: President of the Board

Mailing address: 1908 Crestgate Drive
Waxhaw NC 28173

Primary telephone: 704-254-7932 Alternative telephone: 704-841-0805

E-Mail address: CarolineLeaseWalker@yahoo.com

Name of county and local education agency (LEA) in which charter school will reside:

County: UNION

LEA: 900-Union County Public Schools

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

No:

Yes:

Is this application being submitted as a replication of a current charter school model?

No:

Yes:

What is the name of the nonprofit organization that governs this charter school? Ballancrest Education Outreach

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2014 Month August

Will this school operate on a year round schedule?

No:

Yes:

Proposed Grade Levels Served and Total Student Enrollment (10 Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
First Year	K,01,02,03,04,05	306
Second Year	K,01,02,03,04,05,06	366
Third Year	K,01,02,03,04,05,06,07	438

Fourth Year	K,01,02,03,04,05,06,07,08	522
Fifth Year	K,01,02,03,04,05,06,07,08,09	596
Sixth Year	K,01,02,03,04,05,06,07,08,09,10	716
Seventh Year	K,01,02,03,04,05,06,07,08,09,10,11	896
Eight Year	K,01,02,03,04,05,06,07,08,09,10,11,12	1075
Ninth Year	K,01,02,03,04,05,06,07,08,09,10,11,12	1075
Tenth Year	K,01,02,03,04,05,06,07,08,09,10,11,12	1075

The State Board of Education provides funds to charter schools, approves the original members of the boards of directors of the charter schools, has the authority to grant, supervise, and revoke charters, and demands full accountability from charter schools for school finances and student performance.

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

ballancrest

President of the Board of Directors

Signature

Title

ballancrest

02/26/2013

Printed Name

Date

II. MISSION and PURPOSES

(No more than three total pages in this section)

Mission:

*State the Mission of the proposed charter school in **one hundred words or less**. The mission statement defines the organization's purpose and primary objectives, describing why it exists. The mission statement provides the foundation for the entire proposal.*

The mission statement of the proposed charter school is as follows:

The mission of Ballancrest is to provide education for gifted students in a green learning environment and to assist students in becoming creative, innovative, responsible and confident members of the modern, global society.

Educational need and Targeted Student Population of the Proposed Charter School:

- 1. Provide a description of Targeted Population in terms of demographics. In your description, include how this population will reflect the racial and ethnic composition of the school system in which it is located. Describe the rationale for selecting the location and student body.*

Union County is next to Mecklenburg County and has both densely populated areas and sparsely populated areas. The county has a population according to the most recent census data of 205,463. This county is primarily Caucasian with 83.8% of its persons falling into this category. The remainder of the population is primarily African American (12.1%) and Hispanic (10.7%). The median income in the county is \$64,813 per household with just over 6% of the county falling below the poverty line. There is a large population of school aged children in the county, with 29.9% of the county's population is under the age of 18.

Our student body will reflect the makeup of the county's demographics and we encourage and welcome diversity. One of our core visions is to celebrate differences and recognize that unique skills come from all races, religions, cultures and socioeconomic backgrounds. Our marketing plan will be designed to encourage all these uniquely gifted students to apply. Our board selected this county, more specifically the western portion of it, because there is a lack of choice in this area for students unless they are accepted into Union Academy or are willing to travel to Mecklenburg County. Even with a slow in the economy this area is a rapidly growing and developing area and many students and parents are seeking a different opportunity for their education.

In addition, the targeted population of gifted students is underserved throughout the area. There is a need for specialized education for these individuals. Developing talent for the nation's future begins in our K-12 schools. Math and science experts have repeatedly called for federal leadership to build both a STEM-proficient workforce and to cultivate future experts and innovators. To accomplish both of these goals, schools must raise the learning floor for all children and raise the ceiling for those students capable of achieving at the highest levels. Currently, a high-ability student's zip code is the determining factor in whether his or her educational needs are being met. Declining resources and competing

priorities coupled with the lack of understanding of giftedness widen the chasm of availability, access, and quality of services for our brightest students. Too often, young talent goes unrecognized and undeveloped, which often leads to boredom, underachievement, and increased drop-out rates, which is a loss for both the student and the community.

This is a need not only in our target area, but across the country. This need is documented further in Appendix A with our survey data and outside study data.

2. What will be the projected enrollment at the charter school and what percentage of the Average Daily Membership (ADM) does that reflect for the local LEA(s) that may be impacted?

The total percentage of students attending charter schools is 3.6%, many of which travel into Mecklenburg county. The impact we would have on our LEA which has 41,344 students, with an ADM of 39,844 is a percentage of .07% in our first year (306 students) with a total by the end of our growth, assuming the county's population stays about the same of 2.6% (1,075 students). Our targeted population is gifted students and families seeking an innovative and unique education. We plan for our student population to reflect the general population of the area with a culturally diverse community within our school.

Ballancrest also feels that our educational offerings will only assist Union County school of which many are currently overcrowded with no further plans for new buildings. This overcrowding affects schools across the county. Antioch Elementary in Indian Trail has a listed capacity of 804 students. This year, 859 kids attend class there. That number is expected to climb to 870 by next year and 888 by 2015. For Porter Ridge Middle School, the listed capacity is 1,200 students, but 1,325 currently attend classes there. That number is expected to climb to 1,363 by next year.

The other schools currently over capacity include Indian Trail Elementary, New Salem Elementary, New Town Elementary, Rea View Elementary, Unionville Elementary, Marvin Ridge Middle, Piedmont Middle, Weddington Middle and Porter Ridge High. Out of that list, Weddington Middle School has the largest number of expected students. For a school that holds a capacity of 1,000 students, Weddington currently has 1,081 attending classes. By 2016, that number is expected to climb to 1,116. The county has almost 300 mobile classroom trailers.

3. Explain how the charter school's education plan will compare to or differ from that of the local LEA(s).

The educational plan we are presenting follows a two pronged approach. We are similar to the LEA by requiring and teaching a standard course of study covering skills needed in various areas, which will be aligned with the NC Standard Course of Study and the Common Core Standards.

We then take this core and expand upon it with the focus on each student's individual abilities and interests. Students learn best when challenged. The utilization of flexible ability grouping eliminates teaching to the middle and allows all students the opportunity to receive instruction that is meaningful, and targeted to their ability level. We believe active engagement and responsibility for one's own education is critical. Students

will be given the opportunity to collaborate with teachers and create learning contracts. Students will communicate and collaborate with their teachers on these contracts to achieve their educational goals in various subject matter. In addition to this, we will also differ from the LEA by encouraging peer assisted learning strategies, which has proven very effective, especially in math. These plans are in line with best practices in gifted education as recommended by the National Association for Gifted Children and research shows that achievement levels for students within class groups is increased.

Through the use of strategies such as flexible ability grouping, differentiation, inquiry-based learning, peer assisted learning strategies and independent contracts students will be receiving different instructional methods than those regularly practiced by the LEA.

There will be increased emphasis on science, mathematics, engineering, technology and then literacy and language arts education will be enhanced across all subjects.

4. *In the appendices (Appendix A), 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).*

Purposes of the Proposed Charter School: *In one page or less, describe how the proposed charter school will achieve one or more of the six legislated purposes, as specifically addressed in the NC charter school statute GS 115C-238.29A, and the proposed school's operations.*

The Six Legislative Purposes of a Charter School are:

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

The charter school we are proposing will achieve each of the legislative purposes of public charter schools.

1 & 6. We will create an environment that with support and training allows our professionals opportunities to be creative and innovative with their teaching while having the freedom to implement their ideas and share their successes with fellow educators. Ballancrest will have frequent professional development and encourage teachers to try new teaching styles in their classrooms and collaborate on the curriculum. There will also be team teaching where teachers are regularly grouped into small groups for sharing

sessions and will instruct each other. This will promote creativity, teamwork, a sense of empowerment and allow teachers to share what is working in each of their classrooms.

2. Ballancrest is very confident in its educational program and welcomes the opportunity to share its successes with measurable and meaningful student achievement results. These results will be seen throughout each school year with our assessments as well as our state test scores. We plan to widely publicize our results and will not be satisfied with anything less than exemplary student and staff achievement. We take full responsibility for achieving these goals and are prepared to be held accountable for the achievements of our program. It is only through providing excellence in teaching and administration that the charter school system will be successful.

3. Our program is very unique and progressive, striving to teach our students how to compete and excel in our ever changing world. We offer a school that is focused on individual learning so that each student's experience will differ based upon their strengths, weaknesses and passions. This program will allow parents another choice for their child's education. This school will offer outstanding practical applications with heavy emphasis on math, science and literacy while exposing each student to numerous other subjects, interests and opportunities for the future. At the same time we seek to create global citizens schooled in technology, green living and sustainability. We want our students leaving us with the knowledge that they can make a difference in their world.

4. Student learning will be improved by creating a safe and inspiring environment with dedicated teachers, a supportive and solid administration and clear, concise and challenging expectations. This along with a supportive parent community will further improve student learning by giving students a creative and rigorous educational path. Allowing students to explore their passions, be held accountable for their actions, learn study skills and self-discipline will not only improve student learning, but also build skills that will allow these students to be leaders and have confidence in future endeavors.

5. Our program is centered on the idea that a gifted education is a good education. Our students will be ability grouped as recommended by the National Association of Gifted Children. Within each classroom students will be with children at their level and also receive the additional individual instruction plan necessary to achieve their educational goals and each student will be expected to perform at their highest level. A large part of working with gifted and at-risk students is the social and emotional aspect of their care. We will have specialized training for all educators to identify individual needs as well as having a counselor who will oversee each child and give special support, guidance and assistance as needed.

Goals for the Proposed Charter School:

- 1. How will the governing board know that the proposed public charter school has attained their mission statement? What metrics will be used to gauge that success, and how often will the metrics be reviewed in your analysis?*

Ballancrest will have regular updates of the MAP assessments performed at the beginning, middle and end of the year. This data will be presented at board meetings so that all board members along with the school's administration will be well aware of any areas that need to be strengthened throughout the year. In addition to the assessments, EOG and EOC test

scores, teacher surveys, parent surveys and student self-assessments will be monitored so that the board and administration can see a full picture of school operations, successes and areas of concern.

The MAP assessments will be given to students upon entry their first year and then at the start of school, the beginning of the second semester and the end of the year. The MAP assessment is a computer generated assessment that accurately gauges a student's achievement level across all subjects and is not grade specific. We have chosen this assessment that is offered by the nonprofit Northwestern Evaluation Association for the following reasons:

They are precise, these are fully adaptive tests that produce a true measure of student growth and achievement.

They are consistent, student growth that can be measured over time from kindergarten to high school.

They are scaleable, these assessments produce aggregated data that meets the needs of decision makers at all levels including teachers, the curriculum coordinator, the administration and the governing board.

They create data for a wide variety of specific needs our school has, this data creates instructional groupings, determines place and predicts proficiency on high stakes tests.

These assessments along with state test scores, parent feedback, teacher assessments and student self-assessments will be analyzed by the board twice per year to evaluate the school's effectiveness.

- 2. Provide specific and measurable student achievement performance goals for the school's educational program and the method of demonstrating that students have attained the skills and knowledge specified for those goals. These goals should include specific and measurable performance objectives over the first five years of the schools existence.*

Goals followed by the method used and date of completion.

Goal: Students will show continual growth across academic areas.

Method: Continual assessments performed throughout the year (start of school, start of second semester, end of the year), and used as tools by the teaching staff to see areas of need and areas of growth. Full assessments done three times per school year with continual review by the teachers, administrators and reports presented to the board at board meetings for review.

Completion: Ongoing

Goal: 85% of Students reaching proficient and above on EOGs and EOCs in the first year of operation. Method: Subject specific benchmark tests, teacher observations, and formal assessments

Completion: 6/15

Goal: 90% of Students reaching proficient and above on EOGs and EOCs in the second and third years of operation.

Method: Subject specific benchmark tests, teacher observations, and formal assessments

Completion: 6/16, 6/17

Goal: 95% of Students reaching proficient and above on EOGs and EOCs in the

fourth and later years of operation.

Method: Subject specific benchmark tests, teacher observations, and formal assessments

Completion: 6/18

Goal: 100% graduation rate

Method: Continuous monitoring of grades and test scores and communication with students and parents; academic support when needed; high academic and behavioral expectations

Completion: First graduating class in 2022

Goal: 100% college acceptance of student applicants. All students will be encouraged to apply regardless of career goals. This way they have all options open to them.

Method: Continuous monitoring of grades and test scores and communication with students and parents; academic support when needed; high academic and behavioral expectations; college and career counseling and support; PSAT testing and SAT testing support.

Completion: First graduating class in 2022

Goal: SAT and ACT scores well above state average. (State average 997, National Average 1,010) The College Board Recommends a 1550, this is the score we will strive to have 75% of students reach.

