



NORTH CAROLINA CHARTER SCHOOL APPLICATION

Heritage Collegiate Leadership Academy

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: Heritage Collegiate Leadership Academy

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

Name of non-profit organization under which charter will be organized or operated: *Heritage Collegiate Leadership Academy*

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: *Kashi Nelson*

Title/Relationship to nonprofit: *Founding Director*

Mailing address: 1042 NC 305
Aulander NC 27805

Primary telephone: 919-906-9242 Alternative telephone: 919-878-6681

E-Mail address: *kbnelson08@aol.com*

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

County: BERTIE

LEA: 080-Bertie County Schools

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

No: X

Yes:

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

No: X

Yes:

What is the name of the nonprofit organization that governs this charter school? *Heritage Collegiate Leadership Academy*

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2014 Month August

Will this school operate on a year round schedule?

No: X

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	240
Second Year	K,01,02,03,04	300
Third Year	K,01,02,03,04,05	360

Fourth Year	K,01,02,03,04,05,06	420
Fifth Year	K,01,02,03,04,05,06,07	480
Sixth Year	K,01,02,03,04,05,06,07,08	540
Seventh Year	K,01,02,03,04,05,06,07,08	540
Eight Year	K,01,02,03,04,05,06,07,08	540
Ninth Year	K,01,02,03,04,05,06,07,08	540
Tenth Year	K,01,02,03,04,05,06,07,08	540

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.

heritagecollegiate

Signature

heritagecollegiate

Printed Name

Kashi Nelson, Lead Applicant

Title

02/28/2013

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:

Heritage Collegiate Leadership Academy of Bertie County ("Heritage Collegiate") is committed to the cultivation of powerful, versatile, and motivated learners empowered to become college-educated leaders whose contributions to the world inspire greatness in themselves and others through virtue, wisdom, courage and intellectual rigor.

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.*

Heritage Collegiate will target the students and families in Bertie County who seek a viable option for their children's public education. Heritage Collegiate is being established to meet the needs of the Bertie County families who seek a more rigorous public education for their children.

According to Bertie County's website, the demographics of the people residing in Bertie County are as follows: 62.34 Black or African American, 36.30% White, 0.44% Native American, 0.11% Asian, 0.01 Pacific Islander, 0.33% from other races, 0.48 from two or more races, and 0.99% Hispanic or Latino of any race. The demographics in the Bertie County Schools System reflect similar demographics although the Black/African American population reflects a much higher percentage (approximately 86 percent based on 2008-09 NCES data from Bertie County Schools' website) and the white population reflects a much lower percentage (approximately 11 percent). According to the 2011-12 NC Report Card data, 77% of all Bertie County's public school students receive free/reduce lunch. Heritage Collegiate anticipates that its students will reflect the similar racial, ethnic, and economic compositions as the people in the county and the students in Bertie County Schools.

The reason Bertie County was chosen as the location for this charter school is because the current educational system in the county provides no viable options for families who do not have the funds to pay for their children's education. Also, many who are working toward the Heritage Collegiate vision have direct or indirect connections with the families in Bertie County. Currently, there are two non-public educational options in the county--one is a K-12 private school and the other is a K-12 Christian school. There are no public charter schools within a commutable distance of most areas of Bertie County. Another reason to establish a charter school in the county

is to improve the overall student achievement in the county, especially in reading. According to NCDPI data for 2011-12, a much smaller percentage of Bertie County students demonstrated proficiency in reading at grades 3-8 (for instance at grade 3-47.4% for the district to 68.8% for the State) than at the state level. While Bertie County's student performance in mathematics was higher than the state in grades 7 and 8 for 2011-12, in grades 3-6, students performed below the state. Also in 2011-12, high school students in the county achieved an average SAT score of 1150 in reading, mathematics, and writing, while the average score at the State level was 1469. The assessment data overall clearly show that students in Bertie County are not being challenged and enrollment in college appears out of reach currently for many of the students who attend the traditional schools in the county.

At outreach meetings and other events, Bertie County families have shared their concerns about the lack of options and educational opportunities in the county. They provided anecdotal information on how currently their children are not receiving a quality education. Parents shared stories in which children received excellent grades in school yet when they went to college, they struggled and often dropped out because they did not feel sufficiently prepared to meet the rigorous academic challenges they faced in college. Parents also expressed concerns about the lack of equity and opportunities for some students to be able to access the few challenging programs in the county such as the AIG programs in elementary and middle schools and the STEM and Early College programs in high school. Also, families expressed concern about the safety of their children while at school because of the high level of gang recruitment and activity at most of the schools in the county. Families indicated they look forward to having the charter school in the county and will support efforts to make Heritage Collegiate a reality for their children.

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 projected enrollment of Heritage Collegiate Leadership Academy of Bertie County is 240 students (grades K-3) in 2014-15. The enrollment is expected to increase annually by approximately 60 students by adding a grade until enrollment caps at grade 8 in 2019-20 for a total of 540 students.

It is the expectation of the planning team and the governing board that there will be three classrooms of 20 students at each grade. It is also expected that three core teachers will be hired for each of the grades kindergarten to five. As the school grows to include middle school, additional staff will be hired to support the middle school operation. One floating teacher assistant will be assigned to each of the three early grades: kindergarten, grade one, and grade two.

Based on the data provided by Bertie County Schools in February 2013, it appears that the projected total enrollment of Heritage Collegiate for 2014-15 (240 students) represents approximately 9 percent of the current total K-12 student enrollment for Bertie County Schools which was reported by the superintendent's office on February 12, 2013 as approximately 2,650 students.

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

Heritage Collegiate is committed to meeting the needs of the whole child by addressing the educational, social, emotional, and behavioral needs of every child that attends the school. In addition to using the common core standards in English/Language Arts (ELA) and mathematics, and the essential standards in science and social studies as the basis for its curriculum framework, Heritage Collegiate will deliver instruction to its students using a variety of innovative methods and strategies that are typically not offered in Bertie County Schools. For instance, Heritage Collegiate will infuse Latin into its ELA classes at every grade in order to build the vocabulary of students and to help them in understanding the meaning of words which will improve their reading, writing, presentation, and test taking skills. In addition, Heritage Collegiate will provide life coaching sessions and Personalized Education Plans (PEPs) in which students will set individualized goals and individualized plans for intervention and instructional support necessary for students to be successful. Also, Academically and Intellectually Gifted (AIG) identification and programming will be offered at every grade.

In addition, Heritage Collegiate will provide instruction in foreign languages such as Spanish and Mandarin Chinese to all students using a variety of delivery methods that vary based on the grade level. Our school will provide a college-preparatory education based on the AVID model which focuses on developing students' skills in writing, inquiry, collaboration, organization, reading and critical thinking. Currently, the college preparatory experience in Bertie County is limited to a small percentage of the students at the high school level through the STEM and Early College high schools. Also, Heritage Collegiate will use a blended-learning rotational model that uses effective master teachers to deliver students' instruction in extended blocks of class time (for at least 90 minutes) in ELA and mathematics in an effort to improve student learning in these core areas. This practice blends traditional classroom delivery practices with the use of technology to ensure an effective level of individualized and differentiated instruction so that teachers are able to meet every student where they are in order to maximize each student's potential especially in the core subjects. Students performing at a higher grade level will be encouraged to work in small groups at times during the day at the higher grade level.

Heritage Collegiate will require students to develop projects as a component of its project-based and service-based learning models to enhance students skills in writing, research, project development and in making presentations on a variety of topics. Also, Heritage Collegiate will provide character development training based on the Wooden's Pyramid of Success model in which students are taught the behaviors and characteristics of successful people. The culture and climate at Heritage Collegiate promise a safe and orderly environment that is gang-free and espouses a "no excuses" philosophy in which no excuses are accepted for students' lack of academic success or for unacceptable behavior. Teachers at the school have a charge to ensure that the students are empowered and motivated to meet the high expectations imposed upon them by the school's culture and the community. School successes will be celebrated throughout the school year in a variety of ways with the goal of keeping parents, staff and students motivated. Heritage Collegiate is committed to providing a learning environment that differs in

many ways from what is offered in Bertie County Schools, although the greatest difference is its innovative instructional delivery strategies, its culture, and its belief in students. Our school will offer rigorous instruction that fosters higher-order thinking to better prepare students for their real-world experiences.

Appendix A, Adde

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.*
3. Provide parents and students with expanded choices in the types of educational opportunities that are available within the Bertie County Public School System.

Heritage Collegiate Leadership Academy, as an established public charter school, will provide the parents and students of the county with a viable public option for their children's education. It is our belief that one of the ways in which Bertie County can jump start its economic status and to improve the achievement of students in the county is to provide viable educational options for parents to educate their children. Heritage Collegiate's commitment to the people of Bertie County is to provide a sound, rigorous, and innovative program of study to challenge students academically and to prepare them for college and other rigorous endeavors. It will also offer programming to grow great leaders, and to help students to understand the expectation of service by giving back and making a difference in their community. Heritage Collegiate will also contribute to promoting the economic development of the county, to elevate the level of students' learning and successes, and will make students competitive contributors to their local community, our global society, and the world at large.

We, at Heritage Collegiate, will provide a viable educational option in the Bertie County community that promotes high academic standards and social expectations for all students. In addition, Heritage Collegiate will provide a college preparatory program of study with an emphasis on leadership development and service to the community which will strongly and positively impact the Bertie County community at this time and for years to come. Also, it is our belief that the presence of a public charter school in the county will ultimately lead to substantial improvement in all public schools in the county--which will have a tremendous impact in the county. Currently, no viable educational options exists for families in Bertie County who cannot afford to pay to educate their children.

4. Improved student learning

Heritage Collegiate is committed to improving the learning of all of its students. According to data from the 2011-12 NC Report Card, in 2012 Bertie County's public school students scored below the state's average on the State's reading assessments in grades 3-8 and in all grades in mathematics, except for grades 7 and 8. Also, according to the data, on high school assessments such as the SAT and ACT, Bertie County students have consistently performed below the State average. It is our belief that students who attend Heritage Collegiate will be appropriately prepared to perform consistently above the State average at every grade on all State assessments as well as on the ACT and the SAT in high school. The rigorous curriculum and innovative delivery strategies offered to engage students at Heritage Collegiate such as blended learning, differentiated learning, and the integration of the arts will provide equitable opportunities for every student to be successful in their current educational endeavors and at their higher levels of education. Well-designed systems, highly qualified staff, effective leadership, high expectations for students, and extended time-on-task for learning will all contribute to preparing students to be competitive in high school, in college, and the global marketplace. Students will learn using systems such as the Advancement Via Individual Determination (AVID) college preparatory curriculum from grades K-8. Each student at Heritage Collegiate will be required to take Latin infused into their English/Language Arts classes which will enhance their vocabulary and their ability to understand the meaning of words which will improve their basic literacy skills and reading performance whether reading for pleasure or demonstrating language performance on an assessment.

Students at Heritage Collegiate will get project-based and service-based learning opportunities that will foster development of reading, research, writing, and presentation skills that are necessary for 21st century students to be successful in elementary school, in middle school, in high school, in college and the world beyond. Heritage Collegiate will routinely expose its students to the scientific inquiry method and systems of error analysis in mathematics. Heritage Collegiate's instructional delivery strategies and plans for instructional interventions for students will be driven by data from its system of ongoing formative classroom assessments and will focus on meeting students where they are in order to help them maximize their potential and to be successful academically. Struggling learners will be given opportunities during the school day for some level of instructional support/intervention in areas needing improvement (based on ongoing formative classroom assessment data) while students who are excelling (based on ongoing formative classroom assessment data) will be given opportunities for enhanced and enriched instructional support. Ongoing classroom formative assessments will be administered at the end of each

instructional unit and/or project to assess students' learning and understanding.

