



NORTH CAROLINA CHARTER SCHOOL APPLICATION

James Madison 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.

TABLE OF CONTENTS

I.	<u>APPLICATION CONTACT INFORMATION</u>	4
	<u>Grade Levels Served and Total Student Enrollment:</u>	4
II.	<u>MISSION and PURPOSES</u>	6
	<u>Mission:</u>	6
	<u>Educational need and Targeted Student Population of the Proposed Charter School:</u>	6
	<u>Purposes of the Proposed Charter School:</u>	8
	<u>Goals for the Proposed Charter School:</u>	9
III.	<u>EDUCATION PLAN</u>	11
	<u>Instructional Program:</u>	11
	<u>K-8 Curriculum and Instructional Design:</u>	11
	<u>Special Programs and "At-Risk" Students</u>	13
	<u>Exceptional Children</u>	16
	<u>Student Performance Standards</u>	19
	<u>Student Conduct:</u>	20
IV.	<u>GOVERNANCE, OPERATIONS and CAPACITY</u>	22
	<u>Governance:</u>	22
	<u>Governance and Organizational Structure of Private Non-Profit Organization:</u>	22
	<u>Proposed Management Organization (Educational Management Organization or Charter Management Organization)</u>	26
	<u>Private School Conversions: complete</u>	27
	<u>Projected Staff:</u>	27
	<u>Staffing Plans, Hiring, and Management</u>	27
	<u>Staff Evaluation and Professional Development</u>	29
	<u>Enrollment and Marketing:</u>	30
	<u>Marketing Plan</u>	31
	<u>Parent and Community Involvement</u>	32
	<u>Admissions Policy</u>	33
	<u>PROJECTED ENROLLMENT 2014-15 through 2018-2019</u>	35
	<u>Transportation Plan:</u>	36
	<u>School Lunch Plan:</u>	36
	<u>Civil Liability and Insurance</u>	36
	<u>Health and Safety Requirements:</u>	37
	<u>Facility:</u>	37
	<u>Facility Contingency Plan:</u>	37
V.	<u>FINANCIAL PLAN</u>	
	<u>Budget: Revenue Projections from each LEA 2014-15</u>	38
	<u>Total Budget: Revenue Projections 2014-15 through 2018-2019</u>	39
	<u>Personnel Budget: Expenditure Projections 2014-15 through 2018-2019</u>	40
	<u>Operations Budget: Expenditure Projections 2014-15 through 2018-2019</u>	42
	<u>Overall Budget:</u>	43
	<u>Budget Narrative:</u>	43
	<u>Financial Audits:</u>	45
VI.	<u>AGREEMENT PAGE</u>	
	<u>LEA Impact Statement:</u>	46
	<u>Applicant Signature:</u>	46

I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: James Madison 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: *James Madison Academy, Inc.*

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: *Norman George*

Title/Relationship to nonprofit: *Board Member*

Mailing address: 6417 Chapman Court
Raleigh NC 27612

Primary telephone: 919-608-3593 Alternative telephone: 919-608-3594

E-Mail address: ngeorgel@nc.rr.com

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

County: WAKE

LEA: 920-Wake 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? James Madison Academy, Inc.

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,01,02,03,04,05,06	729
Second Year	K,01,02,03,04,05,06,07	829
Third Year	K,01,02,03,04,05,06,07,08	929

Fourth Year	K,01,02,03,04,05,06,07,08	929
Fifth Year	K,01,02,03,04,05,06,07,08	929
Sixth Year	K,01,02,03,04,05,06,07,08	929
Seventh Year	K,01,02,03,04,05,06,07,08	929
Eight Year	K,01,02,03,04,05,06,07,08	929
Ninth Year	K,01,02,03,04,05,06,07,08	929
Tenth Year	K,01,02,03,04,05,06,07,08	929

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.

jamesmcharter

Signature

jamesmcharter

Printed Name

Norman L. George III, Lead Applicant

Title

03/01/2013

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:

James Madison Academy offers the families in Wake and surrounding counties an education experience for their children that will emphasize building strong moral character and excellence in academics. This is accomplished through a dual focus on both the intellectual and physical development of the child with high academic standards and an athletic program that challenges and improves each child.

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.*

Note: The education program described herein is deemed by the applicants Board to meet the need of the targeted student population in Chatham County. A member of the applicant Board, Norman George, is also a member of three other applicant Boards currently seeking charter approval. These other charter applicants are New Hope Charter School (Chatham County), Pinnacle Charter School (Durham County), and Frontier Academy (Union County). Since Mr. George is the lead applicant for each Board and primary drafter of each application, the education program described is identical to that being adopted by the three other applicant Boards.