Method: Administration of PSAT in grades 9, 10 and 11, continuous communication of results with students and parents; structured and focused tutoring, student goal setting Administrations of SAT and ACT

Goal: Independent contract work that demonstrates creativity, personal goal setting, discipline and advanced cognitive skills

Method: Constant monitoring by teacher mentors, presentation of contract work by the student, parent involvement in student successes. Presentations of contract work to the administration and the board on an ongoing basis.

Goal: Exit project that demonstrates creativity, innovation, use of knowledge and skills in real world application and student confidence to pursue and achieve goals.

Method: Teacher mentored, ongoing student support and resources, evaluation of student self-assessments, ongoing communication with parents, support of administration and teaching staff from the board of directors

Completion: First graduating class in 2022

Goal: Positive impact on the community.

Method: Students will complete a yearly project with their class that will identify a problem within the community, create a solution, implement it and then present it at the end of the year.

Completion: 6/15

III. EDUCATION PLAN

(No more than ten total pages in this section)

NOTE: *All sections of the Education Plan should align with all other sections of this application. The State Board of Education shall give priority consideration to the applicants who demonstrate potential for significant, meaningful innovation in education. Provide precise and clear explanations. Lack of response to any question or proper documentation could deem the application incomplete.*

Instructional Program:

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.

The overall instructional program for Ballancrest will follow and expect all students to master the skills as outlined by the NC Standard Course of Study and the Common Core Curriculum as well as additional activities using upper level Blooms Taxonomy. We will have a very strong emphasis on literacy and STEM. Outlined below are the ideals for each core subject matter accompanied by the instructional methods we plan to utilize including, flexible ability groups, differentiated instruction, inquiry-based learning, project-based learning, mentored study, independent contract study and the utilization of technology in all subject areas.

I. Reading and Writing: It is imperative that students become exceptional readers. Reading is imperative for the gifted child. Great emphasis will be placed on reading across the curriculum. In addition, support will be provided to reinforce any deficient reading skills. With writing education starting with emergent writing in kindergarten students learning will be enhanced by a variety of writing experiences.

A variety of proven techniques and tools will be utilized such as:

- a. Wilson Reading
- b. Individual Tutoring
- c. Technology
- d. Phonemic Awareness
- e. Phonics Fluency
- f. Vocabulary
- g. Text Comprehension
- h. Exposure to a variety of fiction and nonfiction genres

II. Math: Math curriculum will begin with a basic text such as Saxon Math. As students progress instructors will assess their progress and decide the best course of study for them if they have mastered the age appropriate North Carolina Common Core Curriculum goals. This could include:

- a. Movement to an advanced class
- b. Advanced study utilizing technology
- c. A contract of study in which they will need to apply mathematical principals (drawing blue prints for a dream house, planning a trip around the world, etc.)

III. Science: Hands on inquiry based science program is a large part of our curriculum. Research in science education suggests that a curriculum based on in-depth understanding of science concepts and new science standards that focus on investigatory rather than a more traditional approach best develops the talents, interests and motivation to do science in the real world for

talented learners. Traditional science is focused on facts, laws, theories and laboratory applications of concepts previously covered in class. In contrast, we plan to focus on science teaching that promotes the nature, structure and processes of science. Each grade has mastery concepts and specific goals. We will then focus on how one arrives at scientific conclusions and provide for hands-on, in-depth study that meets the needs and interests of the high-ability student. This has proven to be very effective and a number of empirical studies demonstrate not only academic, but also many motivational benefits as a result of utilizing inquiry-driven, realistic science programs with gifted children.

- a. Hands on activities
- b. Mastery of advanced problem solving skills
- c. Real world applications
- d. Natural world observations
- e. Student led discussions and inquiries

IV. Social Studies and History: Complex learning in history occurs when teachers incorporate primary sources and provide students with opportunities to think and write like historians. Students learn strategies for interpretation in historical problem solving and increase their ability to write from primary documents. Talented students must be taught explicitly about the use of evidence and how to corroborate, source, and contextualize documents.

- a. Mastering sequence of events skills and the ability to piece together evidence and corroborate facts
- b. Providing instruction to learn and identify causes and consequences
- c. Utilizing both primary and secondary sources of information
- d. Teaching focus on thinking historically and complex understanding
- e. Asking complex, open-ended problems
- f. Increased opportunity to write from primary historical documents
- g. Teacher modeling for historical thinking

K-12 Curriculum and Instructional Design:

Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure.

The learning environment will be one that fosters creativity and celebrates uniqueness. Our organization has been working closely with John Shurley of Insight Architects who specializes in charter facilities to create a learning space that helps us achieve our goals. The classrooms will be designed with small group and individual work in mind, not just whole group instruction. One of the main components of our program is flexible ability grouping and individualized learning so it will be very common for many activities to be happening in the classroom at once. It is for this reason that we will need to have a staff that is well trained, well educated, dedicated and creative. The maximum for K-2 classrooms will be 18 children and then 20 children for every grade past that. We will have a very strong emphasis on community with each class identifying a problem within the community at the beginning of the year, brainstorming, coming up with a solution, planning and executing the solution throughout the year and then presenting it to the community the last week of school. We will also be utilizing a large amount of group work within the classroom with the children assisting in mentoring and tutoring each other. This has been proven to be extremely effective with gifted children. We will encourage appreciation of each other's work through independent project presentations.

Students work, awards and accolades will be prominently displayed throughout the school. Another important component of our program is integration of technology which will be found throughout the classroom. Students will work on handheld computers, utilize educational applications and textbooks and learn to research and disseminate information. This will be a highly creative, active and inspiring environment for our students.

Provide a synopsis of the planned curriculum, including:

1. One sample course scope and sequence (preferably in graph form) in the Appendices (Appendix B1) for one core subject (specific to the school's purpose) for each division (elementary, middle, high) the school would ultimately serve.
2. As Appendix B2, provide a visual disseminating what courses (core content and electives) will be offered in year one through year five of the charter high school. Please ensure the projected staff and budget aligns with the course offerings.
3. Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model.

This curriculum was specially designed to meet the needs of our targeted population of gifted students. The curriculum will be very demanding and challenging for this population of students that will have the ability to move at a faster pace. Ballancrest has crafted this curriculum using flexible ability grouping and utilizing higher level Blooms Taxonomy as supported by the National Association of Gifted Children. This will allow every one of our students to move at their own pace. The Ballancrest Curriculum is designed with a very heavy emphasis on literacy, math, science and technology. Our students will use modern technology to seek information, disseminate what is useful and then use their skills to apply practical applications of this knowledge. This will allow students the opportunity to do what is most important with this knowledge, be creative. To grow and mentor creative thinkers who are able to enter our society as innovative leaders is one of the major goals of Ballancrest's program. Through our use of an advanced curriculum and technology these students will also learn about the needs of our world through sustainability and a green environment. Most of all these students, through their freedom to pursue interests with a mentor will learn to have the discipline and accountability to set goals for themselves, formulate a plan of action and then follow through with their plan. These are real skills that will create what we most desire, a population of students not afraid to branch out, push their limits and become truly unique, responsible, capable and confident citizens of the modern, global community.

These goals and methods of teaching were researched in depth by our curriculum coordinator. The use of various tools including ability grouping, individualized learning plans, individual student learning contracts and the level of the advanced curriculum are in line with all current recommendations and best practices in gifted education. Ballancrest's program was created for the sole purpose of serving our targeted population of gifted students.

Ballancrest will follow all course requirements and standards outlined in the NC Accountability Model. By giving our students the academic skills and following the NC Common Core Curriculum these students will have the tools to move in any direction in life they desire. In addition, by focusing on the areas of literacy, science, math and technology we will be creating

students who have the skills most needed for the careers of tomorrow. By educating these student to have the core skills, with a heavy emphasis on the key subjects and allowing students to pursue interests through mentored study and an individualized learning plan these students will be exiting our program with not only the knowledge of what they are interested in, but knowing that they are capable of moving in any direction they wish in life. Furthermore, with the career counseling and wide breadth of course offerings inthe higher grades will give these students all the tools and discipline they need to leave us and achieve whatever life goals they set for themselves.

4. 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.

Teachers at Ballancrest will be expected to come in as highly skilled educators and then continue to improve their craft through frequent trainings and Ballancrest's group improvement plan and idea shares. The major instructional strategies that will be expected of all teachers at Ballancrest include:

Abstracting, Adaptive Learning Environments Model (ALEM), Application Teaching, Applied Imagination, Assumption Smashing, Basadur Simplex, Blended Learning, Bloom's Taxonomy, Computer-Assisted Instruction, Circles of Learning, Cognitive Apprenticeship, Collaborative Learning, Emergent Literacy, Error Analysis, Flexible Ability Grouping, Differentiation, Individualized Instruction, Integrated Learning Model, Lateral Thinking, Inquiry-based learning and Mentoring.

Teachers will practice:

- Posing open-ended questions that require higher-level thinking
- Modeling thinking strategies, such as decisionmaking and evaluation
- Accepting ideas and suggestions from students and expanding on them
- Facilitating original and independent problems and solutions
- Helping students identify rules, principles, and relationships
- Taking time to explain the nature of errors

The research on which strategies and methods are appropriate for gifted students only and which ones

work well for all students is not conclusive. Many of the strategies established by research and recommended

by experts are similar to, if not the same as, recommendations from the national standards documents for mathematics and science (National Council of Teachers of Mathematics [NCTM], 1989; National Research Council [NRC], 1996). As is so often the case, teachers are the most reliable experts. They will need to try the

strategies for themselves and use their own judgment in determining how well they work for students.

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

Ballancrest's education plan aligns with the North Carolina High School Graduation Requirements with additions to meet the mission and goals of the school. Students will receive the necessary education in Math, Science, English, Social Studies and then also have the opportunity to explore additional electives, be required to take three years of languages and several years of liberal arts education. The instructional plan Ballancrest is proposing will give the students opportunities to build the skills needed

for a post-secondary education and for life. Students, through their studies, will develop skills to work in a large group, be a member of a small group team, work individually, be disciplined, set and achieve goals, be held accountable and self assess their own progress. These are tools that will be needed in any future endeavor be that a university setting, trade school or other career path. In addition, as part of the Mathematics portion of the graduation requirements students must complete a Financial Management course that will teach basic skills for moving forward in life. For example, students will learn money management, how banks work, how credit cards work, how to properly calculate interest, financial terms, long term financial planning, life insurance, IRAs, etc. Walking into the world with a basic knowledge of these things will allow our students to plan for the future and act as responsible adults in whatever setting they choose next. In addition, part of our graduation requirements in the Physical Education section is a Health and Wellness course designed to teach the students about what their bodies will need as they get older and how to live a healthy lifestyle. Basics such as nutrition, exercise and lifestyle will be covered. Finally, as part of their graduation requirements each student will take a Life Planning course which will cover career choices and paths, college preparedness, and real world applications of the knowledge they have acquired at Ballancrest.

6. Provide a school academic calendar (minimum of 185 instructional days or 1,025 hours) and a brief narrative on how the calendar coincides with the tenets of the proposed mission and education plan.

The proposed school calendar will fall closely in line with that of Union County Public Schools. Ballancrest will not function as a year round school, but it will have 8 additional days as well as an extended school day. This extended school day and 8 additional days correspond to the school's high academic standards and education plan in order to achieve our goals and mission. In addition, Ballancrest will have an effective academic day and have a limit on the amount of homework that can go home. For example, K-2 will have no homework, 3-5 will have a 30 minute limit on homework and 6-12 will have an hour limit on homework (this does not include reading time). Ballancrest believes that if it functioning efficiently and effectively all necessary academic goals can be accomplished within the course of the extended day and extended year . In addition, it is our belief that family time and play time are extremely important to a child's development and unnecessary homework can take away from a child's home life. Parent communication will be very important so that parents are informed of what their child is working on. The sample calendar for the 2014-2015 school year is included in Appendix R.

Special Programs and "At-Risk" Students

1. Describe the methods and clear systems of prevention and intervention teachers will utilize to provide assistance to students that are not performing at expected levels: ensuring continued progress and academic student growth.