6. Encourage the use of different and innovative teaching methods

Heritage Collegiate is committed to employing creative and innovative teaching methods and strategies to engage students and foster student learning. In addition to different, innovative practices addressed in the previous purposes such as differentiated learning, the blended learning rotational model, project-based and service-based learning, college preparatory learning, character-based learning, and leadership training beginning in lower grades, students at Heritage Collegiate will be engaged in "Debates Across the Curriculum" at every grade and content by taking sides on current issues and debating the pros and cons of an issue with other students. Students will be required to conduct research to get information to support their position in order to participate in classroom debates. Students at the middle school level will have additional opportunities to participate in competitive debates with students from other schools offering instruction in debating. Also, students will have opportunities to participate in "life coaching" to improve their self-efficacy. Since we believe that a student's attitude toward learning is just as important as a student's preparation for learning, students will be taught how to set SMART goals, how to function in a "no excuses" culture, how to "fail forward," and how to develop their character and how to be successful using strategies based on Coach John Wooden's theory for success. Students exposure to practices based on the special leadership curriculum (KidLead) on building leaders will help students develop a sense of purpose greater than themselves rather than mere social and economic attainment. Heritage Collegiate believes it has the responsibility to help students to understand their role in society and to help them shape their own moral principles. Formal class time will be dedicated to this type of instruction. Heritage Collegiate is committed to fostering a culture of reflection and personal growth that will help students as they develop and mature. In addition, Heritage Collegiate is committed to working collaboratively with Bertie County Schools and others to ensure that the appropriate professional development for public school administrators and staff is offered to assure that teaching staff is able to employ the strategies to promote students' success. Bertie County Schools' staff will be encouraged to plan and participate in professional development opportunities offered by and at Heritage Collegiate in our efforts to improve the instructional practices of all public education staff in the county.

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?*

Heritage Collegiate's governing board will know that the school has attained its mission in numerous ways. First of all, the school's leadership will be required to submit an annual report to the governing board at the end of each fiscal/academic year in which the board is informed about the performance status of the school. The school's leadership will report on the following using the appropriate metric: the school's performance on the State Accountability standards, the percent of students performing at or

above the state's standards on state-mandated assessments--specifying each assessment by content and grade, how teachers performed on the teacher evaluations highlighting some of their innovative teaching practices, how students performed on the benchmark assessments, how students performed on the classroom assessments, how students performed on their PEP goals highlighting a few students' achievement, the financial status of the school, how the school performed on its internal goals, the school's students' attrition rate, the school's teacher attrition rate, staff's attendance rates, students' attendance rates, students' suspension rates and other indicators of the school's overall success which the governing board may decide to add to this list.

The school's leadership will use the common metrics used to report the school's performance. The initial indicators of success will determine the baseline data for the school. In addition, the report will show how Heritage Collegiate compares to other schools in the state, and how the school is performing in relation to its own goals and its mission. Metrics used will be the ones typically used in educational and financial reporting permitting the board to compare the school's performance to its own goals, to Bertie County Schools, to other similar charter schools, and to the State averages.

In addition, at the end of its first year and every three years thereafter, the school's leadership will schedule an independent external program evaluation (program audit) that culminates into a report of its overall effectiveness. This information will be shared with its governing board, the NCDPI Office of Charter Schools, and other stakeholders deemed appropriate. The school's leadership staff and its governing board will provide a written response to the findings and recommendations in each evaluation report. The external evaluator will be expected to use a variety of strategies such as surveys, checklists, focus groups, and other methods deemed appropriate to collect data in order to make determinations about the school's effectiveness. The governing board will use the results from the program audits in addition to the annual reports to make determinations about the degree to which the school has achieved its mission, goals, and its overall effectiveness and will direct the staff on areas where the report and the program audits reveal that improvements are warranted.

- 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.*

Heritage Collegiate used the SMART goals system to set the preliminary annual performance goals for the school's educational program. The goals set for the school are specific, measurable, attainable, realistic and timely. The preliminary annual student achievement performance goals for the school are as follows:

Annual Student Achievement Performance Goals:

Heritage Collegiate has set the following preliminary goals; however, the goals will be re-examined at the beginning of the 2014-15 academic year. Staff members and the governing board will use the SMART system to re-evaluate these goals using student achievement performance data for the

students from their referring schools prior to coming to Heritage Collegiate in relation to the preliminary annual goals established for Heritage Collegiate. Also, this process will facilitate the plan for setting individual student goals which will be included in the students' personal education plan (PEP) and Individualized Education Program (IEP) for students with disabilities.

* Heritage Collegiate will have at least 75 percent proficiency target for all students on the State end-of-year assessment in Reading (grade 3) at the end of the 2014-15 school year.

* Heritage Collegiate will have at least a 75 percent proficiency target for all students on the State end-of-year assessments in Mathematics (grade 3) at the end of the 2014-15 school year.

* Heritage Collegiate will meet its goals set by the State for Adequate Yearly Progress under the federal accountability system.

* Heritage Collegiate will meet and/or exceed the annual growth rates in Reading set by the North Carolina Department of Public Instruction Accountability Division.

* Heritage Collegiate will meet and/or exceed the annual growth rates in Mathematics set by the North Carolina Department of Public Instruction Accountability Division.

Since NC is moving to a new accountability system, these goals will be re-evaluated at the beginning of the 2014-15 academic year to ensure that goals are consistent with State requirements for accountability.

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.

Heritage Collegiate's overall instructional program will offer a high quality project-based, "no-excuses", child-centered, college preparatory, leadership-focused educational opportunity targeting students in Bertie County. The school has a commitment to meet students where they are in order to help them maximize their potential regardless of their ability level by empowering them to want to achieve greatness. The students will receive hands-on experiences throughout their education that will enhance their overall learning by helping them to make real-world connections. The school will develop the whole child by addressing their academic, social, emotional and behavioral needs throughout their learning experiences.

Students will be taught a project-based curriculum in each of the content areas. The NC Common Core Standards will provide the framework for academic content in (1)English/Language Arts and (2)Mathematics in grades K-8. Even though the State standards will be used as the academic framework, there will be an expectation of academic rigor in which students will be required to demonstrate mastery by developing and presenting academic projects that are meaningful, real-world, and that integrate knowledge and skills from all of the disciplines learned. In addition, teachers will use a variety of innovative strategies to deliver instruction in every discipline engaging students and ensuring a high degree of learning. Students will be required to use information from every discipline to learn to conduct research, write, present, and speak in the development of their academic projects. An emphasis will be on reading, writing, speaking, thinking critically, inquiry, organization, and problem solving in all of the content areas. Students will also be taught (3)Science and scientific inquiry, (4)Social Studies in grades K-8 using State essential standards also with the expectation of academic rigor and critical thinking and an understanding of where places are, how the world works, the role of the economic, political, and other systems on every aspect of life. In addition, to the core curricula, students will be taught(5)how to use technology as a tool to support research initiatives, to organize, store, and present information and to access and analyze data. All students will have at least weekly exposure to (6)Physical Education/Health/Nutrition which will help students become better informed about the causes of many health issues in Bertie County such as excessive smoking, drinking, and drug use, obesity, diabetes, and high blood pressure. To make the learning experiences more versatile and engaging, students will get cultural exposures in (7)Music Appreciation and Genres and Fine Arts to help them learn, understand, and appreciate the different art forms and to encourage student involvement and participation in cultural events in the community. Students will be offered (8)character

education through weekly community learning circles that will teach them regarding behaviors, values, personal growth, development, and leadership. Also, students will be offered foreign languages in the areas of (9)Mandarin Chinese, which originates in China and is a key language used in the global marketplace in the 21st century, and Spanish, a language that is becoming increasingly more common in Bertie County and the country, and (10) Latin infused into English/Language classes to improve students' vocabulary and word meaning skills.

Students will be assessed throughout the academic year using classroom assessment strategies in which teachers will check for understanding and skill mastery. The online ClassScape Formative Assessment System will be used in grades 3-8 as an ongoing formative assessment in reading and mathematics. In addition, students in K-2 will be administered the State K-2 Individualized assessments and in grades 3-8, the State- mandated end-of-year assessments.

K-8 Curriculum and Instructional Design:

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

Heritage Collegiate will have a basic learning environment that is a classroom-based student-centered setting with approximately 20-25 students per class. Students will learn to work individually while working on their projects and in small groups when participating in classroom activities. The school will have a physical education area and at least two technology labs through which students will be expected to rotate. The instructional setting is expected to make use of multiple technologies such as computers, IPADs, Smart Boards, and remote learning opportunities. Students will also receive their online formative and benchmark assessments using the computers. These online assessments will be administered at the end of each instructional unit and the data used to inform instructional decisions about individual students as well as groups of students. Heritage Collegiate plans to provide daily extended hours of instruction (8:00-4:30 p.m.)for all students to provide time for any necessary instructional intervention as well as enrichment opportunities for the AIG students.

Heritage Collegiate will have a primary, elementary, and middle school components (K-8)to its operation. The school will be in session for 185 days and/or 1025 hours for each academic year.(A copy of the proposed academic calendar with the total number of days appears in Appendix R.) The school's education program is designed on two key ideals:

(1) All students can learn and are capable of achieving at the highest levels. In the 21st Century, students must be prepared for college and the real-world throughout the public school experience beginning when they enter school in kindergarten. Providing a rigorous academic curriculum with college preparatory opportunities for every student provides a gateway for students to become competitive for college beginning when they are young. Extended time for learning, and a highly qualified highly motivated staff using college preparatory and leadership curricula will prepare students for success in the high school college preparatory programs, success in college, and success as community and world leaders. (2) All students will receive training to build their leadership skills and an ethical philosophy to support their character development. The KidLead leadership curriculum

focuses on developing the 16 most important qualities desired in leaders based on a compilation of research, by Dr. Alan Nelson. Students will be taught to become leaders and to develop a sense of purpose beyond themselves that is greater than mere social and economic attainment. In addition, students will learn a system of rewards and consequences using the "paycheck system". Heritage Collegiate takes on the responsibility of teaching students to understand their role in society and how to shape their own moral principles. Formal class time will be devoted to character education and building leadership skills as it is our belief that our students represent the future. Educating a school of "leaders" will improve the local community and society at large in the short and long-term.

In addition, structure at the school will be provided so that each student will know, understand, and expect school-wide systems, routines, and procedures from classroom to classroom that support student learning. Each classroom's white-board will be arranged using the same format consisting of the date, the AIM (desired outcomes), the agenda, and homework for the day. Teachers will also plan their lessons consistent with units, AIMS (desired outcomes), and objectives during common planning sessions directed by the school's instructional leadership team to ensure continuity and alignment from classroom to classroom and vertical articulation from grade to grade. Teachers will use the school's website to re-enforce assignments and to provide additional information and resources for students and parents.

Provide a synopsis of the planned curriculum, including:

1. One sample course scope and sequence (preferably in graph form) in the Appendices (Appendix B) for one core subject (specific to the school's purpose) for each division (elementary, middle) the school would ultimately serve.
2. Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model.

Heritage Collegiate is committed to fulfilling its mission to its students and the community it serves. As such, the curriculum that it proposes to offer aligns with the proposed school's mission, the targeted student population, the North Carolina required assessments, and the North Carolina Accountability Model. The NC Common Core Standards in ELA and Mathematics and the Essential Skills Standards in Science and Social Studies will provide the basic academic content framework for student learning at the school and aligns with the State's benchmark and summative assessments and the State's Accountability Model. The other learning experiences offered for students at Heritage Collegiate align with the mission of the school in areas such as Fine Arts exposure, Latin infusion in ELA classes to improve students' vocabulary and meaning of words, foreign languages such as Spanish, and Mandarin Chinese, as well as character education. These program offerings will make students more versatile, will help them develop virtue, courage, wisdom, and an understanding of the character traits and skills that produce leaders of excellence academically and relationally. who are motivated themselves to do well and who will inspire others as they participate in high school, college, and the global society. The health/physical education/nutrition component of the curriculum will help students develop into healthy individuals who will become better informed about the causes of many of the illnesses and health issues in the community and society as a whole. Students will be prepared, through their training at Heritage Collegiate, for high school, college, and to become leaders in the

community and in the society as they develop and mature. The project-based learning and service-based learning models proposed by the school will prepare students to succeed in high school, college, and in the community by understanding how to develop projects and present them and how to give back as they move forward at the school--developing themselves, maturing, and inspiring others. The academic rigor that the school proposes will be handled through the diverse strategies employed to teach students to think critically when solving problems and making decisions and the high expectations for student performance imposed by the culture and the staff at the school. All students at Heritage Collegiate will be expected to master the use of the different components of technology especially the computers and software used for research, data analysis, and presentations. In addition, students will be expected to be able to use computers at the school for individualized instruction, for formative assessments, and to develop and implement students' writings and class projects. Students will also use computers as required for any necessary remote learning and to participate in blended learning sessions in which teachers rotate and often make use of technology to enhance the learning experience for students. Armed with this information, students will be able to share what they have learned with family members and others in the community.

3. 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.