Wake County has a population of approximately 965,060. The racial makeup of is predominately White, then Black and finally Hispanic. The achievement gap among races and ethnicities is a problem facing the nation. Our school will reside in Wake County a populous county with a diverse demographic, which will allow a more broad spectrum of students from all races and ethnicities to be reached with a quality education.

The traditional public school system was designed for a 19th Century agricultural society. It was successful for that day and age as the majority of children lived in rural areas and that level of education was adequate to prepare them for work and their role as citizens. However, with the advent of the Industrial Revolution and the new Information Revolution, the world is not as large as it once was. Our society has drastically changed and now our expectations for schools must change also. In times past, there was very little school choice available to children except for those from families with the finances to pay private school tuition. Children went to a school as determined by their zip code or the street where they lived. Today, in what is a true grass roots effort, parents are

pushing for more options for their children. Parents and educators recognize that a "one-size fits-all" school does not fit the needs of all students. Given the economic realities of the global economy, parents want their children to have more opportunities than they themselves had and they know a quality education is essential for that to occur. Furthermore, today we are living in a global economy. The current generation of students will not just compete on a local, state or even national level. They must compete internationally. Technology has changed the world dramatically; many jobs that were once tied to a city, state or region are now able to be located in another city or state and even another country. It is imperative the United States meet and exceed the educational results achieved by other countries so that American students of all races and ethnicities can be ready for the challenges of a global economy. Please see Appendix S for additional information on United States academics compared to the world.

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

The total enrollment for James Madison Academy is projected to be approximately 929. Wake Countys Average Daily Membership allotment is 150,544. 929 students would impact the LEA at only 0.62%.

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

The education plan described herein includes curriculum from the Core Knowledge Sequence which is used by charter and traditional public schools in North Carolina and in other states. However, James Madison Academy is not modeled specifically after any one of those. This application is similar to those proposed by other Athlos affiliated applicant Boards. While the educational plan utilizes the Core Knowledge Sequence, we do not intend to be an official Core Knowledge school. Many other schools such as traditional public schools also utilize the Core Knowledge Sequence, but are not Core Knowledge schools.

The Core Knowledge Sequence is defined as "a detailed outline of specific content and skills to be taught in language arts, history, geography, mathematics, science, and the fine arts. As the core of a schools curriculum, it provides a coherent, content specific foundation of learning, while allowing flexibility to meet local needs." Core Knowledge is content specific, coherent, cumulative and content rich. The specificity of the Core Knowledge Sequence distinguishes it from other curricula. By clearly specifying important knowledge in language arts, history, geography, math, science, and the fine arts, the Core Knowledge Sequence presents a practical answer to the question, "What do our children need to know?" While most provide general guidelines concerning skills, they typically offer little help in deciding specific content. The specific content in the Core Knowledge Sequence also provides a solid foundation for skills instruction. Additionally, because the Sequence builds knowledge systematically year by year, it helps prevent repetitions and gaps in instruction that can result from vague curricular guidelines.

James Madison's educational program will include The Writing Road to Reading program by Spalding Education and the Saxon Mathematics program. Both are strong core subject programs that fully support and powerfully implement Core Knowledge. Participation will also be encouraged in academic

competitions and extracurricular activities such as Student Council and math & science clubs. Core Knowledge meets and exceeds the North Carolina Essential Standards and the Common Core Standards. The Writing Road to Reading program and Saxon Math are also both aligned to the Common Core Standards.

We believe that there are universally important civic and ethical virtues that are the foundations of a free and democratic society, such as respect, responsibility, trustworthiness, fairness, caring, courage, grit and diligence. We will use the Core Virtues program and resources from the Center for Civic Education, and other resources as appropriate. The Core Virtues program is a non-sectarian, literature-based program aligned to Core Knowledge which provides interesting and meaningful opportunities to cultivate character through the promotion of basic moral, civic, and intellectual virtues. We will reinforce the traits through expectations in the academic curriculum, the character-fitness program and other student leadership opportunities. By relating these character strengths to life lessons when students fall short of academic, fitness, athletic, leadership, and behavior goals and standards, staff will use consistent vocabulary to encourage students to apply these traits to learn from adversity and to recommit to school expectations that is appropriate at each age level.

James Madison Academy has partnered with Athlos Academy to provide an athletic curriculum tailored to students spanning each grade level for 30-60 minutes each day, four times per week depending on grade level. This curriculum will emphasize balance, coordination, technique, relative strength and the introduction of essential muscular movement patterns, all of which are vital to establishing an athletic foundation, injury prevention and a long-term enjoyment of physical activity and exercise. Please see Appendix U for more information.