Ballancrest believes that early intervention to address poor student performance is key and it is only by having an effective and well trained staff that problems can be caught early and addressed. Ballancrest will have small class sizes so that students that appear to be struggling can be recognized early and receive one on one instruction. In addition, the use of flexible ability grouping will allow our staff to place a student where they are able to move at a pace suitable for them. Assessments will be done by teachers throughout the year and reported to the administration in order to track student progress. These assessments will align with the goals and

proposed standards for each age in each subject. Teachers will be trained on how to identify students who may be struggling or falling behind, assess their areas of need and submit the assessment to the counselor and the administrators. There will then be an action plan implemented on a per student basis to address each student's areas of need. For example, we have a third grade student who is falling behind in math. The student's math teacher recognizes the student's struggles, completes the student's assessment to identify where the student is and what support is needed, the assessment is then given to the counselor and the administration. There will then be a plan formulated with the administration, the counselor and the teacher where a plan of action will be devised. A copy of the assessment as well as the plan of action will be presented to and discussed with the parent so that they may support the school's efforts at home. In addition, once students reach an acceptable age Ballancrest will also be using self-assessment tools which will be very valuable and allow the teachers to see where the student feels he or she is lacking or not completely understanding. Once a child reaches this point they will be included in the planning portion of their action plan. Constant monitoring and communication between students, teachers, administration and parents is necessary for this to be successful. This dedication on the part of all parties as well as the organized plan will ensure continued progress and ensure academic student growth.

2. Explain how the instructional plan and curriculum will meet the needs of English Language Learner (ELL) students, including the following:
 - a) Methods for identifying ELL students.
 - b) Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for these students.
 - c) Plans for monitoring and evaluating the progress and success of ELL students, including exiting students from ELL services.

Upon entrance into the school, after the lottery, families will complete a questionnaire with questions related to languages spoken in the family and at home as well as asking the parent's first language. This along with the student's history will assist the staff at Ballancrest in identifying possible ELL students.

Ballancrest will utilize modifying instruction techniques to meet the needs of their ELL students. Modifying instruction is critical to ELL student's success. However, modifying instruction doesn't mean creating a second lesson plan or curriculum; it just means changing some of the ways you do things. Most of our native English-speaking students can benefit from modifications as well.

Technique to be utilized by Ballancrest teachers with ELL students:

- Teach to varied learning styles
- Encourage students to participate in class
- Have high expectations of your students
- Give students more wait time: at least 15-20 seconds
- Assign students a bilingual or English-speaking study buddy
- Use cooperative learning and put students in groups with English-speaking students
- Use lots of visuals, like graphic organizers and pictures
- Use physical activity: model, role-play, act out
- Repeat and rephrase often
- Emphasize the 5-8 most important vocabulary words of a lesson

- Focus on the 2-3 key concepts of a lesson
- Give students an outline of the lesson that highlights the key concepts
- Let ELL students copy someone else's notes
- Write in print unless specifically teaching the manuscript alphabet
- Give simple instructions
- Use concrete language and questions
- Simplify complex questions
- Use children's literature/lower grade level materials to teach content
- Incorporate the 4 skills of language acquisition: reading/writing/listening/speaking
- Check understanding using "show me" techniques
- Class/Homework

Ballancrest teachers will assess ELL students according to what they can do rather than what they cannot do.

Standardized tests or even teacher-created tests can't always measure ELL student's progress accurately or authentically. Instead, measure ELL students by what they can do at any point in time, keeping in mind what they could not do earlier. Have they shown progress? Have they sincerely made an effort to learn? Have they demonstrated their learning?

3. Explain how the school will identify and meet the needs of intellectually gifted students, including the following:
 - a) Specific instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.
 - b) Plans for monitoring and evaluating the progress and success of intellectually gifted students.

Ballancrest's mission is to serve the intellectually gifted child who has a lack of educational options in the current system. Ballancrest's entire educational plan is geared toward serving these students, but at the same time it is also unfair to put all intellectually gifted students into one category as there are different types and levels of giftedness. For example, some are highly gifted in languages and verbal abilities, but may struggle in their math courses. Some may be extraordinary engineers, but struggle with their verbal abilities and reading comprehension. We may have a student who is an amazing musician, but struggles in their science classes. All children are different and the admissions procedure along with the curriculum at Ballancrest was designed to recognize that. We will have a wide range of abilities in different areas at our very unique school and we must be well equipped and prepared to handle all of these combinations of student gifts. Teachers will utilize flexible ability groups so that, for example, the child above who is gifted in English, but struggles in math may be in the highest English group and pushed to meet his full potential, but then will be in a math group moving at the level that student is capable of. Students will be motivated to reach their full potential in all subjects. Smaller class sizes, specially trained teachers, flexible ability grouping, independent study options, frequent assessment and social/emotional support will only add to the strength of Ballancrest as it strives to provide an exemplary gifted education.

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)* Amendments of 2004 (20 U.S.C. 1400 et seq.), 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 educators pursuant to law. Public schools are required to provide a full continuum of services to meet the unique needs of ALL students with disabilities.

Identification and Records

1. 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.
2. 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.
3. Provide a plan detailing how the records of students with disabilities and 504 Accommodation plans will be properly managed.
 - a) Requesting Records from previous schools
 - b) Record Confidentiality (on site)
 - c) Record Compliance (on site)

Ballancrest refers to these students as twice exceptional as it is very common for gifted students to also have learning disabilities. Students who have been previously eligible for special education services or are protected under Section 504 of the Rehabilitation Act will be entitled to all services at Ballancrest. These children's files will be requested from the child's previous schools confidentially and used as a jumping off point to begin the student's IEP. These students will receive an assessment upon entrance into the school and using this assessment along with prior records the school's special services teacher, the child's teacher and the counselor will develop an Individualized Education Plan, (IEP) for the student that will have specific goals and action items included. Based upon what is needed for each student a schedule to meet with the special services teacher will be included with this IEP as well as frequent progress reports. These progress reports will help to monitor and assure that the student and staff are reaching their goals or reassessing them based on need. Students that are of an acceptable age will assist with the setting of their goals. Any student recognized to have a problem/disability after beginning at Ballancrest will be assessed by the special services teacher and will receive an IEP in accordance with all policy and then will be supported and monitored throughout the remainder of their school career. In addition, any student that is requested to be evaluated by either a teacher or a parent will be in accordance with Child Find. All students will have access to these services if needed. These student's records will be confidential with their master file located in locked drawers in the principal's office and only the necessary information in a locked cabinet in the special services office. All files will be kept confidential and only released in accordance with the law.

Exceptional Children's Education Programming

1. Describe the educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities.
2. Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).
3. Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents and relevant staff.
4. Describe the proposed plan for providing related services.

For each area of weakness identified in a student with a learning disability, careful review will determine those areas in which that same

student shines. For example, some students with written language issues show a strength in mathematical computation, other students with difficulty with organization show a great ability to memorize, while still others with difficulty in reading show great strength in their ability to communicate verbally. Ballancrest will find and celebrate those strengths which are often the difference between success and failure for these students with learning differences.

Teachers will implement the following strategies to assist these students:

Strength/Interest-Based Strategies

- Provide fast-pace instruction and provisions for progress through curricula at the students personal learning rate.
- Place emphasis on higher level abstract thinking and problem solving.
- Utilize pre-testing to identify what students know and eliminate unnecessary drill.
- Use instructional planning that anticipates diverse learning needs and characteristics of individual students.
- Use inter-disciplinary instruction and application of learning content to aid students in making connections.
- Place emphasis on students interests, learning styles, and strengths.
- Provide opportunities for independent and small group projects and investigations.
- Create a conceptual framework or overview of new material for conceptual/holistic processing.
- Utilize concept-based thematic instruction.

Accommodations to Access Learning

- Provide class notes and step-by-step homework instructions.
- Extend time for students with slow processing and fluency issues
- Allow audio/video taped, verbal, or display responses instead of written response.
- Use technology to increase productivity.
- Provide sound blocking headphones and preferential seating away from distracting noises.
- Chunk new learning into manageable subtasks.
- Use audio system for a student with auditory processing or hearing problems.
- Create kinesthetic response and visual graphs/charts to support learning and demonstrate relationships.
- Incorporate organizational activities into classroom activities.
- Make sure students understand the homework by having them retell what they are to do.
- Team disorganized student with a well-organized student for collaborative project, making sure each student can contribute from a strength area.
- Provide comfortable furniture, exercise ball, lap weight.
- Develop teacher/student predetermined subtle signals to indicate needs.

Explicit Instructional Strategies: Compensatory Strategies

- Teach students to create flow charts, graphic organizers, and cognitive webs.
- Train students how to identify important facts or concepts and to create outlines or webs.
- Use self-talk to accompany visual input.
- Coach students in the use of mnemonics to enhance memory.

- Teach meta-cognitive/mental scripts that emphasize self-regulation.
- Demonstrate and teach task-analysis and prioritization strategies.
- Teach strategies to maintain attention, like sitting up straight and leaning upper body toward speaker.
- Highlight and color-code to organize and prioritize new information.
- Provide instruction in self-directed learning skills with emphasis on study skills, time management skills, organizational skills etc.

Explicit Instructional Strategies: Intervention/Remediation

- Coach students in setting realistic long-term and short-term goals.
- Teach students to chunk or break down project into steps and talk through steps.
- Instruct in systematic multi-sensory approaches.
- Teach students how to rephrase key ideas and link to key words.
- Teach strategies to group and categorize information.
- Provide direct instruction in organization, time management, and study skills.
- Provide explicit instruction in phonological awareness, phonics, and decoding.
- Teach verbal mnemonics and rhyming to increase automaticity.

Student Performance Standards

1. Describe the student performance standards for the school as a whole.
2. 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.
3. 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.
4. Provide the public charter school's exit standards for graduating students. These standards should set forth what students in the last grade served will know and be able to do.

Students at Ballancrest will be assessed throughout the year by the teaching staff with yearly state mandated testing at the end of the year. Students will have levels of proficiency as follows:

Below basic: Testing below grade level.

Approaching Basic: Testing below grade level, but improvement has been documented.

Basic: Testing at grade level.

Approaching Proficient: Testing at grade level with improvements documented.

Proficient: Testing one grade above grade level.

Advanced: Testing two or more grade levels above expected.

Ballancrest aims to have 85% of students testing at grade level at the end of year one, 90% at the end of years two and three and 95% in subsequent years.

Along with the state mandated end of year testing Ballancrest will administer MAP assessments three times per school year, once at the beginning and once in the winter and then once at the end of the year. The staff will these throughout the year. Each assessment will be specific to each student and not grade level specific. These MAP assessments use best practices as recommended by the National Association of Gifted Children and

take into account the whole child. These assessments will also greatly improve the experience and performance of each child by being able to see a graphic representation of the student as a whole. This whole picture will show patterns of learning behavior, strengths and weaknesses. This information can then be used by teachers, parents and the student to grow their areas of giftedness and work on problem areas.

In order to be promoted to the next grade students must be reaching a level of proficiency on at least 75% of the MAP assessment for their grade as well as meeting the state requirements of testing at a Level III on the state end of grade tests in reading and mathematics for the children grades 3-8 as well as testing at a writing level of 2.5 or above. In addition, grades 4-8 will be held to scoring at the proficiency Level III on all subjects as well as achieving their writing level.

To graduate from Ballancrest High School students will need to achieve the following:

A end of year score at Level III or above on the end-of-course assessments for English I, U.S. History, Biology, Civics and Economics, and Algebra I.

Completion of 24 credits including 4 credits in English, 4 credits in mathematics, 4 credits in science, 4 credits in social studies, 3 credits in world languages, 1 credit in physical education, 1 credit in life planning and 3 credits in liberal arts. In addition, students will complete an exit project. Each student will be required to plan, execute and present a senior project prior to graduation. They will be assisted with the planning and mentored through the process by their teacher advisor.

Students graduating from Ballancrest should be proficient in mathematics, English, Science, Social Studies, possess world knowledge and the ability to become a good global citizen, should have a solid base in at least one additional language, should be skilled with technology, should have the ability to be creative and innovative, should have explored career paths that interest them, should have the study skills and discipline needed for higher education and should have the passion and excitement to attack and change their world.

Students will receive quarterly report cards, copies of student assessments and be promoted to the next grade using the above described evaluation of EOGs/EOCs. Special consideration will be taken for twice-exceptional students by taking a case by case basis and using our faculties expertise. NC policies regarding grade promotion will be followed.

High School Graduation Requirements

1. If implemented, describe how the proposed charter school will meet the Future-Ready Core requirements. Provide details on how the students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts.
2. Explain the plan for graduating students with special education needs.
3. Explain what systems and structures the school will implement for students at risk of dropping out and/or not meeting the proposed graduation requirements.

High School Graduation Requirements for Ballancrest High School:

These requirements were structured to align with the Future-Ready Core requirements with additional requirements specific to our program.

English 4 Credits

I, II, III, IV or

a designated combination of 4 courses with electives offered including: Journalism, Advanced Logic and Composition, Creative Writing, Shakespeare, African American Literature, Business Writing

Mathematics 4 Credits

(Algebra I, Geometry, Algebra II, Trigonometry, Statistics, Calculus, Financial Management)

*All students are required to complete Financial Management

Science 4 Credits

Physical science course, Biology, Environmental Science (1/2 year), Physics (1/2 year) and Chemistry are required. 2 additional credits in electives are recommended, but not required. Electives will include:

Advanced Physics, Advanced Chemistry, Marine Science, Astronomy, Anatomy and Physiology, Genetics and Forensic Science

Social Studies 4 Credits

Civics and Economics,

World History,

American History

History Electives: African American History, Latin American History, Cultural Anthropology, Psychology, Constitutional Law, Modern World History, Sociology

World Languages, 3 Credits

Spanish, Chinese, Arabic and Sign Language will be offered. All students will be given a basis in Latin due to its usefulness across many subjects.