Heritage Collegiate will expect all of its staff to master innovative instructional strategies to help students become successful and to fulfill its mission, purposes, and goals. It is expected that teachers will participate in mandated professional development and other experiences to learn how to increase the rigor and engagement of their instructional delivery, to improve their content skill level, and to increase the academic achievement of their students. Heritage Collegiate believes that inclusion of these strategies will maximize the educational opportunities for students. Heritage Collegiate will use a variety of strategies including but not limited to (1) AVID (Advancement via Individualized Development) to foster its college preparatory program across all grades by preparing and equipping students with skills for college and success in a global society. To continue the college preparatory mindset, all staff will be required to read and maintain a copy of (2) "Teach Like A Champion" by Doug Lemov and discuss its tenets in a professional development setting held at the beginning of the school year and implement its practices. The goal is to help teachers to understand the promise to help every child maximize their potential and to ensure that every activity is to prepare students to become college ready and leaders. Leadership training includes (3) "Pyramid of Success" by Coach John Wooden in which students are taught the 12 lessons of success; and (4) KidLead from Dr. Alan Nelson, which "targets leaders when they are young by teaching them writing, inquiry, collaboration, organization, and reading skills. KidLead teaches the 16 most desirable qualities of a leader. It also has a service-based component to its transformational curriculum which emphasizes service to the community. Other (5) character education components to the program at Heritage Collegiate using the "no excuses" model. "No Excuses" schools reject excuses for under-achievement and poor behavior; because to make and allow excuses is to lower expectations of what students can achieve. Other celebrations of students' successes such as enrollment in the "national honor society" organizations and other recognitions of students who are high performing and/or who have successful experiences along the way will be employed to ensure students are motivated and recognized for their successes and

achievements.

Another character education program at Heritage Collegiate consists of a system of (6) student "life coaching" strategies which will help students improve their self-efficacy. Students will be taught (7) project-based learning opportunities that will foster reading, research, writing, and presentation skills that students will need throughout their lives. Students will be taught (8)critical thinking skills when solving problems and making decisions and how to participate in (9)Socratic Seminar discussions which as a strategy encourages collaborative intellectual dialogue using questions,(10)classroom "debates across the curriculum" with opportunities for students in the middle grades to participate in competitive "debates". (11)Remote learning opportunities will be available at Heritage Collegiate to offer learning opportunities and experiences for students in areas in which they may not otherwise be exposed such as Mandarin Chinese and enrichment for AIG students. Teachers at Heritage Collegiate will use (12)differentiated teaching and learning strategies for students who may be low or high performers in order to meet students where they are. (13)Blended Learning strategies will also be implemented which is a strategy in which students rotate on a fixed schedule or at the teachers discretion between learning modalities, at least one of which is online learning. Heritage Collegiate will provide professional development to train its teachers to learn and implement these innovative strategies in order to maximize student learning.

4. 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.

Heritage Collegiate is committed to serving its students for a minimum of 185 days or 1025 hours for every given academic year. The school doors will open for students at 7:30 a.m. (breakfast will be served at 7:30 a.m.)on each school day. The academic day will begin at 8:00 a.m. and end at 4:30 p.m. Students will be excused according to state and federal scheduled holidays and teacher workdays which will be included in the academic calendar approved by the governing board. Whenever a school day is dismissed or not convened due to inclement weather or some form of emergency or disaster, provisions will be made to make up the loss time as soon as the school calendar permits but before the end of the academic year. Because Heritage Collegiate is committed to scheduling classes Monday through Friday by including extended instructional hours, the academic calendar and the school schedule will reflect these requirements which will be included in all marketing materials and provided to all students and parents as a component of the application/admission process. Heritage Collegiate seeks to have extended instructional hours to ensure that the instruction, experiences, and services students need will be provided to help them become successful. The proposed extended instructional time is consistent with the requirements of the school's mission and its proposed educational plan. Professional staff will be provided a small supplement (stipend of \$1,200 annually)to compensate teachers for the extra time they will be expected to put into the academic day.

The school's proposed academic year will begin on August 15, 2014 with professional development and academic planning sessions for teachers. The school will open for kindergarten and first grade students effective August 25, 2014 and second and third grade students on August 26, 2014. The academic year will end for all students on June 12, 2015. A copy of the proposed academic calendar is attached in the Appendix R section of the

application.

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.

Heritage Collegiate will use strategies such as the Tier 3 Response to Intervention (RtI) program which identifies learning differences early in a student's academic trajectory. The federal government strongly encourages schools to adopt the RtI approach, in order to avoid excessive classification of low-performing students who do not necessarily have a learning disability as special education students. Heritage Collegiate believes that non-severe learning differences can be improved through individualizing/differentiating teaching and learning.

Our approach is to serve every child daily with over an hour of intervention in the designated Learning Lab where students receive 1:1 and small group instruction with tutors. As a consequence, the RtI model results in a smaller number of students being classified as special education students because all students are receiving a highly individualized instruction tailored to their unique set of needs and documented in their personal education plan (PEP). At Heritage Collegiate, no student is expected to fall through the cracks as through identification, acceleration, and enrichment, all students will be able to realize and maximize their potential. Each student at Heritage Collegiate, regardless of their level of academic performance, will have a Personal Educational Plan (PEP) which identifies and requires goals to be set for each student with a plan to employ differentiated prevention and intervention strategies especially for students who are NOT achieving grade level standards in reading and mathematics. The PEPs will be monitored closely by the teachers and staff to ensure that the students are realizing set goals. In areas such as reading and mathematics, students will be given tutorial intervention services and opportunities for remedial instruction routinely as a component of their extended hours of instruction. All students in English/Language Arts and mathematics will be administered formative assessments at the completion of instructional units using the online ClassScape Formative Assessment System. The system aligns with the State's Common Core Standards and provides data to help inform instruction for individual students requiring differentiated intervention strategies. The entire staff at Heritage Collegiate will become involved in developing strategies for students who are at-risk of failing to help them become successful. Teacher instructional team meetings will be held to develop comprehensive plans to work with these students. The staff at Heritage Collegiate will have high expectations for all students regardless of their need for special services. At-risk students' access to the educational programs at Heritage Collegiate will always be provided in the least restrictive environment feasible.

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.

1. The staff at Heritage Collegiate will use the process designated by the state and approved by the federal government (Title III of the No Child Left Behind Act of 2001) to identify students and provide services to students identified as English language Learners (ELL). Heritage Collegiate will follow the guidelines set forth by the North Carolina State Board of Education to identify students using the Home Language Survey (HLS). Heritage Collegiate will use the State designated World-Class Instructional Design and Assessment (WIDA) to determine the level of services and assessments and the length of time students are to be involved in the special ELL program.

2. Students identified as ELL (English Language Learners) will be included in regular classes with an allowance of support services using designated and approved accommodations for the students. ELL students' access to the comprehensive educational program at Heritage Collegiate will be provided in the least restrictive environment feasible.

3. The staff at Heritage Collegiate will follow the guidelines established by the State Board of Education based on federal guidelines to determine when students are eligible to exit the ELL program without negative consequences. The ELL students parents/guardians will be involved in the identification, monitoring, and termination decisions of ELL for all students identified. The staff at Heritage Collegiate will have high expectations for all students regardless of their need for special services. ELL students' access to the educational programs at Heritage Collegiate will always be provided in the least restrictive environment feasible.

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.

1. Heritage Collegiate will meet the needs of Academically/Intellectually Gifted (AIG) students by first ensuring that they are appropriately identified. The staff will identify students for its Academically/Intellectually Gifted Program using the system devised by Joseph S. Renzulli, Director of the National Research Center on the Gifted and Talented, University of Connecticut--"A Practical System for Identifying Gifted and Talented Students". Renzulli's system for identifying gifted and talented students is based on a broad range of research that has accumulated over the years on the characteristics of creative and productive individuals (Renzulli, 1986). His research shows that highly productive people are characterized by three interlocking clusters of ability, these clusters being above average (though not necessarily superior) ability, task commitment, and creativity.

Renzulli's identification system suggests that personnel look for a talent pool of approximately 15 percent of higher ability students needing supplementary services. Though it can be adjusted depending on the availability of resources. The teaching staff will have to (a) modify the regular curriculum for above average ability students, (b) participate in various kinds of enrichment and mentoring activities, and (c) to work cooperatively with other staff with special program assignments. The Renzulli system has six steps: Step 1: Test score nominations, Step 2: Teacher nominations, Step 3: Alternate pathways--student and parent

nominations, Step 4: Other Special Nominations (Safety Valve No. 1), Special nominations represent the first of two "safety valves", Step 5: Notification and Orientation of Parents, Step 6: Action Information Nominations (Safety Valve No. 2). Renzulli cautions that step 1 be minimized especially when considering primary age students, disadvantaged populations, or culturally different groups.

The staff will employ the steps in Renzulli's research and book. The school will use test results from the State reading and mathematics end-of-year assessments as the first step. Students who score at or above the 90th percentile in reading and/or mathematics end-of-year assessments will be eligible. Teachers will be taught how to differentiate instruction to ensure that AIG students are challenged on a daily basis. AIG students will be encouraged to serve as peer tutors for their peers at the school. AIG students' performance on all assessments as well as their performance in the classroom will be closely monitored to ensure that their needs are met and that they are being challenged on a continual basis. Also, AIG students will be encouraged to use the extended hours in the instructional day to enhance their learning and to have opportunities for additional challenging experiences. Services through differentiation or flexible grouping in reading and mathematics will be a part of an AIG student's daily learning experiences. If a student is in grade 3 but reads at a grade 5 level, that student will be permitted to do some work in reading groups routinely at the higher grade. All staff at Heritage Collegiate will be trained on this differentiated reading method and flexible grouping. In differentiated learning groups, the school gets to serve all kids by meeting them where they are. Teachers can modify, extend, or compact the curriculum using this method.

2. Once enrolled in AIG, students will NOT have to be retested unless it is determined that additional services may be needed. The school will have an annual process in which staff will review level of services and students' performance. The AIG Team will meet to discuss students' progress in the program and to report students' progress to students and their parents. A master teacher at the school will be designated as the AIG coordinator at the school. "Maximizing Gifted Students Potential" by Brulles and Winebrenner will be used as a guide for services to AIG students.

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)

1. Heritage Collegiate is committed to providing students with disabilities an appropriate education in the least restrictive environment that will develop them mentally, physically, emotionally, and academically. Given that the current ratio of students with disabilities is approximately 13% of the total enrollment for Bertie County Schools, Heritage Collegiate assumes that up to a 13 percent ratio will occur in its overall enrollment but with guidance from the governing board, the budget projects a 10 percent ratio initially in the federal revenue line item, relying on underestimation. Heritage Collegiate will identify students with disabilities by accepting referrals for a student to be identified as a student with a disability based on a referral for 1) Section 504 which is part of the Rehabilitation Act of 1973, a civil rights law that prohibits discrimination of students on the basis of a handicapping condition, or 2) an Exceptional Children's Program in which the Individuals with Disabilities Education Act (IDEA) has a defined list of disabilities. When a teacher, parent, or other involved person suspects that a child may be a child with a disability, he/she will provide in writing the reason for the referral, addressing the specific presenting concerns and the student's current strengths and needs. The referral is to be given to the principal, the child's teacher or other school professional at the school. The principal at Heritage Collegiate will accept and review all written referrals for students with disabilities; and provide assistance to parents, if needed, in completing the written referral, and inform parents and others who make an oral referral that it must be in writing. The school staff will then conduct the initial evaluation in accordance with NC 1503-2.4 through NC1503-2.7 which 1) must be conducted; eligibility determined; and for an eligible child, the IEP developed; and placement completed within 90 days of receipt of a written referral; and must determine--a. if the child is a child with a disability under NC 1500-2.4; and b. the educational needs of the child.

2. Heritage will identify students who may be eligible for special education under the federal "Child Find" (NC 1501-2.8) mandate by accepting referrals in the admission process for students with disabilities who reside in Bertie County. Student's admissions will be based on the application process and the lottery, however, any student with a disability whose application because of their admission number warrants admission will be admitted regardless of their circumstances or the severity of their disability. Students will be admitted in grades K-8 in the following manner: (i) All students with disabilities ages 3 to 21 residing in Bertie County including children who are homeless, or are wards of the State regardless of the severity of their disability, and who are in need of special education and related services, are identified, located, and evaluated; (ii) All children with disabilities 3 through 21 placed by their parents in a private school located in Bertie County, regardless of the severity of their disability, and who are in need of special education and related services are identified, located, and evaluated; and (iii) A practical method will be developed and implemented by the staff to determine which children are currently receiving special education and related services. Heritage Collegiate will also recognize that "Child Find" must also include: (1) Children who are suspected of being a child with a disability and in need of special education, even though they are advancing

from grade to grade; and are (2) highly mobile children, including migrant children. As the school recruits students from all over Bertie County, using a variety of strategies, the chances of identifying students under "Child Find" and having them enrolled at the school is greatly enhanced.