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.*

James Madison Academy will use the Core Knowledge Sequence to guide its academic program in order to improve student learning (Legislative Purpose #4). While more common in charter schools in North Carolina, it is a major innovation as being a curriculum sequence that is coherent, cumulative and content specific both vertically (i.e. from first to second grade) and horizontally (i.e. from classroom to classroom in the same grade). The Core Knowledge Sequence is researched based and has demonstrated improvement in individual students as well as improvement in entire schools. A study conducted by researchers at Trinity University in conjunction with the Office Research and Evaluation of the San Antonio Independent School District found the following:

Mohegan School (located in the innermost South Bronx serving primarily Latino and African American students): the average improvement per pupil over a school year in the Total Language Arts Battery was more than twice the average improvement in the district. Aside from outperforming neighboring schools, Mohegan's disciplinary problems went down and attendance went up.

Three Oaks Elementary (located in Fort Myers, Florida): a three year longitudinal comparison of Three Oaks and a control group in the district found that although the control school began the study with higher scores, over a three-year period, Three Oaks overtook and surpassed the control school. As measured by the Total Battery of the California Test of Basic Skills, the mean at Three Oaks moved from 94 points below the national mean to a point above it. The standard deviation in students' scores narrowed from 65.77 to 33.64, indicating (as did other measures) that the lowest-performing students were being raised to the mean. Disadvantaged students made the greatest relative improvement. Pupil suspensions dropped to zero and teacher and student attendance increased simultaneously with higher scores on standardized reading tests.

A recent article in the Press Enterprise credits the implementation of Core Knowledge as the direct reason for Bryant Elementary's marked improvement in academics: "Bryant's Academic Performance Index, based on the state's annual standardized tests last spring, shot up 41 points to 814, on a scale of 200 to 1,000 with 800 as the statewide goal. The school made Adequate Yearly Progress goals under No Child Left Behind for the first time in at least seven years" This achievement occurred in just two years after the implementation of Core Knowledge.

For additional information on how athletics has been shown to improve academics, please see Appendix U.

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?*

James Madison Academy will work to ensure all students are well prepared to achieve their fullest potential in college and beyond. Besides the North Carolina state mandated tests, faculty will also utilize data driven testing

such as the Northwest Evaluation Associations (NWEA) MAP test. The results from MAP allows schools to link the RIT scale to the proficiency levels from state assessments and monitor student progress toward the proficiency standards for their states. The MAP test also allows the school to connect state standards to state-aligned MAP tests, as well as connecting state standards and the DesCartes continuum of learning to teacher reports.

- 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.*

Year Goal	EOG Composite Target
2014-15	establish base line at least 70% at or above grade level
2015-16	build growth at least 73% at or above grade level
2016-17	accelerate growth at least 80% at or above grade level
2017-18	continue growth at least 83% at or above grade level
2018-19	continue growth at least 87% at or above grade level

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.

James Madisons K-8 curriculum includes language arts (reading, writing, grammar and usage, drama, poetry, fiction, nonfiction, speeches, sayings, and phrases), world and American history, geography, science (life, earth, and physical), mathematics, visual arts, and music. We will support the Core Knowledge Sequence by specific curricular resources and programs including the Spalding Method, Junior Great Books, and Saxon Math. Core Knowledge, Spalding Method, and Saxon Math are all aligned with the Common Core Standards. The opportunity for participation in academic competitions and extracurricular activities will supplement this curriculum.

The Sequence serves as the foundational planning document in each classroom. Core Knowledge topics are aligned with state and district standards, and curriculum plans are developed for teaching all requisite topics and standards. James Madison will implement Core Knowledge through a multi-year professional development process. Extensive professional development will occur prior to school opening. Faculty and administration will create a school-wide implementation plan. For more information, please see Appendix B.

K-8 Curriculum and Instructional Design:

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

James Madison Academy will be utilizing a developer specializing in charter school development to design the facility. The school facility will be approximately 75,000 square feet in total. The building will be outfitted with Cat-5 (or higher) wiring to allow high-speed internet connections along with some designated wireless access points throughout the facility. The facility will include approximately 42 classrooms that are 850 square feet each to allow ample space for our academic program (the final classroom numbers will be determined as demand dictates). In addition to the classrooms, the building will contain a media/library room, state of the art science lab, music room, and art room. If budgetary constraints allow, we will investigate the possibility of providing SMART Boards in each classroom to fully-integrate technology into the model. A SMART Board is a series of interactive whiteboards that use touch detection for user input such as scrolling, right-mouse click, etc. A projector display is used to display a computers video output on the interactive white board, which then acts as a large touch screen.

Our school will be equipped with a full-sized indoor, climate controlled gymnasium. In addition to the gymnasium, James Madison intends to install a

6,000-9,000 square foot indoor turf training facility that provides more space for our fitness curriculum.