Health and Physical Education 1 Credit

All students will be required to take Nutrition, Exercise and Healthy Lifestyles

Liberal Arts 3 Credits:

Literature and the Arts, Art History, The Practice of Art I, The Practice of Art II, Computer Aided Art and Graphic Design, Drama I, Drama II, Music Theory, Orchestra, Jazz Band, Voice

Life Planning 1 Credit: All students will be required to complete the life planning course which will cover career choices and paths, college preparedness, and real world applications of the knowledge they have acquired.

Exit Project: Each student will be required to plan, execute and present a senior project prior to graduation. They will be assisted with the planning and mentored through the process by their teacher advisor.

Special education needs graduation plan: This will be done on an individual basis based upon each student's individual needs and challenge areas. With the vast array of needs that we may have Ballancrest feels that this is the best way to do what is best for each student. For example, let's say that we have a student who is dyslexic. Generally, languages are extremely difficult for a student with dyslexia. Ballancrest would then meet with the student and their parents, assess their ability to achieve our requirements and then

formulate an individual graduation plan. In this case, perhaps this student is extremely gifted in music. We would then require only one credit in Languages to give this student at least the exposure and then allow them to complete two additional credits in Liberal Arts.

Through our small class sizes and close contact with each student Ballancrest intends to catch problems with students early. Ballancrest will have a full time counselor to assist with any social and emotional issues a child may be facing as well as that student's teacher advisor to assist with any academic problems that may arise. Ballancrest will implement a structure whereby students are regularly monitored by their advisor and those that the advisor sees troubling behavior in would then also be seen regularly by the counselor. We would also provide the academic support necessary for those students who may be struggling to keep up with our standards. By having each child move at their own pace, monitoring their progress with an advisor, utilizing the counselor and keeping in constant communication with both the student and the parents, we can assist all students in graduating successfully.

Student Conduct:

Provide a brief narrative that disseminates 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.

Provide a draft copy of the student handbook within the appendices (Appendix C).

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 regards 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.

While Ballancrest does have a disciplinary action code the goals of Ballancrest's discipline plan focus on creating self-discipline within our student body. Some of the methods we will employ include:

- Implement curriculum activities that teach social, emotional, and behavioral competencies.
- Provide multiple models of social and moral problem solving and responsible behavior.
- Provide multiple opportunities for students to apply skills of social and moral problem-solving and responsible behavior.
- Challenge self-centered thinking.

Additional Prevention Strategies will be implemented including:

- Develop social problem-solving and decision-making skills among students.
- Establish and maintain close communication with each student's parents or caregivers, and work hard to garner the parents support.
- Provide academic instruction and activities that motivate learning.
- Create a physical environment that is conducive to teaching and learning.
- Establish predictable procedures and routines.
- Frequently monitor student behavior and respond immediately to signs of misbehavior.
- Use praise and rewards strategically to maximize effectiveness in improving

behavior while minimizing the risk of diminishing intrinsic motivation. One key to doing this is by using praise and rewards in an informational rather than controlling manner.

Additional disciplinary action can be taken by the administration for those actions deemed serious including, loss of extra-curricular activities, suspension and expulsion. Ballancrest has outlined and defined each offense in Appendix C in the student/parent handbook.

The staff at Ballancrest strives to provide positive reinforcement to students who demonstrate safe and kind behavior at schools. We acknowledge students through individual classroom recognition activities as well as schools-wide programs. We recognize students for their outstanding work, behavior, effort, and attitude.

Appropriate behavior is discussed, modeled, and practiced in the classroom, at school assemblies, and on the playground. Teachers may choose to use a "card system" or other tool to help students keep track of their own behavior. Classrooms may develop their own standards for behavior and logical consequences consistent with the school norms. These may also be modified for use during enrichment classes, outdoor activities, and field trips.

If a student chooses to not follow the classroom rules and schools expectations, some or all of the following logical consequences may be implemented:

- * The student may be redirected and given a reminder about appropriate behavior.
- * The student may be asked to move to another location within the learning group.
- * The student may be asked to move to a focus table or similar location for a period of time.
- * The parent/guardian may be called.
- * The student may lose a privilege (such as recess, other activity or field trip).
- * Assignment time spent before school.

In cases of repeated or extreme disruption or unsafe behavior (including but not limited to throwing objects, bullying, destruction of property, profanity, obscenity, cheating, lying), some or all of the following steps may be implemented.

- * Referral to the office.
- * Parent conference with the teacher and/or principal.
- * Student behavior agreement.
- * Assignment related to learning self-discipline and responsibility.
- * Modification of a students day or activity.
- * Schools Behavior Citation

Students and parents are suggested to speak to the principal regarding a grievance first and then should the issue remain unresolved, the board will intervene. Times will be set aside to address any grievances.

Ballancrest's discipline policy and expectations will not vary for any student, however, if a faculty member feels an alternative plan needs implemented they may work with the school's counselor and seek the

principal's approval.

IV. GOVERNANCE, OPERATIONS and CAPACITY

(No more than ten total pages in this section)

NOTE: Please answer all sections completely. Do not use "same as LEA" or "whatever the law states". Lack of proper documentation could deem the application incomplete.

Governance:

Private Nonprofit Corporation:

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

Name of Private Nonprofit: Ballancrest Education Outreach

Mailing Address: 1908 Crestgate Dr.

City/State/Zip: Waxhaw NC 28173

Street Address: 1908 Crestgate Dr.

Phone: 704-254-7932

Fax: 704-943-1367

Name of registered agent and address: Caroline L. Walker
1908 Crestgate Dr.
Waxhaw, NC 28173

FEDERAL TAX ID: 46-1188168

Tax-Exempt Status 501 (c)(3)

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

X Yes (copy of letter from federal government attached: Appendix D)
No

NOTE: If the non-profit organization has yet to obtain the 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.

Governance and Organizational Structure of Private Non-Profit Organization:

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

Please complete the table provided depicting the founding members of the nonprofit organization.

Board Member Name	Board Title	County/State of Residence	Current Occupation
Heather Sorsby	Board Member	MECKLENBURG	Accounting, HR and Bookeeping

			Specialist
Sarah K. Whitmore	Secretary	MECKLENBURG	Teacher
Anthony Vigliotti	Financial Officer	MECKLENBURG	Financial Services and Compliance Expert
Dandan Liu	Vice President of the Board	MECKLENBURG	UNC Pembroke Professor
Julie G Lease	Curriculum Coordinator	UNION	Gifted Education Teacher and Small Business Owner
Kathryn McEntee	Board Member	UNION	Creative Thought Expert
Caroline Lease Walker	President of the Board	UNION	Early Childhood Educator and Small Business Owner

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

1. *A description of 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.*

It is the board's responsibility to uphold the statement of mission and purpose that articulates the organization's goals, means, and primary community served. The board will select the Principal through a stringent hiring process based upon experience, shared goals, managerial abilities and have a temporary period established. The board must reach consensus on the Principal's responsibilities and undertake a careful search to find the most qualified individual for the position. The board will support and evaluate the principal. The board should ensure that the principal has the moral and professional support he or she needs to further the goals of the school. The board will ensure effective planning to maintain proper functionality and plan for future expansion. The board will actively participate in the overall planning process and assist in implementing and monitoring the plan's goals. The board will monitor, and strengthen programs and services for students through effective observation and commitment to quality and creativity. The board will ensure adequate financial resources. One of the board's foremost responsibilities is to secure adequate resources for the organization to fulfill its mission. The board will protect assets and provide proper financial oversight. The board must assist in developing the annual budget and ensuring that proper financial controls are in place. The board will build a competent board. The board has a responsibility to articulate prerequisites for candidates, orient new members, and periodically and comprehensively evaluate their own performance. The board will ensure legal and ethical integrity. The board is ultimately responsible for adherence to legal standards and ethical norms. The board will enhance the organization's public standing. The board should clearly articulate the organization's mission, accomplishments, and goals to the public and garner support from the community.

2. *Describe the size, current and desired composition, powers, and duties of the governing board. Identify key skills, areas of expertise, and constituencies that will be represented on the governing board. Explain how this governance structure and composition will help ensure that*

a) the school will be an educational and operational success; b) the board will evaluate the success of the school and school leader; and c) there will be active and effective representation of key stakeholders, including parents.

The current size of Ballancrest's Board of Directors is seven with a desired number being between 7 and 10 board members. The composition of this board was by design of our founder. This board is comprised of individuals with a passion for education and various needed skills. The board is comprised of two educators, two business owners and experts, one expert in the creative process who spent her career working with Fortune 100 companies, one payroll and bookkeeping specialist, a marketing expert and an financial services compliance officer. These key skills in gifted education, business, human resources, finances, marketing and legal matters come together to make a passionate and highly skilled board to launch Ballancrest in the fall of 2014. The board has positions including president, vice president, secretary, financial officer and curriculum/performance supervisor. These skills and expertise coupled with the passion of the board members will ensure success and supervise academic and operational performance. This board will also be choosing the principal of the school to assist with its success. The strong team of the board of directors, the highly experienced and passionate principal and parent organizations and volunteers will all work together and be vital pieces to the organizational structure of Ballancrest.

3. 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?

The founding board members were recruited by the founder for specific reasons. The founder met each of them through either personal or business dealings and respected them for both their skills and passion for education. Caroline Walker and Julie Lease founded this together with Caroline being a business and marketing expert and Julie an educator with a Masters in Gifted Education. Caroline then asked Dandan Liu, college professor at the University of North Carolina at Pembroke and Mass Communications expert to join. Dandan is a parent and advocate for much needed gifted education programs. Anthony Vigliotti was then asked by the founder as he has worked in the financial industry for 17 years and brings great knowledge and prior experience with compliance. Sarah K. Whitmore is an educator with a passion for innovation and was asked to bring a modern twist to the education team on our board. Heather Sorsby is an accounting professional and parent with a deep passion for education who the founder met several years ago, at that time she expressed her desire to assist should the founder ever decide to pursue a charter school. A mutual friend introduced the founder to Kathrine McEntee who had implemented some of her own creative curriculum in a public school in another state, she was extremely excited about Ballancrest's proposed program and her own educational views lined up with that of the current board members. She was therefore asked to join the board as well. This board is made up of dedicated and passionate individuals with a plethora of necessary skills that can be applied to the successful launch and operations of our charter school. Each member is dedicated and passionate about the school's vision, mission and goals.

4. How often will the board meet?

Meetings will be held twice a month, with possible summer months limited to one.

5. 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 (Board Policies Draft: Appendix H).

Board members will have a meeting dedicated specifically to their training. There will be a review of the procedures in meetings, what we cover in meetings, the bylaws, our duties, our responsibilities and the member will then be sworn in under our strict code of conduct. The member will then be taken on a full tour of the school's operations with the President of the Board to meet each staff member and supervise the operations of the facility. Each of the next several meetings the new board member will be responsible for observing a different board position. This will give the new board member the starting tools to begin to function, learn and grow on the board. In addition, the board will also be assessed by the principal, teaching staff and the parent organization each year so that they are aware on any areas in which they need improvement. These areas will be addressed and there will be two full training days each year in the month of May for the members of the board. This board retreat in May will seek to train the board in any areas in which they may be lacking. The board will have the opportunity to look at its effectiveness, the school's operations and plan the training that would be most valuable at that time. The board members will always have a focused training regarding the budget and fiscal responsibility as this is the area that is most crippling to charter schools.

6. 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.

There is one relationship on the board that maybe perceived as being a conflict of interest. Two board members are related. Caroline Walker is Julie Lease's daughter. They have worked together to improve education for years and are passionate about what they are doing. There is no conflict of interests, however, there may be one perceived. Therefore, there is a very specific conflict of interest policy included in Ballancrest's bylaws as well as its board policies and meetings of the board, all votes and all policy discussions will be open to the public. In addition, should this perceived conflict of interest be a problem one of these members will resign their post and volunteer in other ways.

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

A best-practices approach will be taken to develop any school policies. Committees, in conjunction with the administration will examine existing policies of successful schools, adapt those policies to conform to the needs of Ballancrest and recommend the policies to the board for deliberation and action. Parents will be included on policy development committees, particularly in instances where policies under consideration would directly affect the students and/or parents.

Policies will be voted in by a majority vote of the board. These policies will then be distributed and go into effect on the date decided by the board.

The board will also rely heavily on the experience of its members when developing board policies. There are several board members with relevant experience and expertise that have offered their insight when drafting policies.