3. Records of students with disabilities Continued below

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.

1. Heritage Collegiate is committed to providing students with disabilities an appropriate education in the least restrictive environment (inclusion) that will develop them mentally, physically, emotionally, and academically. Heritage Collegiate is committed to providing services to students with disabilities in the same way it does for other students attending the school. The staff will use a variety of teaching strategies noted in the educational plan such as differentiated teaching and learning, Leadership Training, Blended Learning using the rotational model, "no excuse" learning modeling, Socratic seminars, Character Education concepts, project-based and service based learning always focusing on the educational needs of the individual student and his/her learning goals as identified in the student's IEP or Section 504 Plan. Heritage's commitment is to "meet students where they are then teach and motivate them to soar".

2. Heritage Collegiate will employ whichever teaching methods and support strategies determined to be necessary to support the students with disabilities. Students with disabilities, regardless of their disability or its severity, will be assured of a Free and Appropriate Public Education (FAPE) at the school. The staff will research all available state and federal regulations, guidance, and resources to ensure that all students are enrolled are able to receive a free and appropriate public education regardless of the needs of the students.

3. The special education teacher at the school is responsible for working with the IEP team to develop and monitor the implementation of a student's IEP. The special education teacher will request that parents, students, and other relevant staff attend the meetings. It is during those IEP meetings that students' goals are set, discussions are held about their progress toward meeting the goals and data are shared about their overall performance, and whether goals should be modified. The special education teacher will serve as the resource teacher and will provide leadership at the school on matters related to educating students with disabilities such as processing referrals, heading up the IEP team, developing and monitoring IEPs and Section 504 Plans, keeping parents informed and involved in their students' IEP and learning processes, collaborating with other teachers of the students with disabilities, storing, maintaining, and securing student records, ensuring that IEP teams meet, as needed, to monitor student progress and to work with the teams to set goals, as required. One special education teacher will be hired initially.

4. All related services needed by students with disabilities such as transportation, developmental, corrective and supportive services in order to develop them mentally, physically, emotionally, academically, and vocationally will be made available to students enrolled. The governing board and staff will pursue all available local, State, and federal guidance, regulations, and resources to ensure that the educational needs of students with disabilities at the school are met. Related services specifically relate to services such as but are not limited to: speech-language pathology and auditory services, interpreting services, psychological services, physical and occupational therapy, recreation including therapeutic recreation, early identification and assessment of students with disabilities in children, counseling services, including rehabilitation counseling, orientation and mobility services, and medical services for diagnostic and evaluation purposes. Related services may also include school health services and school nurse services, social work services in schools and parent counseling and training. Heritage Collegiate will take the steps necessary to ensure that the individualized needs of students with disabilities who are enrolled at the school are met regardless of the severity of their disability or the level of need.

Identification and Records Continued.

3. Heritage Collegiate's plan for managing the records of students with disabilities who have IEPs and Section 504 accommodations is as follows: a) If a child with a disability transfers to Heritage Collegiate from another school, no release is required to transfer educational records between the old school and Heritage Collegiate, however, the student's records will be kept secure and confidential. b. In order to maintain the confidentiality of student records at Heritage Collegiate, the following will be done: 1) records will be stored in a secure locked location; c. 1. An access list will be posted on the storage cabinet indicating who, within the school, has permission to view the records. (Individuals on the list are not required to sign the access sheet in the record, when accessing the students' records.), and c.2) An access signature sheet will be provided in the record for individuals who are not on the posted access list who may need to access students' records. The access sheet must include the name of the person reviewing the record, the date of the review, and the purpose for the review. The staff at Heritage Collegiate will be informed of the process for accessing the records of students with disabilities. The special education teacher will assist the school's principal by overseeing this process for accessing student records to ensure that it is properly implemented.

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.
1. Heritage's student performance standards will be based on the State requirements for Accountability. The specific goals are as follows:
* Heritage Collegiate will have at least 75 percent proficiency target for

all students on the States end-of year assessment in Reading at the end of the 2014-15 school year.

* Heritage Collegiate will have at least 75 percent proficiency target for all students on the States end-of-year assessments in Mathematics at the end of the 2014-15 school year.

* Heritage Collegiate will meet at least its goals set by the state for Adequate Yearly Progress (AYP) under the federal accountability system.

* Heritage Collegiate will meet the growth standards in reading established by the state in its accountability model.

* Heritage Collegiate will meet the growth standards in mathematics established by the state in its accountability model.

2. Heritage Collegiate, in addition to participating in the state and federally-mandated assessments, will participate in the revised online ClassScape Formative Assessment System (revised to measure the State's Common Core Standards in Reading and Mathematics, and the Essential Standards in Science). ClassScape is an online formative assessment system available through North Carolina State University-Technical Outreach for Public Schools Program for a per school fee. The system assesses students' performance on goals and objectives taught grade by grade and subject by subject and can be used to measure student progress at the end of a unit or any specified block of instruction. The online formative assessment system also provides benchmark assessments in reading and mathematics which can be administered at the end of each semester to determine students' progress in achieving their individualized goals. The system reports the student performance data for each student individually, and can be reported for groups of students disaggregated based on any variable required to help teachers inform or to differentiate or to redirect instruction. The benefit to teachers and students is that the results from the assessments can be provided in real time or immediately after the assessment is completed. The data can be used to inform instruction and to direct interventions for at-risk or low performing students and high performing students (AIG) to help direct the differentiated teaching/learning process. In addition, the data can be used to measure the progress of the students in the middle and their performance relative to their PEP goals. Teachers and students will receive reports and data to show the areas where students have demonstrated proficiency and areas where some level of intervention is required in order for students to progress to the next step in instruction.

3. All students at Heritage Collegiate will be required to meet all promotions standards set forth by the State, including the reading standard at grade 3. In addition, Heritage Collegiate will require students to pass both reading and mathematics based on demonstration of proficiency on the end-of-year State assessments, students must pass either science or social studies and 50 percent their electives. In addition, students must meet the the school's attendance requirements, in order to be promoted to the next grade. For students who are at risk of failing, including students with special needs, Heritage Collegiate will provide remedial instructional support. All State and school promotion criteria will be shared with parents/guardians in writing during the enrollment process and at every subsequent meeting with parents/guardians throughout the school year. State and school promotion criteria will also be posted on the school's website and will be included in all documents sent home to parents/guardians throughout the academic year. Heritage Collegiate will offer summer reading camps for grade 3 students who fail to meet the reading proficiency

requirements.

Per North Carolina Statute, the principal, using all available student information, will make the final decision regarding a student's promotion to the next grade.

4. The graduation standards for grade 8 will require students to successfully complete their year-long grade 8 academic project, meet the school's attendance policy, and have at least a passing grade of "D" in either science or social studies, and pass at least 50 percent of their elective courses. Students will also be expected to successfully complete the grade 8 English/Language Arts and mathematics proficiency standards by demonstrating proficiency on the State-mandated assessments at grade 8. Beyond State standards, students graduating from Grade 8 will be given a certificate indicating that she/he has successfully completed the requirements of Heritage Collegiate Leadership Academy and are thereby eligible for enrollment in high school.

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.

Heritage Collegiate has set high standards for students, families, and staff in order to educate students as academic scholars. To ensure that students at Heritage Collegiate are able to become college graduates who are world leaders, who make worthy contributions and whose decisions are made based on their moral belief and integrity, students must learn discipline. They must remain focused in order to access the challenging, rigorous curriculum encountered at the school. This can only be accomplished with the active participation of the entire educational community. While learning other disciplines, students must also learn a code of conduct.

The following delineates the Code of Conduct students are expected to follow at all times: 1)Students are to focus on their academic responsibilities during school hours, 2)Students are to be respectful and kind to each other, to the staff, to their families, and to people in the community. 3)Students are to adhere to the dress code for students outlined in their student handbook. 4)Students are to attend class regularly, be on time, and 5)Students are to accept responsibility for helping to maintain the school's physical environment and culture.

1.The school's discipline policy will help support and reinforce the mission of the school. Students' commitment to the discipline policy will lead to a nurturing school environment that sets the stage for engagement and academic excellence and success. The staff is committed to upholding high expectations for students and themselves. As such, they remain

responsible for establishing a positive school culture that motivates students. The staff will model and identify appropriate conduct and behaviors in varying environments throughout the course of the school day and academic setting. Learning how to transition behavior in various settings remains a valuable component of the versatility required of students as they transition through life. All staff will be trained to support and enforce a school-wide positive discipline policy that is embraced by the staff and students alike. The schools Code of Conduct is described in detail in the (Draft) Heritage Collegiate Family/Student Handbook.

2. Students may be suspended or reprimanded for the following offenses: a) Cause or attempt to cause or threaten to cause physical injury to another person; b) Possess, sell or otherwise furnished any fire arm, knife, explosive, or other dangerous object; c) Unlawfully possess, use, sell or otherwise furnish, or be under the influence of any controlled substance or alcoholic beverage or an intoxicant of any kind while at school; d) Unlawfully offer, arrange or negotiate to sell any controlled substance or an intoxicant of any kind, and then either sell, deliver or otherwise furnished to any person on campus another liquid, substance, or material and represent the liquid, substance, or materials as a controlled substance, alcoholic beverage or intoxicant; e) Commit robbery or extortion; f) Cause or attempt to cause damage to school property or private property that belongs to others; g) Steal or attempt to steal school property or the private property of others; h) Possess or use tobacco, or any products containing tobacco or nicotine cigarettes, smokeless tobacco, or chew packets while at school; i) Commit an obscene act or engaged in habitual profanity or vulgarity; j) Unlawfully offer, arrange or negotiate to sell any drug paraphernalia; k) Disrupt school activities; l) Knowingly receive stolen property; and m) Knowingly participate in gang activity.

3. Students with disabilities may be suspended for inappropriate behavior while at school but leadership can do so only by following federal regulations and guidelines.

4. Students who have been suspended or reprimanded have the right to appeal the principal's decision to the executive director and, if not satisfied, to the governing board which makes the final decision.

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: Heritage Collegiate Leadership Academy

Mailing Address: 1042 NC 305

City/State/Zip: Aulander NC 27805

Street Address:

Phone: 919-906-9242

Fax: 919-878-6681

Name of registered agent and address: Mildred G. Bazemore
5601 Paul Road
Raleigh, NC 27616

FEDERAL TAX ID: 46-1809428

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:

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
Georgia Beneva Everett	Board Member	BERTIE	Banker

Nick Shook	Board Vice-Chair	BERTIE	Retired Educator/ Former Asst Superintendent
Ernestine Byrd	Board Member	BERTIE	Retired Educator/Community Volunteer
Thomas Ruffn	Board Member	BERTIE	Retired Educator, Former Asst Superintendent
Tonza Ruffin	Board Member	BERTIE	Attorney
Assata Kimbrough Buffaloe	Board Secretary	BERTIE	Attorney
Garrett Taylor	Board Chair	PITT	CEO, Uplift Comprehensive Services

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.*

The governing board of Heritage Collegiate will ensure the school's compliance with all applicable local, state, and federal laws and regulations. The following principles will guide board members: 1) Duty of care; 2) Duty of Loyalty; and 3) Duty of obedience. The board's specific responsibilities will include, but not be limited to the following; 1) defines and refines the organization's mission, vision, and direction; 2) recruits, supports, and evaluates the school's leaders; 3) ensures effective organizational planning; 4) ensures adequate resource; 5) manages resources effectively; 6) determines, monitors, and strengthens the organization's programs and services; 7) enhances the organization's public standing; 8) ensures legal and ethical integrity and maintains accountability; 9) recruits and orients new board members; and 10) assesses board performance. Every board member must discuss and clearly articulate a shared understanding of its roles and responsibilities. The basic responsibilities of the board members are to ensure that 1) the school's academic program is successful, as measured by both internal and external assessments; 2) the school's programs and operation are faithful to the terms of its charter, including compliance with statutory and regulatory requirements; 3) the school is a viable organization, which includes, among other things, that it is financially solvent and has competent professional staff. The individual board members will be expected to do the following: 1) believe in and be an active advocate and ambassador for the values, mission, and vision of the organization; 2) regularly attend and participate in board and committee meetings; 3) contribute to the effective operation of the board by focusing on the good of the organization and the group, supporting board decisions once they are made, and participating in an honest appraisal of ones own performance and that of the board as a whole; 4) stay informed about the school and its issues by reviewing materials, participating in discussions, and asking strategic questions; 5) use personal and professional contacts to reach into diverse communities to identify and recruit donors, volunteers, and advocates to support the organization; 6) serve as a committee member or

task force member as needed; 7) help raise funds by working on a fundraising project or carrying out a particular fundraising task; 8) inform the board of trustees of any potential conflicts of interest, whether real or perceived, and abide by the decision of the board members. During the founding stage of Heritage Collegiate Leadership Academy of Bertie County, board members may have to perform hands-on tasks before staff members are hired. The board has a supervisory and oversight role with respect to the school's leaders: Executive Director and Principal. The board hires, supervises, evaluates, compensates, and (if necessary) terminates the employment of said school leaders. The leaders, in turn, hire, supervise, evaluate, and make compensation decisions with the scales and budget set by the board as provided for by the board-approved annual budget.

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.*

According to the bylaws for Heritage Collegiate Leadership Academy of Bertie County, the board will consist of a minimum of three (3) and a maximum of fifteen (15) board members. The founding board consists of seven (7) members. The governing board members come from diverse backgrounds in business, education, law, and community leadership. There are two retired Assistant Superintendents from Bertie County Schools whose oversight will help to ensure that the school will be an educational and operational success. The board, as a whole, will evaluate the success of the school and school leaders on a quarterly and annual basis. The Heritage Collegiate Advisory Council will be comprised of key stakeholders from the community including parents. Their role will be to serve in an advisory capacity to the board and school leaders.

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 and selected based on the overall needs of the corporation. Each founding member was strategically selected based on the expertise that he/she was able to bring to the corporation at the founding stage. Any vacancy occurring in the Board of Directors may be filled by the affirmative vote of a majority of the remaining board members. The board member so elected shall serve the unexpired term of the the board member that he/she replaces.

4. *How often will the board meet?*

The Board of Directors shall meet at least monthly.

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).*

The board members will receive board training from consultant Darryl Lester, HindSight Consulting, Inc. They will also participate in board training offered via webinars, at selected universities and community colleges. The plan of training will follow the "Demystifying Nonprofit Governance and Management" training series offered by NC Central University School of Law. Sessions include: 1) Overview: Understanding Nonprofit Basics; 2) The Board's Role: Fiduciary Responsibilities, Fiscal Oversight & Governance; 3)

Being an Organizational Champion: Supporting the Organization and the Executive Director; 4) The Board's Role: Fund Development & Financial Support; 5) Stewarding the Organization's Resources; 6) Managing Crises and Transitions; 7) An Overview of NC Grant Makers and Philanthropic Organizations.

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.*

Conflict of Interest. The Chairman of the Board of Directors shall inform the Board of Directors of any direct or indirect conflict of interest which the Chairman of the Board of Directors has with regard to any transaction contemplated by the Board of Directors (a "Conflict of Interest"). A Conflict of Interest shall exist in Board actions including, but not be limited to, actions concerning a transaction:

- (i) in which the Chairman of the Board of Directors has a material financial interest, or
- (ii) in which the Chairman of the Board of Directors is presently serving as a director, trustee, officer or general partner of another party.

Pursuant to the provisions of Section 55A-8-31 of the General Statutes of North Carolina, the Chairman of the Board of Directors may participate in the discussion but may not vote on the transaction and when the Chairman of the Board of Directors does not vote because of a Conflict of Interest, the act of the majority of the Board of Directors voting shall be the act of the Board of Directors if a quorum is present at the meeting.

There are no existing relationships that could pose actual or perceived conflicts if the application is approved.

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

Upon identifying the need for a new policy, the Board of Directors shall follow the following steps: 1) Board-level discussion; 2) Assign a team to draft a new policy; 3) Write a first policy draft; 4) Ask legal counsel to draft policy; 5) Present draft policy to the board for approval; 6) Continue to review and revise board policies on an ongoing basis. With regard to personnel policies, the board has the final authority. The board is the ultimate employer of the staff in the sense that it is the board that makes personnel policy and decisions. Personnel policy may be recommended by the charter school leadership and/or by the personnel committee, but only the board can make final decisions. The board gives final approval of wage and salary scales, fringe benefit programs, vacation plans, and so forth. Finally, the board, usually acting through its personnel committee, may occasionally be called upon to function as a grievance committee with respect to an employee who has a dispute with the charter school administrator(s) and who seeks relief from the higher authority of the board.

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.*

There will be an advisory council for Heritage Collegiate Leadership Academy. Their role will be to advise the Board of Directors. These individuals have been selected for the expertise they bring in areas such as testing and accountability, college preparatory curriculum development,

community outreach, etc. Key stakeholders will serve on this council. In addition, parents will also be selected to serve in this capacity.

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.*

Heritage Collegiate's administrative leadership staff and its designated personnel committee, together, will devise job descriptions for teachers and other staff at the school. They will reflect abilities and skills the school needs to carry out its mission and instructional focus. The job descriptions and advertisements will specify that teachers are expected to be individuals who have at least a bachelor's degree in the area of certification and believe in the public charter school concept. They must be

progressive thinkers who are capable of functioning in a climate of "no-excuses", high expectations, and innovative ideas. The ads will specify that teachers at Heritage Collegiate must be committed to the mission of the school and willing to learn the instructional strategies to be employed at the school such as blended learning and differentiated teaching/learning models. Because the school wishes to hire high performing, highly qualified and highly desirable teachers, a \$1,200 annual supplement will be provided to each professional staff member to compensate teachers for the extended school day (8:00-4:30 p.m.). The goal is to hire highly qualified teachers who have some experience, who have at least a bachelor degree, and North Carolina certification in the grade level and content they are expected to teach. Also, the school will look to hire teachers who are motivated to teach motivated students. The staff for Heritage Collegiate is projected to align with the projected enrollment, the school's mission, the educational plan and programming, and the projected budget for the school. The school administrators will offer professional development for staff at the beginning of the school year and on an ongoing basis to assure that experienced and inexperienced teachers are supported daily. Instructional teams will be encouraged and developed across grades and within content to ensure a system of mentoring and support among teachers employed at the school.

- 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 relationship that will exist between Heritage Collegiate's employees and the non-profit board is that all employees will be employees of the board even though only the Executive director and the principal will actually be recruited and hired by the board. It will be the responsibility of the Executive Director and the principal to recruit and hire other staff members. They will work with a designated personnel committee to interview prospective applicants for all positions after developing uniformed interview questions to be asked of all applicants for a specific position. The school's leadership will then conduct the criminal background checks, check the applicant's references, and make a recommendation to the governing board. The board gives final approval for the hiring of all individuals. This employment practice applies to all employees of the school whether they are contracted staff, paraprofessional, or professional.

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

Heritage Collegiate's governing board's procedure for hiring is to recruit and hire the school's leadership including the executive director and the principal. Other staff of the school will be recruited and hiring recommendations will be made by the principal and the executive director to the governing board which gives final approval for all hires. The criminal background checks and the checking of references will be conducted by the principal and/or the executive director. In situations where the school principal determines that it is necessary to dismiss a school staff member, the staff person may first appeal the decision to the executive director, if the staff member is not satisfied with that decision, the matter is then referred to the governing board which will make the final decision on matters related to dismissing any school staff member.

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

Heritage Collegiate, in a effort to ensure fairness in hiring and setting

salaries, will use the North Carolina salary schedule for the principals, teachers, and paraprofessionals. The salary of the executive director will be determined by the governing board but the salary will be no less than that of a principal with comparable credentials and experience based on the North Carolina salary schedule. The employees at Heritage Collegiate will be eligible for participation in the North Carolina Educators' retirement and benefits including eligibility for participation in insurances such as life, accidental, health, and dental insurances. Information will be provided to staff about investment retirement programs such as 403b and 401k; but, there will be no matching of funds in any amount by the governing board. This information will be estimated and included in the budget calculations under employees' benefits.

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

Heritage Collegiate's grievance policy for employees involves using open communication as the initial approach to settling any issue or dispute between any employees at any level. If that does not resolve the matter, then the employee should first seek to resolve his/her complaint with the principal at Heritage Collegiate through an informal discussion. If such a discussion does not resolve the matter informally, and the employee believes that his/her complaint should become a grievance, then the employee takes a written copy of his/her complaint to the Executive Director at Heritage Collegiate at which time a written complaint of the employees grievance is discussed. If the matter cannot be resolved at this stage, then the employee may initiate a formal grievance given to the executive director which is referred by the Executive Director to the governing board to resolve the complaint. In cases of employee termination, the Executive Director makes a written report to the governing board requesting a termination decision by the board related to the specific employee with all information and documentation related to the incident/matter filed with the recommendation. The governing board at Heritage Collegiate has the final authority to resolve employee grievances and to terminate employees.

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

Currently there are no positions that are expected to have dual responsibilities. In an effort to be resourceful and to fulfill the requirements of the mission to offer a variety of programs and strategies, it may become necessary to hire some staff members as part-time employees and make use of remote staff to fill some highly specified positions such as the part-time Mandarin Chinese. In addition, if enrollment does not meet projections, certain positions such as the financial/data assistant, the administrative assistant, the technology assistant may become part-time positions in order to meet the operational needs of the school and the educational needs of the students. It is possible that if enrollment projections fall below what is expected that some staff may be hired to fill part-time positions instead of full-time positions and that it may become necessary for some staff to have dual responsibilities should budget projections fall short.

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.

Heritage Collegiate will hire a special education resource teacher for each group of 29 students. Once the number rises to 30, then a second special education teacher will be added. This is expected to occur in the second

year of the school's operation. A general education core teacher will be designated to serve as the ELL coordinator for the school. A small stipend of approximately \$400 annually will be recommended for these extra duties. A highly qualified master teacher will be given the duties of AIG coordinator with a small stipend of approximately \$400 annually provided to support the teacher in this role.

- 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).*

The professional positions at Heritage Collegiate will be expected to have at least a bachelors degree (with a masters desired) with experience in the area(s) in which they are expected to teach. They are expected to have a current North Carolina teaching certificate for the grades and the content area they are expected to teach. They must bring a skills set of instructional delivery strategies that are consistent with meeting the needs of students. They must be willing to "think outside of the box", be open to innovative ideas, and believe in the public charter school concept. They must be able to teach effectively and assess students to check for their level of learning and understanding. The executive director, the principal, and the school counselor are expected to have at least a masters degree in an area of expertise even though the governing board of the school may choose to employ candidates with less credentials for the roles of executive director and school principal. These leadership positions must have the necessary training, experience, and skills in leadership as well as the skills and the ability to direct, motivate, and evaluate staff. The school's counselor must have at least a masters degree in counseling. The counselor must be able to work with students in all areas of character development, personal counseling, group counseling and other aspect of student's personal growth and development. The paraprofessional staff and the office clerical staff must all have at least a high school diploma with skills in word processing, writing, light bookkeeping, spreadsheet development and usage, and presentation skills using software such as Microsoft PowerPoint. In addition, they should know how to use all technology at the school including the office and classroom equipment. All staff members must be able to consistently perform effectively in their respective positions and expect to be evaluated formally at least annually with observations and ongoing evaluations occurring as determined to be necessary by the leadership of the school. All positions expected to be employed at the school will be reflected in the school's projected budget. The Mandarin Chinese teacher is included in the operations budget as a contracted position as the service will be through remote learning.

Staff Evaluation and Professional Development

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

Heritage Collegiate's teachers will be required to met teacher licensure and professional development requirements specified by North Carolina and federal laws. The principal will be responsible for ensuring these requirements are met annually.

- 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.*

Heritage Collegiate plans to mentor, train, and evaluate teachers using using a variety of strategies necessary to support teachers to enable them

to be successful facilitators of learning for all of its students. Even the teacher evaluation process will involve noting areas where improvement is required and planning for professional intervention so that teachers are empowered to be effective.