8. *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.*

Ballancrest will have a Parent/Teacher/Student Organization that will meet regularly to discuss any areas of interest or any areas that need improvement.

The goals of the PTSA include:

- Regular, two-way, meaningful communication between home and school.
- Promotion and support of parenting skills.
- Active parent participation in student learning.
- Parents and teachers as welcome volunteer partners in schools.
- Parents as full partners in school decisions that affect children and families.
- Outreach to the community for resources to strengthen Ballancrest.

The Parent/Teacher/Student Association will report to the board at one of the board's monthly meetings.

There will also be a Fundraising Committee formed of Parent Volunteers that will be supervised by the Principal and a selected board member and will report to the board at one of the board's monthly meetings.

The goals of the Fundraising Committee will include:

Solicit contributions from the community which will be placed in an endowment for Ballancrest improvements. In addition, there will be an annual Donor Drive fundraising effort. Through presentations and speeches to organizations, mailings to all segments of the community, media publicity, and one-on-one contacts, solicitations should continue year around. The chairman appoints a secretary and heads of the sub-committees. The sub-committee chairman will recruit from the parent community.

Fundraising activities are carried out by the committee whose chairman is an appointed or elected member of the executive board.

The major responsibility of the fundraising committee is to raise the amount needed to meet the proposed unit budget and to work cooperatively with the board president and treasurer in accounting for receipts and disbursements for the activity. The committee may also plan specific fundraising events and activities.

Committee Procedures:

Fundraising events must be approved in advance by the executive board. Approval should be recorded in the minutes. The committee will recruit enough volunteers to conduct the project. Assign each volunteer specific tasks and develop a work schedule. Solicit donated goods and services. Clear the dates with the school and reserve needed facilities and equipment.

There will also be a Parent Event Committee which will be run by parent volunteers and supported by the administration. This committee will report its activities to the board every other month. This committee will be responsible for planning school wide events, clubs, extra curricular activities and recruiting and training the parent volunteers for all planned

events.

Governance and Organizational Structure of Private Non-Profit Organization (continued)

Include in the Appendices:

- 9. 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).
- 10. A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix E).
- 11. 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 (Appendix F).
- 12. A copy of the articles of incorporation, if available. If not available, this document must be available prior to interview by SBE, the applicant must demonstrate that it has been applied for prior to submission of the proposed application. (Appendix G)
- 13. Copy of any board policies if adopted already (Appendix H).
- 14. Copies of meeting minutes (if available), relevant to the development of the charter school plan, during the application process (Appendix I).

Proposed Management Organization (Educational Management Organization or Charter Management Organization)

If the proposed school does not intend to contract with an education service provider, mark "Not Applicable" and follow the direction #3 in the Application Specifications.

X Not Applicable

Private School Conversions: complete ONLY if the proposed charter is a private school conversion.

Otherwise, mark "Not Applicable" and follow the direction #3 in the Application Specifications.

X Not Applicable

Applicable" and follow the direction #3 in the Application Specifications. Understand that the replication means that a new charter school will be governed separately from the charter school the application is modeled after.

X Not Applicable

Projected Staff:

Provide, as Appendix K, a list of positions anticipated for the charter school; (e.g., principal or director; finance officer, administrative support staff; teachers (part-time and full-time); paraprofessionals/teaching assistants, clerical, and maintenance.). Be mindful that your predicted administration and staff match the projected enrollment noted in Section I and align with the proposed budget.

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

- 1. *Explain the board's strategy for recruiting and retaining high-performing teachers.*

The board plans to recruit and retain quality teachers by appealing to their love of teaching. We want to focus on attaining and retaining those who love to teach and value these benefits:

- Teachers will be given the opportunity to be creative with the curriculum
- Teachers will have smaller class sizes and be able to offer more attention to each student
- Teachers will have the chance to work in a positive and supportive school

in which they have a stake and a say in its direction

-Teachers will have an opportunity to work with other professionals at their level in team activities to improve and try new teaching techniques

In addition, the board will implement the following strategies to recruit the finest teachers:

Partnering with institutions of higher learning

Supporting our paraeducators in their pursuit of higher learning

Recruit a diverse teaching staff

Support new learning and advancements especially in science and mathematics

Improved working conditions through frequent teacher satisfaction surveys

Recruit and develop administrators who can draw on the expertise of specially-prepared teacher leaders.

- 2. Provide a description of the relationship that will exist between the charter school employees and the nonprofit board. Provide as Appendix L, a draft of the employment policies to be implemented by the proposed charter school.*

The board will recruit, interview and hire every employee of Ballancrest. Each staff member will report directly to their supervisor as outlined on the organizational chart, however, the board will be responsible for the strength and competence of the teaching and support staff. In addition, the teachers are welcome to attend any board meeting with set aside time and address open issues that need to be addressed. The board will also be responsible for handling any serious behavior violation by a staff member and deciding upon the state of their employment. It is also the board's responsibility to handle any staff promotions or terminations.

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

Each applicant seeking to be employed by Ballancrest will complete an application, submit a resume and those seeking teaching positions will submit a short narrative regarding their theories about education. Once these are submitted the Principal will conduct a preliminary interview out of the board selected candidates and make recommendations to the board of potential candidates. Potential candidates will then be interviewed by the board at which time those applying for teaching positions will have to present and teach a sample lesson in their desired subject matter. The board will take all recommendations and experience into consideration and then vote to hire a candidate. If the board, by majority vote elects to hire an employee they are then given an offer and must complete a state and federal background check including fingerprints and sign an agreement to random drug testing.

If a staff member is reported to the board as having committed an serious infraction the Principal will report the employee to the board along with any supporting evidence. The employee will be placed under mandatory paid leave until the board can be assembled. The principal is responsible for being at the meeting to state the infraction and the employee will then be given the chance to explain/defend themselves. The board will weigh what has been presented and take a vote to determine whether the employee may be reinstated or is to be terminated.

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

The salary range for Ballancrest employees is as follows:

Principal: 55K-65K

Assistant Principal: 40K-50K

Office Assistant: 32K
Teachers: 35K-43.5K
Paraeducators: 22K-26K
Counselor: 40K-45K
Special Services Teacher: 35K-43.5K
Curriculum Coordinator: 40K-48K
Food Preparation Staff: 26K-28K
Janitorial Staff: 20K-22K
After School Teachers: \$5,400-\$6,250 (part time position)

Ballancrest will participate in the State of North Carolina's health plan. All full time employees (30+ hours per week) will be eligible for these benefits for themselves and their families as at 50/50 match. In addition, Ballancrest will offer its full time staff members a 401K plan.

5. Provide the procedures for employee grievance and/or termination.

If an employee has a grievance they will report directly to their supervisor as outlined in the organizational chart. If their grievance is with the supervisor, we encourage them to speak with the party to resolve the situation and if it cannot be resolved it should be brought directly to the board. Board meetings adhere to Open Meeting Laws and will have time set aside to assist with any issue brought forth by an employee, parent or student. All grievances will be documented and recorded, all privacy laws will be followed.

If a staff member is reported to the board as having committed an serious infraction the Principal will report the employee to the board along with any supporting evidence. The employee will be placed under mandatory paid leave until the board can be assembled. The principal is responsible for being at the meeting to state the infraction and the employee will then be given the chance to explain/defend themselves. The board will weigh what has been presented and take a vote to determine whether the employee may be reinstated or is to be terminated.

6. Identify any positions that will have dual responsibilities (within or without the organization) and the funding source for each position.

All teachers will work on a rotating basis to assist with the before school program from 7am-8am. In addition, the office assistant will be required to complete first aid and emergency training as well as training in diabetic procedures and medication administration. All staff will be trained in first aid and CPR, but the office assistant will assist with these functions in the office. This training will be paid for by Ballancrest and the funding to cover these expenses is accounted for in the school budget.

7. Describe the plans to have qualified staffing adequate for the anticipated special needs population, means for providing qualified staffing for ELL and gifted students.

The entire staff of Ballancrest will be specially trained to support our population of gifted students. To support those twice gifted students requiring additional support, a Special Services Teacher is accounted for in the budget and will be an expert in assisting these children with meeting their educational goals. There will also be training for every teacher on modification and implementation of the teaching methods described previously in order to properly craft a plan and teach our ELL students.

8. Provide a narrative detailing the roles and responsibilities, qualifications and appropriate licenses that each position must have to be hired by the non-profit organization and effectively perform the job function(s).

Principal:

The principal that the board selects for Ballancrest will oversee the day to day operations of the school and keep constant communication with the board, the staff, parents and students. The principal is responsible for:

- The implementation of the shared school vision
- The nurturing and sustaining of a culture and instructional program conducive to learning and staff development
- The ensuring of the management of school operations to produce a safe and effective learning environment
- The collaboration with families and the diverse communities schools serve
- The promotion of integrity, fairness, and ethical behavior
- The interaction with larger political, social, legal, and cultural contexts of schooling

Principal Qualifications include:

- Ed.D./Ph.D. in an educational field
- Appropriate License (or ability to apply)
- 10+ years experience in educational setting
- Administrative or supervisory experience
- Preferred experience with gifted children

Vice Principal:

The vice principal will support the principal in the supervision of the day to day operations of the school. In addition to supporting the principal, the vice principal will specifically oversee the office administration staff, the janitorial staff, the food preparation staff, maintain schedules for these employees and prepare and oversee budgets and supply requests for these areas to be submitted to the principal and board for approval. In addition the vice principal will:

- Oversee and assist with all student planned activities, events, clubs and extracurricular activities
- Supervise the before and afterschool program
- Sign off and assist with the scheduling of any facility use
- Supervise and insure proper office record keeping and submission to the proper entities

Qualifications for the vice principal:

- Masters degree or higher in educational field
- Appropriate License (or ability to apply)
- 5+ years experience in educational setting
- Administrative or supervisory experience
- Preferred experience with gifted children

Office Staff:

Office staff will be responsible for maintaining and ensuring confidentiality of student files and reporting student information to the proper sources. Office staff will also be responsible for tracking student attendance, assisting principal and vice principal in various ways when needed, maintaining security with parent pick up and visitors to the school, accepting and distributing deliveries and mail, maintaining health and safety requirements in regards to student safety, administration of medication and the coordination and implementation of the carpool system.

Qualifications for office staff include:

- 5+ years of administrative experience in an educational setting or similar setting

Familiarity with confidentiality and record reporting
Computer proficient, willing to train on new reporting systems
Organized, responsible and friendly with staff and parents

Food preparation staff:

This person is responsible for all menu creation, submitting order forms to the vice principal that are in line with the approved budget, maintaining health and safety requirements in the kitchen, preparation of breakfast selections, lunch and snack for afterschool program.

Qualifications:

3+ years of food preparation experience
Nutrition and healthy selections knowledge
Highly experienced with menu planning and budgeting
Commitment to quality and passion for serving healthy food to children
Must have recent Servsafe certification and be familiar with health department expectations and requirements

IT/Media Coordinator:

-Maintain, troubleshoot, supervise and implement all technology use within the school

Masters degree in an educational field preferred (or in progress)

Appropriate license (or ability to apply)

5+ years experience in educational setting

Demonstrated effectiveness as technology coordinator/educator

Special Services Teacher:

The special services teacher will be responsible for:

-Case manager to twice exceptional students

-Provide direct services as needed to twice exceptional students

-Review and print monthly online school snapshot of progress for each student and send to office for review and student file

-Hold monthly scheduled phone conference with families on caseload and their teacher

-Be available for families on an as-needed basis via phone and online

-Schedule IEPs, set up online meetings, and follow up on attendees

-Ensure all documents are in prior to IEP meeting (reports, teacher reports/goals, Parent progress, test scores) and forwarded to office for approval

-Mail all approved reports to parents one week before IEP

-Hold transition meetings

-Monitor confidential tracking database for returned IEPs

-Follow up with parental or teacher concerns

-Keep files in office compliant

-Update database with accommodations, dates, and other needed information

-Test students as necessary during state testing

-Attend all professional developments

-Follow up on concerns with teacher and/ or parent as noted on teacher monthly progress form

-Complete IEP Progress Reports for each student

Qualifications of the Special Services Teacher:

Degree in special education with experience with twice exceptional children, schooling in psychology preferred as well.