The school's plan for professional development begins as soon as an individual is interviewed for his/her position. In an effort to determine the potential strengths and areas where development is needed, potential staff will be asked about their skills, interests, qualifications during the interviewing process. The next phase of professional development will occur at the point at which staff is hired. When candidates are given approval for employment, they will be informed that they will be given copies of three books that they will be expected to read in preparation for employment at Heritage Collegiate: "Teach Like a Champion" by Doug Lemov, "A Practical System for Identifying Gifted and Talented Students" by Joseph S. Renzulli, and "Maximizing Gifted Students Potential in the 21st Century" by Dina Brulles and Susan Winebrenner. In addition, at the beginning of the school year, just prior to school opening, all staff members (including the clerical staff) will come together for at least three days to receive professional development in all areas of determined need in relation to the school's mission and expectations of staff which shall include to review and understand the following: working in a "no excuse" instructional environment and a culture of high expectations for staff and students, the teaching and assessment of the NC Common Core Standards in English/Language Arts and in Mathematics, language immersion experiences for students in Spanish and Mandarin Chinese; the Blended Learning Rotational Model; AVID College Preparatory Program; Differentiated Teaching and Learning; A discussion of the three assigned readings; Pyramid of Success character education Services Program by Coach John Wooden; KidLead by Dr. Alan Nelson on teaching students to become leaders; Socratic Seminars, Integrating life coaching strategies for student success; Latin as a component of ELA; Working with English language Learners, Section 504, and IDEA requirements for students with disabilities; Debate Across the Curriculum; Principles of Project-Based and Service-Based Learning; and integrating Critical thinking strategies into instructional delivery. External experts in their respective fields will be brought in initially to direct the professional development and training in areas where no staff is skilled to lead. Paraprofessionals will also be expected to participate in the training. Heritage Collegiate plans to work in partnership/collaboration with East Carolina University, Elizabeth City State University, Chowan University, Martin Community College and to the extent feasible, Bertie County Schools, to sponsor professional development opportunities for educators at our school and in the community. Continuing Education units of credit will be provided to staff for their participation in the scheduled professional development activities.

Heritage Collegiate will use the North Carolina Educator's Evaluation System to evaluate its professional teachers.

The professional development scheduled initially for the school's staff and for subsequent sessions will always focus on the areas identified by the school's leadership and staff in order to develop the teaching skills required by the school and its mission. In addition to the three days of professional development at the beginning of the school year, the school will sponsor at least three half days (early release days for students) of professional development for staff throughout the year. The budget reflects allocations for professional development activities each year.

- 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.*

The core components of the professional development activities will be provided initially during three days at the beginning of the academic year. The professional development provided initially and in the ongoing sessions will focus on helping teachers and support staff to understand the educational programs and instructional strategies teachers are expected to employ in order to meet the needs of the students at the school. Professional development will be offered internally and externally and in partnership with the local educational institutions addressed in item two and in partnership/collaboration with Bertie County Schools, if feasible. Professional development activities will always align with the goals, mission, education programming, budget projections, and school's expectations as well as the needs identified by staff as areas where development is required in order for them to be successful. The needs and focus of the staff's subsequent professional development activities will be determined by the school's instructional leadership team and the school's leadership to be approved by the school's governing board.

- 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 and focus of the professional development activities have been outlined in item 2; however, as stated, professional development at Heritage Collegiate will be planned to address the needs of staff in order to meet the challenging aspect of the curricular programming and the innovative instructional delivery strategies proposed in the educational program. An instructional leadership team will be developed at the school to work with the school's leadership to ensure that the professional development needs of the staff are addressed throughout the academic year.

- 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.*

The school's calendar will reflect the days devoted to professional development. Initially, it will begin with three days at the beginning of the school year and at least 3 half days (early release days for students) as needed throughout the academic year. All professional development days will be noted on the school calendar. The days are reflected on the school calendar and the costs are reflected in the projected budget for the school. The daily schedule will accommodate professional development activities on the three days at the beginning of the school year and the three designated days throughout the academic year. The staffing structure supports all teachers being involved in the professional development activities at the beginning of the school year and on the three designated early release days.

In addition, the school's plan for professional development begins as soon as an individual is interviewed for his/her position. In an effort to determine the potential strengths and areas where development is needed, potential staff will be asked about their skills, interests, qualifications during the interviewing process. The next phase of professional development will occur at the point at which staff is hired. When candidates are given approval for employment, they will be informed that

they will be given copies of three books that they will be expected to read in preparation for employment at Heritage Collegiate: "Teach Like a Champion" by Doug Lemov, "A Practical System for Identifying Gifted and Talented Students" by Joseph S. Renzulli, and "Maximizing Gifted Students Potential in the 21st Century" by Dina Brulles and Susan Winebrenner. In addition, at the beginning of the school year, just prior to school opening, all staff members (including the clerical staff) will come together for at least three days to receive professional development in all areas of determined need in relation to the school's mission and expectations of staff which shall include to review and understand the following: working in a "no excuse" instructional environment and a culture of high expectations for everyone including staff and students, the teaching and assessment of the State's Common Core Standards in ELA and in mathematics, language immersion experiences for students in Spanish and Mandarin Chinese; the Blended Learning Rotational Model; AVID College Preparatory Program; Differentiated Teaching and Learning; A discussion of the three assigned readings; Pyramid of Success character education Services Program by Coach John Wooden; KidLead by Dr. Alan Nelson on teaching students to become leaders; Socratic Seminars, Integrating life coaching strategies for student success; Latin as a component of ELA; Working with English language Learners, Section 504, and IDEA requirements for students with disabilities; Debate Across the Curriculum; Principles of Project-Based and Service-Based Learning; and integrating Critical thinking strategies into instructional delivery. External experts in their respective fields will be brought in initially to direct the professional development and training in areas where no staff is skilled to lead. Paraprofessionals will also be expected to participate in the training. Heritage Collegiate plans to work in partnership/collaboration with East Carolina University, Elizabeth City State University, Chowan University, Martin Community College and to the extent feasible, Bertie County Schools, to sponsor professional development opportunities for educators at the school and in the community. Continuing Education units of credit will be provided to staff for their participation in the scheduled professional development activities.

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 reflect the racial/ethnic and demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-238.29F(g)(5)).

The leadership staff and members of the governing board of Heritage Collegiate will market its program to all families and students within the general Bertie County community and the surrounding areas to ensure that the school begins and remains filled to capacity. The efforts of the marketing team will involve ensuring diversity of the staff and the students at Heritage Collegiate. Marketing strategies will include reaching out to the

entire community to ensure that all ethnic groups within the general area are made aware that the school is in existence and available to serve all students in the Bertie County and surrounding community. Every effort will be made to ensure that the staff and students at the school reflect the ethnic/racial and demographic diversity of Bertie County Schools and the Bertie County community.

The governing board will market to the community using a variety of strategies such as placing public service announcements in local newspapers and with the local cable companies. Also, it will develop pamphlets and other literature about the school to disseminate at local churches, highly attended social functions and events in the community, local day care centers including the Bertie County Preschool Program, and local chapters of prominent sororities and fraternities, and local organizations in the community such as the Chamber of Commerce and the Rotary Club. In addition, announcements will be placed in the local newspaper, on Heritage Collegiate's website and its social media networks including Facebook, Linked-In, and Twitter. In addition, Heritage Collegiate will sponsor "Open-House Events" periodically throughout the year in which members of the community will invited to visit the school and learn what the school's programming entails. Heritage Collegiate's marketing plan will be devised to ensure that all students have equal opportunity for access to the school.

The executive director, the principal, designated members of the advisory council, and a committee of school staff will form the marketing team whose responsibilities will be to further develop the school's plan for marketing to the community and to ensure its implementation.

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.*

1.The staff at Heritage Collegiate will communicate with parents extensively during the marketing, recruitment, and admission processes regarding the school's expectation for parents to volunteer and involve themselves in their children's learning at every phase. The process of involving potential parents has already begun but is expected to intensify once the school is approved and throughout each academic year. Heritage Collegiate's planning team and governing board believe that parents and the school are partners in directing student learning and school activities.

2.Parents, families, and community members will be encouraged to participate in all school events and school celebrations at Heritage Collegiate throughout the academic year including its open house celebrations. In fact, it will be expected that the school's leadership will work with and support the staff in encouraging parental involvement at the school by reaching out to parents/guardians and always making them feel welcome regardless of their reason for being at the school. Parents and community members will be encouraged to volunteer their time and resources at the school though only after a criminal background check has been conducted. Parents will be expected to support the staff and students on community

field trips and other activities sponsored by the school.

Additionally, parents/guardians are expected to attend parent/teacher conferences to discuss setting goals, developing PEPs for students and monitoring students' progress which will be scheduled at publicly announced intervals throughout the year and will appear on the school's academic calendar. Family/teacher conferences will be scheduled to accommodate the schedules of parents with some of them occurring in the evenings to accommodate the work schedules of parents, as needed. For students with disabilities with an Individualized Education Program (IEP) and students requiring Section 504 and English Language Learners (ELL) support, the students parents/guardians will be expected to attend all meetings in which student learning goals are being set and students' progress is being noted and documented towards those goals. Parents and guardians will be reminded frequently that they are partners in developing and creating support for the students' learning and successes.

Heritage Collegiate will have a website in which student information such as homework, special projects, scheduled activities and special events will be posted for the school. In addition, teachers will have specific website designations to support students and parents in their efforts to help students learn and to be successful and to track classroom assignments, designated homework, and other activities.

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.*

Heritage Collegiate is a public (tuition-free) charter school to be established in Bertie County to serve grades K-8 beginning effective with the 2014-15 school year with students enrolled in grades K-3. Any child who is qualified under the laws of North Carolina for admission to a public school in the grades served by Heritage Collegiate is qualified for admission to the school. Heritage Collegiate does 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. In order for students to enroll at Heritage Collegiate, parents/guardians must complete an Application for Admission, and provide 1) a copy of the child's birth certificate, 2) the child's immunization record, 3) the child's social security number, 4) proof of address, and 4) records transferred from the previous school, if applicable.

1. For the 2014-15 school year, Heritage will have an open application period that begins on January 1, 2014 and will end on May 31, 2014. During the enrollment period, Heritage will agree to enroll any student whose parents/guardians submit a valid application during the application period, unless the number of applications exceeds the capacity of the school or the

expected assigned grade. If the number of applications exceed the school's capacity or the capacity for a grade, a lottery will be held to fill vacant seats for the 2014-15 school year and for subsequent years. Once enrolled, students are not required to reapply in subsequent enrollment periods.

2. Each student applicant will have an index card with their name and grade. The selection process will be by random drawing. Upon filling all available seats, the acceptance by lottery will continue, thereby creating a school's waiting list. Cards for the general waiting list for each grade will be randomly drawn one card at a time, beginning with the lowest grade in the school. The lottery will then proceed for each grade through grade 8, once the school reaches that point. As openings become available at a given grade, students will be admitted based on their current lottery number. If applicants selected for admission decide NOT to enroll at Heritage Collegiate, the parents of the next child on the list for that grade will be notified immediately. Parents of students who are given acceptance by Heritage Collegiate have 15 days to notify the school of their decision regarding the enrollment of their child. Heritage will give enrollment priority annually to siblings of its currently enrolled students. Heritage will give enrollment priority to the children of the school's staff and, for the first year only, its board members providing board members' children do not exceed 10 percent of the total enrollment or up to 20 students, whichever is less. The school's enrollment policy will be specified on the official copy of the school's Application for Admission and in the student handbook.

3. The school's waiting list policy is outlined in number 2. The parents of students at Heritage Collegiate may withdraw or transfer their children at any time. Students' records will be forwarded as official documents to the child's receiving school. In order for parents to re-enroll their students at Heritage at a later time, they must go back through the school's admission process.

4. Heritage Collegiate will limit its pre-enrollment activities to marketing, recruitment, and informational/awareness and open-house sessions during which the school's structure, policies, philosophy, and educational approach are shared with parents/guardians along with questions and answers sessions.

5. The parents of students at Heritage Collegiate may withdraw and transfer their students at any time they feel the school is no longer meeting the educational needs of their child. The student's official records will be transferred to the child's receiving school.

PROJECTED ENROLLMENT 2014-15 through 2018-2019

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Bertie County Schools
 LEA #2
 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 080	LEA 000	LEA 000	LEA 080	LEA 000	LEA 000	LEA 080	LEA 000	LEA 000	LEA 080	LEA 000	LEA 000	LEA 080	LEA 000	LEA 000
Kindergarten	60	0		60	0		60	0		60	0		60	0	
Grade 01	60	0		60	0		60	0		60	0		60	0	
Grade 02	60	0		60	0		60	0		60	0		60	0	
Grade 03	60	0		60	0		60	0		60	0		60	0	
Grade 04	0	0		60	0		60	0		60	0		60	0	
Grade 05	0	0		0	0		60	0		60	0		60	0	
Grade 06	0	0		0	0		0	0		60	0		60	0	
Grade 07	0	0		0	0		0	0		0	0		60	0	
	240			300			360			420			480		

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.

Heritage Collegiate Leadership Academy of Bertie County will make provisions for students enrolled at the school to receive transportation services by using a vendor to contract the services. The school's planning team and the governing board's transportation plan prevents transportation from being a barrier for any student who resides in Bertie County and wants to attend the school. A reasonable number of parents from surrounding areas will need to demonstrate a interest in their students attending Heritage Collegiate in order for the planning team and the governing board to address the issue of transportation for any children outside of the county. Heritage Collegiate will not provide transportation to any student who lives within one and one half miles of the school. A first option for providing transportation is (1) to contract with Bertie County Schools to provide transportation (for a reasonable fee) for students who wish to attend Heritage Collegiate. However, if Bertie County Schools refuses to partner (contract) to provide transportation because it demonstrates there is no available space on its buses, its fees appear to be unreasonable, or it would not be practically feasible for them to provide the transportation, then Heritage Collegiate will seek to provide transportation by (2) contracting privately (using a proposal bidding process) for independent bus transportation services and (3) working with parents/guardians for a plan for carpooling to get students who live in the different communities to and from school. If it becomes necessary for Heritage Collegiate to contract for private bus transportation services, the planning team and governing board will implement a contracted transportation plan in which it will have access to private bus transportation to schedule three bus routes in the three distance areas of the county. Since Bertie has a large area, bus routes will be scheduled in the following manner (1)one for the Merry Hill, Colerain, and Powellsville areas of the county; (2)one for the Aulander, Lewiston, and Askewville areas of the county; and (3) one for the various areas of Windsor including the Indian Woods and Cooper Hill communities of Windsor. It is expected that these contracted transportation services will be contracted from local transportation businesses in the area. Regardless of how transportation will be instituted for Heritage Collegiate, the administrative team and the Board of Directors will comply with the state laws and regulations regarding operating public school transportation set forth by the state and require that the transportation vendor(s) do the same. It is the expectation and commitment of Heritage Collegiate that no child will be denied access to the school due to a lack of transportation. Contracted transportation services to and from the school will be a major line item in the expenditure section of the budget whose costs may fluctuate depending upon factors such as fuel costs, enrollment from the various extended communities, and the number of parents willing to carpool to transport children to and from school.

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.

Heritage Collegiate will contract services to provide the school's child nutrition program using the bidding process. Request for Proposals (RFP) will detail a program that will provide a healthy breakfast and a healthy lunch including lunches for students and staff requiring a special diet. A light healthy breakfast and healthy lunch will be provided to students and the staff. The child nutrition contractor will be accepted based on the lowest bid and the greatest value for the school and the program. An eating area will be designated at the school facility for students and staff. Also, students and staff will be permitted to bring their breakfasts and lunches from home. Because approximately 77 percent (2012-13 data from Bertie County Schools website) of all students attending Bertie County Public Schools receive free/reduced lunch, it is expected that a large percentage of the costs for operating the school lunch program will be reimbursed by the federally-funded Child Nutrition Program. Staff and students not eligible for Free/Reduced lunch will be required to pay the actual costs for breakfast and lunch. Heritage Collegiate will operate its child nutrition program for students in accordance with U.S. Department of Agriculture policy which prohibits discrimination on the basis of race, color, national origin, sex, age, or disability. The governing board of Heritage Collegiate agrees to follow the policies and guidelines set forth in the State Board of Education and North Carolina Department of Public Instruction's Agreement to Administer Federally-Funded Child Nutrition Programs for Charter Schools. Staff will pay for any breakfast or lunch provided per cost and at the time of consumption. The school's leadership will file the necessary paperwork for state/federal reimbursement for students receiving free/reduced lunch, however, an allocation will be noted in the budget to cover the initial layout of funds which are expected to be reimbursed.

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		\$3,817.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$.00
Property Insurance	\$400,000		\$600.00
Motor Vehicle Liability	\$1,000,000		\$181.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other	\$0		\$6,543.00
Total Cost			\$11,473.00

*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.

heritagecollegiate 02/23/2013

(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).

Heritage Collegiate's planning team and governing board's plan for obtaining a building is to seek potential facilities in the Bertie County community mostly evaluating vacant, abandoned, and underused sites in the Windsor community because of its central location in the county. When the proposed charter school application is approved even as a preliminary measure, the planning team for Heritage Collegiate will identify a specific facility and enter into negotiations for the site. In addition, it will provide a description of the facility, the funding required to make the proposed facility education-ready, and evidence from Bertie County inspectors and other facility authorities that the facility selected for use by Heritage Collegiate is safe for school use. No child will be allowed to enter the selected facility until a Certificate of Occupancy for Educational Use has been appropriately filed with the NCDPI Office of Charter Schools.

If it becomes necessary to renovate or make additions to the selected facility, it is understood by the school's planning team and the governing board that such plans are to be reviewed and commented upon by the School Planning Section of the NC Department of Public Instruction. The planning team and the governing board of Heritage Collegiate will follow the stipulations outlined in the North Carolina Public Schools Facilities Guidelines and will use the planning assistance of the School Planning staff, its websites, and its computer-assisted software tools. The planning team at Heritage Collegiate understands that it must evaluate any potential facility on the basis of it safety and its potential to be used effective as a school to educate students and that it must meet the same health and safety requirements required of Bertie County Schools. The planning team

and the governing board at Heritage Collegiate are currently prioritizing its facility search in the following manner: 1) partner/collaborate with Bertie County Schools to share underused public school facilities in the county (especially since a new central high school is being built in the county,) 2) lease and renovate a vacant or abandoned public school facility in Bertie County, 3) lease a vacant public building in Bertie County that belongs to the federal, state, county, or local government, or 4) lease a vacant/abandoned non-public facility in the county that is located in or close to the town of Windsor. A last resort will be to acquire funds by borrowing from a financial institution such as the Self-Help Credit Union to build a modular facility on donated/purchased land to serve as a school facility for Heritage Collegiate.

The acquisition of a facility and its maintenance are major line items in the school's annual budget.

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

The planning team and the governing board of Heritage Collegiate Leadership Academy have not yet identified a specific facility for its use as an educational facility. Although, several vacant/abandoned/underused sites in Windsor, the center of the county, have been evaluated as potential sites, no negotiations are underway for a specific site at this time. The planning team and the governing board of Heritage Collegiate plan to have access to a facility in ample time to begin school in August 2014, once the charter is approved. The planning team and the governing board are willing to begin with a smaller facility initially that will house K-5 or one that is large enough to accommodate the number of students expected in the first three years, with a long-term plan of moving the operation to a larger facility, after three years, that is large enough to accommodate the full projected enrollment and staff. Physical Education, especially during winter months, is one area in which the school will be challenged to offer if an appropriate facility is not found in time for school opening in the fall of 2014.

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

<p>SHOW CALCULATIONS FOR FIGURING STATE AND LOCAL DOLLARS FOR THE PROPOSED CHARTER SCHOOL</p> <p><i>The formula for figuring these allotments can be found in the <u>Resource Manual Finance Section.</u></i></p>	<p>See Charter School Dollars per ADM on the following link for per pupil allotments by county. http://dpi.state.nc.us/fbs/allotments/support/</p> <ul style="list-style-type: none"> • 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. <p>For local funding amounts, applicants will need to contact their local offices or LEA.</p>			
	<p>LEA #1080 - Bertie County Schools</p>			
	Revenue	2012-2013 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2014-2015
	State Funds	\$6,232.11	240	\$1,495,706.40
	Local Funds	\$1,100.00	240	\$264,000.00
Federal EC Funds	\$3,328.64	24	\$79,887.36	
Totals			\$1,839,593.76	

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	\$79,887	\$99,859	\$119,831	\$139,803	\$159,775
-Local Per Pupil Funds	\$264,000	\$330,000	\$396,000	\$462,000	\$528,000
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-State ADM Funds	\$1,495,706	\$1,869,633	\$2,243,560	\$2,617,486	\$2,991,413
-Working Capital*	\$0	\$0	\$0	\$0	\$0
TOTAL INCOME	\$1,839,593	\$2,299,492	\$2,759,391	\$3,219,289	\$3,679,188

***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		
	# Staff	Salary per	Total salary	# Staff	Salary per	Total salary	# Staff	Salary per	Total salary	# Staff	Salary per	Total salary	# Staff	Salary per	Total salary
Personnel:															
Executive Director	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000
Principal	1	\$65,000	\$65,000	1	\$65,000	\$65,000	1	\$65,000	\$65,000	1	\$65,000	\$65,000	1	\$65,000	\$65,000
Assistant Principal	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	1	\$58,000	\$58,000	1	\$58,000	\$58,000
Dean Of Student Services	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	1	\$58,000	\$58,000	1	\$58,000	\$58,000
Student Services Counselor	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$50,000	\$50,000	.5	\$50,000	\$25,000	.5	\$50,000	\$25,000
Financial/Data Assistant	1	\$25,000	\$25,000	1	\$25,000	\$25,000	1	\$25,000	\$25,000	1	\$25,000	\$25,000	1	\$25,000	\$25,000
Administrative Assistant	1	\$20,000	\$20,000	1	\$20,000	\$20,000	1	\$20,000	\$20,000	1	\$20,000	\$20,000	1	\$20,000	\$20,000
Core Content Teacher(s)	12	\$35,000	\$420,000	15	\$35,000	\$525,000	18	\$35,000	\$630,000	18	\$35,000	\$630,000	18	\$35,000	\$630,000
Mathematics Teachers	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	3	\$35,000	\$105,000	6	\$35,000	\$210,000
Ela/Social Studies Teacher(S)	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	3	\$35,000	\$105,000	6	\$35,000	\$210,000
Exceptional Children Teacher(s)	1	\$35,000	\$35,000	2	\$35,000	\$70,000	2	\$35,000	\$70,000	2	\$35,000	\$70,000	2	\$35,000	\$70,000
Physical Education Teacher	1	\$35,000	\$35,000	1	\$35,000	\$35,000	1	\$35,000	\$35,000	2	\$35,000	\$70,000	2	\$35,000	\$70,000
Technology/Media Support Coordinator	1	\$38,000	\$38,000	1	\$38,000	\$38,000	1	\$38,000	\$38,000	1	\$38,000	\$38,000	1	\$38,000	\$38,000
Technology/Media Assistant	.5	\$25,000	\$12,500	.5	\$25,000	\$12,500	.5	\$25,000	\$12,500	1	\$25,000	\$25,000	1	\$25,000	\$25,000
Spanish Teacher	.5	\$35,000	\$17,500	.5	\$35,000	\$17,500	.5	\$35,000	\$17,500	1	\$35,000	\$35,000	1	\$35,000	\$35,000
Art Teacher	.5	\$35,000	\$17,500	.5	\$35,000	\$17,500	.5	\$35,000	\$17,500	1	\$35,000	\$35,000	1	\$35,000	\$35,000
Music Teacher	.5	\$35,000	\$17,500	.5	\$35,000	\$17,500	.5	\$35,000	\$17,500	1	\$35,000	\$35,000	1	\$35,000	\$35,000
Teacher Assistants	3	\$21,000	\$63,000	3	\$21,000	\$63,000	3	\$21,000	\$63,000	3	\$21,000	\$63,000	3	\$21,000	\$63,000
School Nurse	.5	\$35,000	\$17,500	.5	\$35,000	\$17,500	.5	\$35,000	\$17,500	.5	\$35,000	\$17,500	.5	\$35,000	\$17,500