5+ years of experience with real application

Special Education Credential

Multiple Subject Credential (highly desirable)

Appropriate License

Familiarity with reporting standards, systems, databases and confidentiality requirements

School Counselor:

The school counselor will:

- Help students understand and overcome social or behavioral problems through individual and group counseling
- Provide individual and small group counseling based on student needs
- Work with students to develop skills such as organization, time management, and effective study habits
- Help students set academic and career goals and develop a plan to achieve them
- Evaluate students abilities and interests and offer special support often needed by gifted children
- Develop strategies with teachers, administrators, and parents to help students succeed
- Teach classes on topics such as bullying, drug abuse, and planning for college or careers after graduation
- Identify and report possible cases of neglect or abuse
- Refer students and parents to resources outside the school for additional support

Qualifications:

Masters degree in counseling

5+ years in an educational setting

Experience with gifted children and twice exceptional children and the related social and behavioral issues often seen

Teachers:

Classroom teachers will be responsible for:

- Following and administering the curriculum
- Reaching performance goals
- Regular student assessment
- Watching for academic or behavioral issues and alerting the proper staff
- Supporting students in all areas
- Testing to monitor progress
- Submitting assessments to the administration
- Participating and adding to shared professional development among staff
- Mentoring students on projects

Qualifications:

Bachelors in education (or special field if teaching special subjects)

Masters preferred

3+ years in an educational setting

Proven proficiency in implementing teaching methods

Para Educators:

Para Educators will be responsible for rotating as needed to assist the primary classroom teachers with what is needed in each classroom. These educators will also be responsible for serving as substitutes when needed.

Qualifications:

Associates degree or higher, or current student
2+ years of experience with children
Prepared to complete ongoing professional development

Staff Evaluation and Professional Development

1. *Identify the positions responsible for maintaining teacher licensure requirements and professional development.*

Ballancrest will adhere to the 75% rule, all teachers having or willing to obtain licensure unless they are hired for a rare expertise. In addition, all staff at Ballancrest, except janitorial, will be required to complete professional development.

2. *Provide a detailed plan noting how the school will mentor, retain, and evaluate staff in a format that matches the school's mission, educational program, and meet the teacher certification and licensure requirements for teachers as prescribed by state law and No Child Left Behind. Be sure this overview matches with the projected staff and funding of the proposed budget section.*

At Ballancrest, staff will be taught much the same way that we want to teach our students. Ballancrest will follow the state law with over 75% of its teachers holding licensure with this percentage anticipated to be much higher. In addition, all staff will complete the ongoing training requirements to adhere to the regulations set forth in NCLB. This aligns directly with our goal of offering new teaching opportunities, promoting teamwork and encouraging creativity and innovation in teaching. Teachers at Ballancrest will have ongoing training and support throughout the year on teacher work days and prior to the beginning of classes in August. These trainings will be on an individual basis for those that are seen to have an area that needs to be addressed, in a large group setting for trainings a large number of staff need and then we will also have peer grouping where groups of teachers will meet together and discuss what has worked and idea share. Teachers will be assessed on a twice a year basis by the principal with the results of these assessments reported to the board. These assessments will include general job performance, teaching ability, student progress and teacher's growth. The teacher will also complete a self-assessment which will be reviewed along with the principal's assessment and then the teacher and principal will set individual goals for each teacher to work on in that period. Each new assessment will review the prior goals for achievement. Teachers will also be responsible for completing an anonymous teacher satisfaction survey which will also go to the board along with the teacher assessments and self assessments. The board will then have the ability to look at how the principal views each staff member, how the staff member views themselves, goals for improvement, frequency of achieving these goal and overall staff satisfaction. Armed with these tools the board will be able to make decisions regarding staffing and adjusting any needed areas to ensure teacher satisfaction and retention.

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

Summative assessments:

- Mandatory comprehensive accountability measures
- Training designed to provide valid, reliable and fair measures of teachers progress toward and attainment of knowledge, and skills
- Capitalize on the strengths of each teacher and utilize those strengths in peer training

Interim assessments:

- Comprehensive and content-cluster measures that assist administration in constant monitoring
- Self-assessments and performance tasks, administered at strategically determined intervals throughout the school year;
- Results reported on the same scale as the summative assessment to provide information about how teachers are progressing;
- Serve as the source for interpretive guides for the board
- Involve a large teacher role in developing and scoring constructed response items and performance tasks;
- Afford teachers and administrators the flexibility to:
 1. select item sets that provide deep, focused measurement of each individual teacher's goals
 2. administer these assessments at strategic points in the instructional year.

All assessments will be conducted internally and professional development opportunities will be conducted both internally and externally throughout the year.

Each of these core components will support our teachers and help them to grow and expand their teaching tools. It is only through this constant improvement and support that teachers will continue to grow, be challenged, maintain their excitement for teaching and continue their creativity. Teachers who are always growing, progressing, sharing ideas and striving to reach their individual goals will only continue to improve in their effectiveness when implementing the educational plan for the school.

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

The schedule for training and professional development prior to Ballancrest Opening will be as follows:

Training will begin two weeks prior to school starting.

Training week one, (two weeks prior to opening)

Presentation of Ballancrest's mission, vision, goals, future planning and educational theory

Introductions and activities to make the staff more comfortable, team building activities that follow the curriculum and require the teachers to work together and be creative. These activities and the way they will be taught by the curriculum coordinator will serve as examples for the curriculum implementation.

- Presentation of the curriculum outline
- Introduction of the staff development plan, timeline, self-assessments
- Presentation of basic operations information, policies and procedures, safety, emergencies, accountability, schedules, calendar, benefits and open discussion and question period
- Review of student assessments, timeline and reporting responsibilities
- Presentation by the Special Services Teacher regarding services, methods, working with twice-exceptional children and training on what to watch for through everyday observation and on assessments

- Presentation by the curriculum coordinator to introduce creative teaching methods and explain the flexible ability grouping component of the educational plan
- Technology presentation with a review of the technology and resources available to the staff.

Week two of training, (week prior to opening)

- Teachers will review their materials and be placed into peer groups for planning and team building
- Curriculum coordinator will circulate and work with each teacher individually while reviewing lesson plans
- Teachers will have the opportunity to complete their classrooms and receive paperwork on their students
- Teachers will have individual planning time with access to the administration, curriculum coordinator and peers to assist if needed

5. 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.

Teachers are expected to complete 60 hours of professional development yearly. Thirty hours of this time will be completed each year in the week prior to school opening with the remaining hours taking place on teacher work days throughout the year. If a staff member would like to go to an external training on a different day, they will submit a request to the office who will then schedule staff to ensure the teacher's ability to attend the training. Teachers attending external professional development are required to submit a request at least two weeks prior to the training and return documentation once the training is completed to be kept in the employee's file. In addition, teachers may request to take administration approved online training. Teachers may also request approval for an online training they would like to complete. The school's schedule more than accounts for the required professional development hours with the number of teacher work days built into the schedule and the utilization of the week prior to school beginning.

Enrollment and Marketing:

Reaching the full capacity for enrollment will be critical to obtain the necessary financial resources to keep your school viable and operating efficiently. In addition, it is required by law that charter schools provide equal access to all students. Read the charter school state statute regarding admissions GS 115C.238.29F(g) (1-7) carefully.

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 reflects 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-238.29F(g)(5)).

Ballancrest is blessed with having marketing expertise and experience with building a student population on its board. This equips the organization with the knowledge of what works and what does not, effective ways of reaching out into the community and experience with building and sustaining relationships with students and parents. Ballancrest will utilize effective and low cost methods of marketing its offerings to the targeted population

as outlined below. A twice a year SWOT analysis will also be performed by the marketing chair and presented to the board to monitor the success of the marketing efforts. All design of promotional materials will be done internally by the board member with design experience. This will include the maintenance and upkeep of the website and performance of all social media efforts. The marketing activities to be performed as well as the timeline are stated below. All efforts are accounted for in the marketing budget.

Marketing Activities:

Community Outreach, Community Outreach will begin right away and then pick up in July. This means appearing at town council meetings, community events, visiting local businesses, preschools and churches and talking to those in the community. This will accomplish the goal of beginning the much coveted successful word-of-mouth campaign.

Ballancrest has already met with the mayors of Weddington, Waxhaw and Wesley Chapel, has spoken at the Wesley Chapel Town Council, was featured in South Charlotte Weekly and Union County Weekly and has contacted Governor Pat McCrory and Representative Robert Pittenger.

Parent Information Nights, Parent information nights will begin in September and there will be at least one, often two nights per month. These nights will be held at a local church, highly publicized and will have presentations explaining our program, our offerings, distributing admissions material and answering any questions.

Subdivision Publications: Most of the area neighborhoods have a newsletter. We plan to reach out to each community and attempt to put in a story about our program for the residents. Often this is more cost effective and successful than larger publications.

EDDM: The United States Postal Service started a less expensive mass mailing system a few years ago that we plan to utilize to let the residents of our target area know a little about us. This will be a designed marketing piece that will go to every door within our target area. This will happen in October and January. These mailings will invite parents to our information nights and give a brief synopsis of our offerings.

Ballancrest will also utilize social media networks, parent websites, write an education blog monthly and maintain a firm grasp on its online image and marketing efforts.

Ballancrest will also regularly issue press releases with media worthy information. Caroline Walker has already had articles picked up in three different publications locally as well as authoring a guest educational writer article.

Parent and Community Involvement

1. *Describe how you will communicate with and engage parents and community members from the time that the school is approved through opening.*
2. *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.

Ballancrest will begin marketing and building a community as soon the organization receives its preliminary charter. Parent involvement is an essential part of the school's operations. Parents will become involved in the school's mission through the initial contact of the marketing efforts. Several parent information nights will be held in the fall to introduce the school, its mission, vision, educational plan and admissions procedure. The board members will support parents through the admissions process and maintain constant contact with parents and answering any inquiries quickly. Once the board conducts the public lottery and the first student body is selected, parent communication and the building of a parent community will begin. It is a requirement of our program that each family donate 50 hours per year to the school. Following the lottery there will be parent meetings to review what is needed. Parents will have an opportunity to serve on a committee, assist with fundraising, assist with a club or extracurricular activity, sign up to assist with school setup prior to school opening or attend any one of six assistance weekends throughout the school year. These weekends will be designed to allow parents to help with any needed tasks around the school. For example, parents may help with teacher needed tasks, help paint, spread mulch on the playground, or assist with cleaning. Furthermore, parents may sign up to assist as a room parent. Any parent who is interested in serving as a room parent or assisting with an extracurricular activity where they will be with the children (supervised by a teacher) will need to complete a state and federal background check, fingerprints and drug screening. Bringing parents into the planning, setup and operation of the school will strengthen their commitment to the school and assist the school in meeting its goals. By engaging the parent community throughout the year parents will be more committed to the program and the students success with meeting their educational goals as well. In addition to these efforts Ballancrest will also have a PTSA that parents may become involved with. Parents will be welcome to attend any board meetings and will receive updates from the board as well as newsletters from the school regarding school business, progress, successes and needs. Parents will also have regular conferences with their child's teachers. When students feel as though their parents are invested in their education they feel supported and driven to achieve their educational goals and parents feel secure knowing how the school is functioning. Having a strong parent community and an exemplary reputation in the community in which it resides is of utmost importance to the founding board members of Ballancrest.

Admissions Policy

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

1. *Tentative dates for application period; enrollment deadlines and procedures.*
2. *Clear policies and procedures detailing the open enrollment lottery plan including policies regarding statutory permitted student enrollment preferences.*
3. *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 withdraws and transfers.*

Charter School Law

(5) A charter school shall not discriminate against any student on the basis of ethnicity, national origin, gender, or disability. Except as

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

Charter School Legislative Purposes

(5) Increasing learning opportunities for all students, with a special emphasis on at-risk or gifted students.

Above you will see the law regarding admissions to a charter school. It reads that it may not limit admissions to students bases upon intellectual ability or achievement unless set out in the charter and mission of the school. Ballancrest would like to request the use of the following admissions procedure in order to achieve the above legislative purpose of North Carolina Charter Schools. One of the six legislative purposes of a charter school is to reach the underserved population of gifted students. This is extremely difficult to do if you do not identify them. The admissions policy below was specifically crafted by a teacher with a Masters in Gifted Education, following all best practices, accounting for different forms of giftedness and using these measures will not exclude any twice-exceptional children. PLEASE SEE APPENDIX R REGARDING MODIFICATION OF THIS ADMISSIONS POLICY IF NEEDED.

Parent Information Nights will begin in the fall with the application window being from January 1st-March 31st. Ballancrest will provide a list of approved testers if parents wish to do this themselves, we will also offer several days where testing will be offered cost free to those students with financial need.

Admissions Procedure:

I. Rationale

- A. Use of best practices based on research
- B. Compliments philosophy and mission of school
- C. Implementable and not overly burdensome

II. Tools

- A. Renzulli Classification of Characteristics Scale for Teachers
- B. Torrance Test of Creative Thinking
- C. IQ test- WISC
- D. School performance or observation dependent on level

III. Procedure

- A. Contact from parents
- B. Meet with family
- C. Forms completed
- D. Testing

IV. Standards

Two of the following at or above the 85%

1. IQ
2. CQ
3. 3.0 GPA or positive observation
4. Teacher recommendation

Students will then be placed into the lottery, which will be held publicly the second week of March.

Permitted Student Enrollment Preferences: Ballancrest will specifically follow the permitted student enrollment preferences outlined in G.S. 115C-

238.29F regarding siblings, multiple birth siblings, children of administrators, teachers, assistant teachers and founding board members.

Waiting Lists: Once the lottery has filled the open spots the lottery will continue filling the spots on the wait list in the order of which the names are pulled. These students will then be contacted in order should a space for them open.

Withdrawals and transfers: If a student withdraws for any reason that student's records will be sent to the child's new school and the next student on the lottery selected wait list will be called and so on down the list.

If a student requests re-enrollment, they will be placed into the lottery for the next year.

PROJECTED ENROLLMENT 2014-15 through 2018-2019

IDENTIFY LEA FROM WHICH
STUDENTS WILL PROBABLY COME

LEA #1 Union County Public Schools
LEA #2 Charlotte-Mecklenburg
Schools
LEA #3

In the following tables, please list for each year and grade level, the numbers of students that the school reasonably expects to enroll. In addition, please indicate any plans to increase the grade levels offered by the school over time and be sure these figures match those on the initial cover page.

	2014-2015			2015-2016			2016-2017			2017-2018			2018-2019		
	LEA 900	LEA 600	LEA 000												
Kindergarten	34	20		34	20		45	27		45	27		45	27	
Grade 01	34	20		34	20		34	20		45	27		45	27	
Grade 02	34	20		34	20		34	20		34	20		45	27	
Grade 03	34	20		34	20		34	20		34	20		34	20	
Grade 04	34	20		34	20		34	20		34	20		34	20	
Grade 05	24	12		34	20		34	20		34	20		34	20	
Grade 06	0	0		30	12		34	20		34	20		34	20	
Grade 07	0	0		0	0		30	12		34	20		34	20	
Grade 08	0	0		0	0		0	0		34	20		34	20	
Grade 09	0	0		0	0		0	0		0	0		34	20	
	194	112		234	132		279	159		328	194		373	221	
	306			366			438			522			594		

Transportation Plan:

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

Union County has many areas that are rural and it is also believed that due to the unique nature of our program offerings students will come from a variety of surrounding areas. Ballancrest does not plan to offer bus services in the foreseeable future. Ballancrest, however, will offer both before and after school services with the before school opening at 7am and staffed on a rotating basis by the teaching staff. The after school program will run from 3:00pm-6pm to allow parents freedom with getting their child to and from classes. In addition, there will be an effort coordinated through our office staff and parent volunteers to set up a carpool system and additional support for those students who need assistance getting to and from school each day. Use of the carpool system will be encouraged for all parents as it supports our green focus.

In addition, Ballancrest reserves the right in year three of operation to begin bus services as the student population grows and Ballancrest can gauge the areas in which bus services are most needed. If this is implemented it will be accounted for in the budget.

School Lunch Plan:

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.

Health and lifestyle are areas in which Ballancrest wishes to give their students a base of knowledge. In addition, healthy full meals help children learn and focus better in school. Ballancrest's cafeteria will be open to all students between 7am and 8am each morning with healthy breakfast offerings available at cost. These will include items such as milk, juice, cereal, fresh fruit, bagels, etc. In addition, Ballancrest will offer a full nutritional lunch to its students daily. Ballancrest members have met with the mayor of Waxhaw and have planned to coordinate with the local government and the local farming community. This area has many farmers and we will help each other in offering healthy food and buying locally. Contracts will be made with local produce suppliers and food suppliers and Ballancrest will serve fresh fruits and vegetables and as many organic foods as possible. The cost for lunch will be \$3.00 per day.

Ballancrest will offer free and reduced lunch to all students who need it. No child will ever go hungry at Ballancrest.

Sample Week Menu:

Monday: White Zucchini Lasagna, Peach Slices, Steamed Broccoli, Milk

Tuesday: Grilled Chicken Wraps, Pear Salad, Green Beans, Milk, Oatmeal Raisin Cookie

Wednesday: Turkey Subs, Chick Peas Casserole, Applesauce, Milk

Thursday: Cheese and Bean Burritos, Rice, Sweet Peas, Strawberries, Milk,

Fruit Juice Popsicles

Friday: Cheese Pizza, Spinach Salad, Mixed Fruit, Milk

Civil Liability and Insurance (GS 115C-238.29F(c)):

The Charter School shall obtain and maintain insurance at a minimum in the following amounts:

1. Errors and omissions: one million dollars (\$1,000,000) per claim;
2. General liability: one million dollars (\$1,000,000) per occurrence;
3. Boiler and machinery: the replacement cost of the building;
4. Real and personal property: the appraised value of the building and contents;
5. Fidelity bonds: no less than two hundred fifty thousand dollars (\$250,000) to cover employee dishonesty;
6. Automobile liability: one million dollars (\$1,000,000) per occurrence; and
7. Workers' compensation: as specified by Chapter 97 of the General Statutes.

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$1,000,000		\$4,891.00
Officers and Directors/Errors and Omissions	\$100,000		\$.00
Property Insurance	\$200,000		\$550.00
Motor Vehicle Liability	\$1,000,000		\$181.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other	\$1,000,000		\$7,578.00
Total Cost			\$13,532.00

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

Health and Safety Requirements:

All public charter schools are required to follow the regulations regarding health and safety as stated in § 115C238.29F (a).

We, the Board members at (Charter School Name) 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.

ballancrest 02/24/2013

(Board Chair Signature)

(Date)

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.

What is your plan to obtain a building? Identify the steps that the board will take to acquire a facility

and obtain the Educational Certificate of Occupancy. If a facility has been identified please fill out the Facility Form (Appendix N).

Ballancrest has been working since this past fall to identify and secure a building. We have located two possibilities.

Plan 1:

Our primary plan for the building is one that is already constructed, brand new and ready for upfit. It is 26,000 square feet with ample room to construct a small playground and parking available for staff. It is off of a major road with easy access to our target neighborhoods. We have a broker who is working on this for us and we are under a confidentiality agreement regarding the building. We would be able to obtain this building for less than market rates as the building is bank owned and we believe the owners would be willing to take the tax write off for the discounted rate. We have been working with John Shurley at Insight Architects who specializes in charter schools and is confident that the building would work well, be functional and be able to be modified in time to suit our purposes. In addition, the developer of this building is also building a large development about a half a mile down the road in the next few years and we would be able to build and expand for our upper grades.

Plan 2:

There is a large tract of land owned by a prominent politician and several investors in our target area that we have been in contact with to negotiate the donation of a 10 acre tract. We are working with local government and these owners to hopefully securing this tract of land and having the opportunity to build the green school we have been planning. After meeting with the mayor, this is the piece of land they would like us to be located on. In addition to working with John Shurley with Insight Architects we have also begun speaking with Hickory Construction and planning time frames should we have the opportunity to build. If we do build we would like to build a Monolithic Dome building. These buildings are completely green, energy efficient, cost effective, natural disaster proof and supported by FEMA as well as having a shorter construction time. Many school systems around the country are now building Monolithic Dome schools due to these attributes. If we begin moving forward once the charter is approved we should have our certificate of occupancy in time to open in August of 2014.

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.*

If neither of these plans can be followed through on in time there is a contingency plan. We have spoken with a local church that has a large educational building that is only used during bible study on Thursday mornings and on the weekends. We would have to get approval from the church council, but believe if we have a sound plan and rental amount we should be able to secure this building as a temporary location while we finalize our permanent plans. This building is large enough for our population and has the necessary attributes to receive the educational certificate of occupancy with very little work.

V. FINANCIAL PLAN

In the following sections present a detailed description of assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative should specifically address the degree to which the school budget will rely on variable income.

Budget: Revenue Projections from each LEA 2014-15

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

The formula for figuring these allotments can be found in the Resource Manual Finance Section.

See Charter School Dollars per ADM on the following link for per pupil allotments by county.

<http://dpi.state.nc.us/fbs/allotments/support/>

- All per pupil amounts are from the 2012-2013 year and would be approximations for 2014-2015.
- Federal funding is based upon the number of students enrolled who qualify. The applicant should use caution when relying on federal funding in year one to meet budgetary goals.
- These revenue projection figures do NOT guarantee the charter school would receive this amount of funding in 2014-2015. For local funding amounts, applicants will need to contact their local offices or LEA.

LEA #1900 - Union County Public Schools

Revenue	2012-2013 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2014-2015
State Funds	\$4,446.57	194	\$862,634.58
Local Funds	\$2,207.00	194	\$428,158.00
Federal EC Funds	\$3,743.48	19	\$71,126.12
Totals			\$1,361,918.70

LEA #2600 - Charlotte-Mecklenburg Schools

Revenue	2012-2013 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2014-2015
State Funds	\$4,438.40	112	\$497,100.80
Local Funds	\$2,332.48	112	\$261,237.76
Federal EC Funds	\$3,743.48	11	\$41,178.28
Totals			\$799,516.84

Total Budget: Revenue Projections 2014-15 through 2018-2019

INCOME: REVENUE PROJECTIONS	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019
-Exceptional Children Federal Funds	\$112,304	\$138,509	\$164,713	\$194,661	\$224,609
-Local Per Pupil Funds	\$689,396	\$821,565	\$983,104	\$1,171,754	\$1,337,832
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-State ADM Funds	\$1,359,735	\$1,626,610	\$1,950,966	\$2,315,388	\$2,648,692
-Working Capital*	\$0	\$0	\$0	\$0	\$0
TOTAL INCOME	\$2,161,435	\$2,586,684	\$3,098,783	\$3,681,803	\$4,211,133

***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 statements, etc., on the availability of these funds.**

Assurances are needed to guarantee these additional sources of revenue are available. Please include these as Appendix P.

Personnel Budget: Expenditure Projections 2014-15 through 2018-2019

This Personnel list may be amended to meet the needs of the charter school: This list should align with the projected staff located in the Operations Plan (Appendix K).

BUDGET EXPENDITURE PROJECTIONS Personnel	2014-2015			2015-2016			2016-2017			2017-2018			2018-2019		
	<i># Staff</i>	<i>Salary per</i>	<i>Total salary</i>	<i># Staff</i>	<i>Salary per</i>	<i>Total salary</i>	<i># Staff</i>	<i>Salary per</i>	<i>Total salary</i>	<i># Staff</i>	<i>Salary per</i>	<i>Total salary</i>	<i># Staff</i>	<i>Salary per</i>	<i>Total salary</i>
Personnel:															
Lead Administrator	1	\$55,000	\$55,000	1	\$65,000	\$65,000	1	\$65,000	\$65,000	1	\$65,000	\$65,000	1	\$65,000	\$65,000
Assistant Administrator	1	\$45,000	\$45,000	1	\$55,000	\$55,000	1	\$55,000	\$55,000	1	\$55,000	\$55,000	1	\$55,000	\$55,000
Core Content Teacher(s)	18	\$35,000	\$630,000	22	\$40,000	\$880,000	26	\$40,000	\$1,040,000	32	\$42,000	\$1,344,000	38	\$42,000	\$1,596,000
Para Educator(s)	4	\$26,000	\$104,000	4	\$26,000	\$104,000	4	\$28,000	\$112,000	6	\$28,000	\$168,000	6	\$28,000	\$168,000
Electives/Specialty Teacher(s)	4	\$35,000	\$140,000	6	\$40,000	\$240,000	8	\$40,000	\$320,000	10	\$42,000	\$420,000	10	\$42,000	\$420,000
Exceptional Children Teacher(s)	1	\$38,000	\$38,000	1	\$38,000	\$38,000	1	\$38,000	\$38,000	2	\$38,000	\$76,000	2	\$38,000	\$76,000
Food Service Staff	1	\$22,000	\$22,000	1	\$22,000	\$22,000	1	\$24,000	\$24,000	2	\$24,000	\$48,000	2	\$24,000	\$48,000
Counselor	1	\$38,000	\$38,000	1	\$38,000	\$38,000	1	\$40,000	\$40,000	1	\$40,000	\$40,000	1	\$42,500	\$42,500
It Professional	1	\$33,000	\$33,000	1	\$40,000	\$40,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000	1	\$45,000	\$45,000
Janitorial Staff	1	\$20,000	\$20,000	1	\$20,000	\$20,000	1	\$20,000	\$20,000	2	\$20,000	\$40,000	2	\$20,000	\$40,000
Office Assistant	1	\$28,000	\$28,000	1	\$30,000	\$30,000	1	\$30,000	\$30,000	2	\$30,000	\$60,000	2	\$32,500	\$65,000
Afterschool Staff	4	\$5,946	\$23,784	4	\$5,946	\$23,784	5	\$5,946	\$29,730	5	\$5,946	\$29,730	5	\$6,240	\$31,200
Curriculum Coordinator	1	\$40,000	\$40,000	1	\$43,500	\$43,500	1	\$43,500	\$43,500	1	\$45,000	\$45,000	1	\$45,000	\$45,000
Total Personnel	39	\$420,946	\$1,216,784	45	\$463,446	\$1,599,284	52	\$471,446	\$1,859,230	66	\$476,946	\$2,432,730	72	\$485,240	\$2,696,700
Benefits:															
401k Plan	29	\$1,600	\$46,400	32	\$1,600	\$51,200	38	\$1,600	\$60,800	50	\$1,600	\$80,000	53	\$1,600	\$84,800
Health Insurance	25	\$2,196	\$54,900	33	\$2,248	\$74,184	36	\$2,314	\$83,304	41	\$2,379	\$97,539	58	\$2,415	\$140,070
Medicare	39	\$452	\$17,628	45	\$459	\$20,655	52	\$486	\$25,272	66	\$467	\$30,822	72	\$482	\$34,704