Heritage Collegiate Leadership Academy

Total Personnel	25.5	\$569,000	\$913,500	29.5	\$569,000	\$1,053,500	32.5	\$569,000	\$1,158,500	43	\$755,000	\$1,559,500	49	\$755,000	\$1,769,500
Benefits:	<i># Staff</i>	<i>Cost Per</i>	<i>Total</i>	<i># Staff</i>	<i>Cost Per</i>	<i>Total</i>	<i># Staff</i>	<i>Cost Per</i>	<i>Total</i>	<i># Staff</i>	<i>Cost Per</i>	<i>Total</i>	<i># Staff</i>	<i>Cost Per</i>	<i>Total</i>
Employee Benefits	23	\$5,500	\$126,500	27	\$6,000	\$162,000	30	\$6,500	\$195,000	42	\$6,500	\$273,000	48	\$7,000	\$336,000
Professional Development	25.5	\$800	\$20,400	29.5	\$700	\$20,650	32.5	\$600	\$19,500	43	\$600	\$25,800	49	\$600	\$29,400
Staff Supplements	18	\$1,200	\$21,600	22	\$1,200	\$26,400	25	\$1,200	\$30,000	36	\$1,200	\$43,200	42	\$1,200	\$50,400
Total Benefits	66.5	\$7,500	\$168,500	78.5	\$7,900	\$209,050	87.5	\$8,300	\$244,500	121	\$8,300	\$342,000	139	\$8,800	\$415,800
Total Personnel Budget	92	\$576,500	\$1,082,000	108	\$576,900	\$1,262,550	120	\$577,300	\$1,403,000	164	\$763,300	\$1,901,500	188	\$763,800	\$2,185,300

***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	Assessment Materials	\$3,500	\$4,000	\$4,500	\$6,000	\$6,500
	Instructional Materials And Supplies	\$38,000	\$50,000	\$55,000	\$70,000	\$80,000
Human Resources Costs	Financial Audit	\$0	\$5,000	\$6,000	\$7,000	\$8,000
	Financial/Data Management Services	\$80,000	\$90,000	\$110,640	\$135,000	\$150,000
	Legal Counsel	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
	Program Evaluation	\$0	\$6,000	\$0	\$0	\$6,000
Other	Contracted Child Nutrition Services	\$25,000	\$30,500	\$35,000	\$45,000	\$50,000
	Contracted Teaching Services-Mandarin	\$17,500	\$17,500	\$17,500	\$17,500	\$17,500
	Contracted Transportation Services	\$45,000	\$55,000	\$60,000	\$75,000	\$90,000
	Insurances	\$11,473	\$15,000	\$17,000	\$19,000	\$20,000
	Marketing Plan	\$500	\$500	\$800	\$1,000	\$1,000
	Travel Expenses	\$1,400	\$1,500	\$1,500	\$1,800	\$2,000
Rents And Debt Services	Contracted School Maintenance Services	\$25,800	\$32,000	\$36,000	\$45,000	\$60,000
Rents and Debt Services	Extermination	\$900	\$900	\$900	\$1,000	\$1,000
	Facility Lease/Mortgage	\$115,000	\$150,000	\$200,000	\$260,000	\$310,000
	Maintenance	\$500	\$500	\$500	\$600	\$800
	Security/Alarm	\$900	\$900	\$1,000	\$1,000	\$1,200
Technology Technology Hardware	Computer Hardware	\$40,000	\$50,000	\$60,000	\$70,000	\$80,000
	Instructional Software	\$15,000	\$15,000	\$15,000	\$30,000	\$35,000
	Network/Internet	\$1,200	\$1,200	\$1,200	\$2,500	\$2,800
	Office Software	\$1,600	\$1,600	\$1,600	\$2,500	\$2,750
Utilities	Utilities	\$12,000	\$14,000	\$16,000	\$25,000	\$30,000
	Total Operations	\$438,273	\$544,100	\$643,140	\$817,900	\$957,550

***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)	\$1,082,000	\$1,262,550	\$1,403,000	\$1,901,500	\$2,185,300
TOTAL EXPENDITURE (OPERATIONS)	\$438,273	\$544,100	\$643,140	\$817,900	\$957,550
TOTAL EXPENDITURES	\$1,520,273	\$1,806,650	\$2,046,140	\$2,719,400	\$3,142,850
TOTAL REVENUE	\$1,839,593	\$2,299,492	\$2,759,391	\$3,219,289	\$3,679,188
ANNUAL NET PROJECTIONS	\$319,320	\$492,842	\$713,251	\$499,889	\$536,338

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

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

- 1. 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 budget projections for Heritage Collegiate are based on a variety of methods. First of all, some projections were based on information (costs per student) received from current operators of existing charter schools. In some cases, actual costs are being projected based on information from the vendors. For the instructional programs such as KidLead, AVID, assessment materials, the insurance estimates, and the financial audit, etc., the costs are the actual costs quoted by the vendor. In other cases, costs are projected based on the cost percentages provided by operators of existing charter schools.

The projected personnel expenditures are based on the following strategies: for administrators such as the executive director, principal, assistant principal, dean of students, and counselor, the amount of the salary is based on the highest salary the school is expected to pay to a person employed in those positions. For teachers and other professional staff, the salary is based on the average salary of teachers with the expectation that based on years of experience and credentials using the State salary schedule, some teachers will make more and others will make less and that the average should be approximately \$35,000. Heritage Collegiate plans to use the NC State Salary to set the salary for all professional staff. The part-time teacher that will be hired to teach Mandarin Chinese will be contracted using services involving remote learning. The overall personnel expenditures are to stay within a budget allocation to reflect no more than 60 percent of the total revenue for that year. Bertie County Schools indicates that their personnel expenditures represent approximately 57 percent of their annual revenue.

If the budget projections are lower than anticipated, Heritage Collegiate will adjust its expenditures accordingly. For instance, a revised budget plan will be created during the planning year that is based upon the revised projected enrollment and exact costs negotiated with vendors once the charter is approved. The budget will be monitored continuously to ensure that it fits with the projected enrollment/registrations and the projected revenue as of the preliminary enrollment data collected in the summer 2014. Heritage Collegiate will create its budget to ensure that the school's operations are sound and that it is able to meet the educational needs of the students who are expected to enroll. For instance, if fewer students

enroll than what is projected, it will be necessary to hire fewer core teachers and it will be necessary to reduce some of the other expenditures that have per student costs. The budget will be monitored and adjusted frequently to meet the operational needs of the school and the educational needs of the students enrolled always with the goal of "operating in the black".

Note: Part-time positions are noted in the budget line items for personnel expenditures as .50.

- 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*

Heritage Collegiate proposes to contract with Charter Success to manage the school's financial operations such as payroll, check writing (not signing), invoicing, accounting, purchasing, State financial reporting, principal's report, the billing of Bertie County for local funds, local, State, and federal financial reporting and the calculation of required local, state, and federal taxes, and the payment of insurance as well as assisting the school's leadership with the creation of the annual budget. Also, it will assist the school's leadership with the monthly and annual financial reports to the governing board and the financial audits that are to be conducted annually by an external CPA firm. Also, Charter Success will be responsible for managing the student information data and the generation of reports required for local, State, and federal accounting and accountability. Charter Success is located at 1 Stoneglenn Court, Durham, North Carolina 27712. The firm's telephone number is (919) 413-3892. Cory Draughon is the manager of the firm.

Charter Success will work with the on-site financial/data assistant and the leadership at Heritage Collegiate to ensure that all of the school's financial and student information data are generated, monitored, and reported accurately and timely to the proper authorities. A monthly financial and student information data report will be provided to the governing board. Charter Success will generate all required financial and student information data reports and will ensure that copies are properly stored and are accessible by the school's leadership and/or designated staff.

If for some reason, it becomes necessary to terminate the services of the financial contractor, all financial and student information data records for Heritage Collegiate will be provided to the financial entity or to the school as designated by the governing board. The school's leadership will select and the governing board will approve the financial contractor as well as all other contractors hired to provide services to the school regardless of whether the services are those of a part-time teacher, an entity providing transportation services, an entity providing child nutrition services, a individual providing school maintenance services, or a person providing a one-time consulting service. The school's leadership will submit Requests for Proposals (RFP) for services and select the bid that represents the lowest bid and/or the best value for the school. The school's contract committee, which consists of the school's leadership, will evaluate proposals and make a recommendation to the governing board which has the final authority to approve all selections and any subsequent contracts.

- 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.

Heritage Collegiate has established its spending priorities to align with the school's mission, its curricular offerings, its plans for hiring professional and competent staff, its plan for student transportation, its plan for child nutrition, and its professional development needs. The overall budget for the school is depicted in the Overall Budget Section of the application. The planning team has established a budget that is responsible and has a contingency reserve that falls between 15-26 percent of each annual budget to insure that non-state funds are carried over across the summer and into the fall of the following year and to allow for some unknowns that may be related to expenditures such as facility. The budget has also been established using sound fiscal practices with a goal to operate "in the black" while at the same time meeting the operational needs of the school and the educational needs of the staff and the students. The leadership at Heritage Collegiate will provide daily and weekly oversight of the school's budget. A system of checks and balances will be provided by the level of monitoring provided internally and externally. All spending priorities will be set based on the school's mission, the designated curricular programs, professional development needs, and other services outlined in this application and plan for this charter school. The school's plan of operation will be monitored closely and cautiously to ensure that expenditures align with the school's plan of operation and priorities in terms of the school's programming and offerings balanced by projected revenue based on the number of students who actually register and enroll as well as the number of students with disabilities who enroll in the school. The budget is a key component in determining the success of the school and, as such, the school will strive to ensure that it maintains a small contingency reserve each year.

- 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.*

Once the charter for Heritage Collegiate is approved, the planning team and governing board will submit the 501(c)(3) immediately to receive a non-profit status. From there, the planning team and governing board will conduct a series of fundraisers such as grant writing, raffles, seeking foundation and private donors' support, yard sales, and other ventures to raise funds to generate capital for the school prior to receiving ADM funds from the state. These fundraising strategies will continue each year to provide supplemental funds for the school to finance some of the school's celebrations, field trips, and other activities in addition to ensuring that there is a small contingency reserve available annually.

- 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?*

Heritage Collegiate's contingency plan to meet the financial needs of the school is to conduct numerous fundraising events including applying for grants and to seek foundations and private donors to help the school to remain solvent until it is able to reach its projected student enrollment. After hearing from existing charter schools in NC to expect low enrollments the first two years, the planning team and governing board members are

anticipating that this will be one of their challenges, especially for the first two years. This is one of the reasons why the planning team is seeking to apply for its non-profit status immediately after learning that its charter has been approved to provide ample time to conduct numerous fundraising events to provide supplemental revenue for the school. In addition, the leadership will re-evaluate its staffing projections to ensure that they are consistent with the needs of the school based on its actual registration and enrollment.

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

The year one cash flow contingency plan involves applying for a loan with the Self-Help Credit Union in Durham NC to support the initial start up of the school in the event that revenue projections from other sources do not meet the immediate need to enable Heritage Collegiate to move forward with acquisition (rent, lease, purchase) of a facility, school furniture, the hiring of leadership staff, setting up a plan for transportation, child nutrition, and school maintenance to facilitate the opening of the school according to the designated schedule. In addition, the planning team and governing board will monitor student registrations carefully and continuously to ensure that actual staffing in the first year does not exceed the needs of the school based on the actual enrollment.

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.

Heritage Collegiate is committed to following transparent and sound financial practices for all revenue received and all expenditures. Consistent with this commitment and in response to GS115-238.29F.(f)1., Heritage Collegiate will contract with a Certified Public Accountant (CPA) to have an annual independent financial audit conducted in accordance to auditing standards set by North Carolina General Statute. An independent financial auditor/certified public accountant, approved by the North Carolina Local Government Commission (GCC), to conduct the annual independent financial audit will be selected by the governing board. The audits will be conducted each year after the end of the previous fiscal year. It is expected that the first financial audit will be conducted effective in the summer/fall of 2015 for the 2014-15 fiscal year ending June 30, 2015.

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 name of the firm that has verbally agreed to conduct the financial audit for Heritage Collegiate is as follows: Petway, Mills, and Pearson (Phyllis Pearson), Post Office Box 1036, 1014 North Arendell Avenue, Zebulon, North Carolina 27567, telephone: (919) 269-7405, Fax (919) 269-8728.

This firm has been approved by the NC Local Government Commission and has previously conducted audits for charter schools in North Carolina.

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 Heritage Collegiate Leadership Academy (*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: heritagecollegiate

Board Position: Kashi Nelson, Lead Applicant

Signature: _____

Date: 02/28/2013

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

Notary Public

Official Seal

My commission expires: _____, 20____.