Ballancrest Elementary

Social Security	39	\$1,934	\$75,426	45	\$1,963	\$88,335	52	\$2,080	\$108,160	66	\$1,998	\$131,868	72	\$2,061	\$148,392
Total Benefits	132	\$6,182	\$194,354	155	\$6,270	\$234,374	178	\$6,480	\$277,536	223	\$6,444	\$340,229	255	\$6,558	\$407,966
Total Personnel Budget	171	\$427,128	\$1,411,138	200	\$469,716	\$1,833,658	230	\$477,926	\$2,136,766	289	\$483,390	\$2,772,959	327	\$491,798	\$3,104,666

***Applicants may amend this table and the position titles to fit their Education and Operations Plans.**

Operations Budget: Expenditure Projections 2014-15 through 2018-2019

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		2014-2015	2015-2016	2016-2017	2017-2018	2018-2019
Books And Supplies	Testing, Map Assessments	\$5,202	\$6,222	\$7,446	\$8,874	\$10,132
Books and Supplies	Curriculum/Texts	\$29,890	\$14,600	\$15,674	\$16,890	\$18,214
	Instructional Materials	\$2,840	\$3,697	\$4,844	\$6,290	\$7,757
	Testing Supplies	\$7,840	\$8,211	\$8,640	\$8,888	\$9,120
Human Resources Costs	Legal Counsel	\$5,500	\$5,500	\$5,500	\$5,500	\$5,500
	Personnel Software	\$810	\$65	\$65	\$190	\$265
Other	Classroom Furnishings	\$75,000	\$25,000	\$25,000	\$25,000	\$25,000
	Food Plan	\$11,690	\$12,104	\$13,501	\$14,444	\$15,168
	Insurances	\$17,400	\$17,400	\$17,400	\$17,400	\$17,400
	Isis System Compliance	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000
	Marketing Plan	\$25,750	\$15,000	\$15,000	\$15,000	\$15,000
	Under Budgeted Expenses	\$8,953	\$16,465	\$12,322	\$12,386	\$12,346
	Yearly Auditing Lb&A	\$8,250	\$8,250	\$8,250	\$8,250	\$8,250
Rents and Debt Services	Custodial Supplies	\$13,125	\$13,125	\$13,125	\$13,125	\$13,125
	Extermination	\$3,200	\$3,200	\$3,200	\$3,200	\$3,200
	Facility Lease/Mortgage	\$178,704	\$213,744	\$255,792	\$304,848	\$348,064
	Maintenance	\$6,700	\$6,700	\$6,700	\$6,700	\$6,700
	Rent of Equipment	\$22,400	\$28,690	\$28,690	\$28,690	\$28,690
	Security/Alarm	\$775	\$576	\$576	\$576	\$576
Technology Hardware	Instructional Software	\$11,200	\$12,000	\$12,500	\$12,500	\$12,500
	Network/Internet	\$6,104	\$4,104	\$4,104	\$4,104	\$4,104
	Office Software	\$2,350	\$1,150	\$1,150	\$1,150	\$1,150
	Student And Staff Computers	\$34,894	\$21,000	\$24,750	\$25,430	\$26,741
Utilities	Energy	\$37,600	\$38,000	\$45,000	\$60,500	\$60,500
	Phone	\$13,312	\$13,312	\$13,312	\$13,312	\$13,312
Total Operations		\$547,489	\$506,115	\$560,541	\$631,247	\$680,814

***Applicants may amend this table and the position titles to fit their Education and Operations Plans.**

Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2014-2015	2014-2015	2015-2016	2016-2017	2017-2018
TOTAL EXPENDITURES (PERSONNEL)	\$1,411,138	\$1,833,658	\$2,136,766	\$2,772,959	\$3,104,666
TOTAL EXPENDITURE (OPERATIONS)	\$547,489	\$506,115	\$560,541	\$631,247	\$680,814
TOTAL EXPENDITURES	\$1,958,627	\$2,339,773	\$2,697,307	\$3,404,206	\$3,785,480
TOTAL REVENUE	\$2,161,435	\$2,586,684	\$3,098,783	\$3,681,803	\$4,211,133
ANNUAL NET PROJECTIONS	\$202,808	\$246,911	\$401,476	\$277,597	\$425,653

Budget Narrative: (No more than one and a half pages)

Please include additional information that showcases all assumptions for your budgetary calculations.

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

The total budget revenue projections were calculated using the best assumptions possible. The location we are seeking is in Union County very close to the Mecklenburg County line. We do believe that we will have a portion of the student population coming from Mecklenburg. We calculated our total revenue assuming 70% of the student population will reside in Union County and 30% will reside in Mecklenburg. We used a percentage of 10% of the student population to calculate the exceptional children amount.

Should our expected enrollment be lower than anticipated we have identified an enrollment of 217 to be necessary in order to break even for the first year of operations. This is with some changes to the staffing and supplies budgets.

We calculated our budget using conservative numbers, research and quotes.

Ballancrest sought assistance with the average cost per square foot in the area, as well as cost of upfits to the building from our architect.

We received estimates for furnishings and supplies, we plan to use School Specialty with a cost of \$2,000-\$4,000 per classroom for furnishings the first year.

Apple quoted us for student computers and software.

The NC Charter Association and LB&A estimated the cost of ISIS input and auditing.

Cost for testing and MAP assessment was obtained as an estimate from Northwestern Evaluation Association.

Estimates for all utilities were received from Union County Power Cooperative and city water supplier.

Estimates for phones and internet service along with recommended bandwidth were received from AT&T.

Cost of textbooks, electronic as well as curriculum supplies were researched

from several sources to come up with a realistic estimate.

Ballancrest also has obtained recommendations for extermination, security and fire system monitoring and inspection.

This budget was also created by members of the board who have financial experience and business management experience.

The breakeven numbers were calculated by holding the fixed costs and adjusting staffing and variable costs to the amount needed per student.

- 2. Describe the systems and processes by which the school will manage accounting, purchasing, payroll, and audits. Specify any administrative services expected to be contracted for the school, and describe the criteria and procedures for the selection of contractors*

Ballancrest will contract for accounting services and will find a recommended CPA who has worked previously with charter schools to assist with the financial documents and bookkeeping. We have received quotes for both assistance with the ISIS system as well as a quote from LB&A for our yearly auditing expenses. Purchasing and basic bookkeeping will be handled internally. Payroll services will be contracted as well. Ballancrest will interview companies, ask for references and look at the level of experience and customer satisfaction before selecting a professional to assist with services. We are seeking companies with previous experience with charter schools.

We selected companies to receive quotes from by asking for references from currently operating charter schools. The process for selecting any company to complete services for us will be speaking directly with a representative to ask basic questions. We will then ask for quotes and references followed by attendance of the company at a board meeting to give the board an opportunity to ask questions and vote on the selection of a firm.

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

Ballancrest aims to have a contingency reserve of just over 10% per year worked into the budget. Having two small business owners on the board we know that there are always things that you did not account for that must be taken care of and that this reserve for unbudgeted expenditures is necessary.

Ballancrest's personnel budget will build a staff with the necessary skills to meet all of our course offerings and educational objectives. The selection of this staffing structure was also planned to directly align with our goals and mission. Ballancrest's staffing budget includes experienced teachers, paraeducators to offer support, a counselor, a special services teacher and an IT professional along with special classes teachers. Each one of these positions will assist Ballancrest in living up to each ideal outlined in this application

Ballancrest will operate using sound fiscal practices including but not limited to:

Bookkeeping Practices Ballancrest must establish and maintain separate

accounting and related records for funds received through each source and budget. Accounting records must be established and maintained in accordance with generally accepted accounting procedures and must be updated to permit the timely and accurate preparation of financial statements and examination by auditors. All transactions will be entered into the ISIS system.

-Planning Policy . The planning system for Ballancrest will continue as a dynamic process, which is synchronized with the capital improvement program, capital budget and operating budget. The school's land use and expansion plans shall not be allowed to become static.

-Annual Budget Plans . Annual budgets shall continue to show fiscal restraint. Annual budgets will be balanced between projected total funds available and total disbursements including established reserves.

-A managed reserve shall be maintained in the General Fund at a level sufficient to provide for temporary financing of critical unforeseen disbursements of a catastrophic emergency nature. The reserve will be maintained at a level of not less than two percent of total Combined General Fund disbursements in any given fiscal year.

-Budgetary adjustments which propose to use available general funds identified at quarterly reviews should be minimized to address only critical issues. The use of non-recurring funds should only be directed to capital expenditures to the extent possible.

-The budget shall include funds for cyclic and scheduled replacement or rehabilitation of equipment and other property in order to minimize disruption of budgetary planning from irregularly scheduled monetary demands.

-Cash Balances. It is imperative that positive cash balances exist in the General Fund at the end of each fiscal year.

-Debt Ratios, less than 3%

4. *Indicate the amount and sources of funds, property or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which are secured and which are anticipated, and include evidence of commitment for any funds on which the school's core operation depends.*

Ballancrest does not currently have any secured funding, but does anticipate participating in fundraising activities as well as has been speaking with banks and several funding sources if Ballancrest begins constructing facilities. If Ballancrest leases the building described in the facilities portion of the application, upfits can be negotiated with the lessor to prepare the building for occupancy.

5. *Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated. What is the school's break-even student enrollment figure for each of the first five years?*

Ballancrest will adjust staffing plans, supplies, technology and administration budgets should the amount of revenue coming in in the first five years be insufficient to meet our needs. Ballancrest will operate with

fiscal responsibility and has determined the following break-even figures:

Year 1-217

Year 2-246

Year 3-258

Year 4-269

Year 5-299

6. *Year one cash flow contingency, in the event that revenue projections are not met in advance of opening.*

Ballancrest will adjust staffing plans, supplies, technology and administration budgets should the amount of revenue coming in in the first year be insufficient to meet our needs. Ballancrest will operate with fiscal responsibility.

Financial Audits: (No more than a half of a page)

Describe the procedure and method for conducting an independent financial audit for the proposed charter school.

Governing Boards Responsibilities:

- Select the auditor in keeping with the schools procurement policy and state charter school regulations;
- Assure that the audit is conducted and submitted in compliance with federal requirements and state requirements for charter schools;
- Assure adequate communication between the auditor and the board;
- Assure that management resolves audit findings as promptly as is feasible.

Goals for the Independent Financial Audit:

- Complies with the school's procurement policy and requirements specified in charter school law;
- Is arranged, conducted, and submitted in a timely manner;
- Results in an "unqualified "conclusion with no material findings, questioned costs, reportable conditions, or material weaknesses;
- Findings are addressed in a written, board approved corrective action plan prepared by management;
- There are no repeat findings from the prior fiscal year audit;
- The board is fully informed about the audit and meets with the auditor to discuss the audit report.

Provide the name and contact information of the firm approved by the NC Local Government

Commission (LGC) that will conduct the audit. If a firm has yet to be identified please list the firms the board has investigated.

The firm that will conduct Ballancrest's financial audits is:

LB&A Certified Public Accountants:

212 W. Matthews St. Suite 102, Matthews, NC 28105

1801 Stanley Road Suite 220. Greensboro, NC 27407

Phone: 704.841.1120 Fax: 704.841.4901

VI. AGREEMENT PAGE

LEA Impact Statement:

Pursuant to G.S. 115C-238.29B(d), the charter school applicant must submit a copy of the application to the LEA in which the school will be located. The applicant must submit their application to the LEA within **seven (7) days** from the due date so that proof of submission can be included in the complete application packet. The LEA may then submit information or comment directly to the Office of Charter Schools for consideration by the State Board of Education.

Applicant Signature:

The foregoing application is submitted on behalf of Ballancrest Elementary (*name of non-profit corporation or individuals submitting application*). The undersigned has read the application and hereby declares that the information contained in it is true and 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.

Print/Type Name: ballancrest

Board Position: President of the Board of Directors

Signature: _____

Date: 02/26/2013

Sworn to and subscribed before me this
_____ day of _____, 20____.

Notary Public

Official Seal

My commission expires: _____, 20____.