James Madison's kitchen will be a full-sized commercial grade kitchen with the flexibility to cater food in or prepare our own food depending on budget considerations. Next to the kitchen is the cafeteria, which will be 2,400 square feet in size, allowing our students to interact in a spacious environment.

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.

The Core Knowledge Sequence provides the foundation for preparing students intellectually. In order to prepare students, a curriculum must be content specific, coherent, cumulative and content rich. To deliver effective instruction, a first grade teacher must know what is being taught in Kindergarten and in second grade. As discussed earlier, knowledge builds on knowledge. Core Knowledge has a demonstrated history of increasing academic achievement in both public and private schools which is the most important goal in grades K-8.

The Core Virtues curriculum provides the foundation for preparing students characters. In order to develop a strong character students must be provided with an education in basic moral virtues needed to function in a free and democratic society. Students must be educated in foundational virtues such as fairness, courage, respect, kindness, diligence, responsibility, etc. Core Virtues aligns with the Core Knowledge Sequence and provides the intellectual foundation in developing a strong character.

In partnership with Athlos Academy, James Madison will provide students with the tools to develop a fit body. While Core Virtues educates students on virtues, the Athlos Athletic Curriculum is designed so that students develop performance character. For instance, leadership is caught more than it is taught. In order for students to develop this characteristic, they must be provided with actual opportunities to display leadership. For more information on how the Athlos Athletic Curriculum enhances academics, character and a healthy body, please see Appendix U.

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.

All our teachers will employ a cohesive set of research-based instructional methods and approaches, supported through training they will receive from high-quality professional development providers such as the nationally recognized Professional Learning Communities ("PLCs"), Marzano's Instructional Strategies, and Quantum Learning. Additional information regarding PLCs may be found on Appendix V. Our instruction methods include a powerful mix of direct (explicit) instruction, teacher lecture, differentiated instruction, modeling, guided practice, cooperative learning, independent practice, and individualized instruction that increases student engagement and significantly reduces behavioral issues in the classroom. These methods have proven to be effective with a wide range of students,

including those who are currently performing below grade level, English Language Learners, and those students with special needs. The consistent use of these instructional methods and classroom management techniques at all grade levels will provide a strong, predictable, and self-reinforcing component to the overall school culture. This consistency will also continue to provide a foundation of understanding and support with all parents.

We will offer opportunities and employ specific strategies for students who are working above and below grade level. For students working above grade level in mathematics, we will provide opportunities for acceleration. In addition, curriculum differentiation opportunities will be available including targeted and flexible grouping practices. NWEAs MAP test provides teachers with the tools to define flexible groups for instruction and personalized instruction. Curriculum differentiation opportunities will be offered in all classrooms. We will also promote co-curricular and extra-curricular activities such as science fairs, spelling bees, public speaking contests, etc.

Through the PLC collaborative inquiry process, teachers will use data from ongoing assessments to identify the needs of individual students. Shared strategies to improve student learning are developed and implemented collaboratively meeting the needs of students below, at, and above grade level.

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.

James Madison Academy will mirror the Wake County district school calendar. The first and last day of school and vacation days will mirror Wake Countys 2014-2015 school year as well as the instructional days. We desire that our school calendar be similar to the areas traditional public school so that our students remain connected to their respective communities.

In keeping with our mission to assist students developing a healthy life, our daily school schedule differs from traditional schools with the integration of our athletic curriculum where children get 30-60 minutes of exercise a day for four days a week. The fitness program block will be staggered by grade level so that there are typically no more than three small groups at a time in the athletic facility.

For an example of an individual teachers schedule, please see Appendix B.

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.

Effective instruction is the first tier of the James Madison's RTI process. Teachers will utilize a variety of instructional strategies, including flexible grouping, modeling, guided practice, cooperative learning, and independent practice, to address the needs of learners of various levels and modalities. Intervention support, through teachers, paraprofessionals, and computer assisted instruction will be used in level 2 of RTI. In level 3 of RTI, Student Study Teams (SSTs) convene if a series of progressive interventions and scaffolded instruction do not yield appropriate, measurable student progress.

Overview of Intervention Strategies (RTI):

Level 1:

- * Common formative assessments and expectations
- * Regular staff meetings to review student progress
- * Case management system monitored by the Principal
- * Progress reports to parents
- * Staff commitment to provide assistance to students
- * Grading system that focuses on learning
- * Focus on accelerating student progress and meeting student needs
- * Development of Personalized Learning Plan
- * Tutoring

Level 2: Students not progressing with initial strategies are moved into secondary strategies:

- * Tutorial program in classrooms
- * After school tutoring
- * Computer assisted support
- * Mentoring
- * Counseling/parent meetings
- * Case management meetings to closely monitor student progress in intervention

Level 3:

- * Formal SST is held to determine interventions strategies to meet the specified need of the student.

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.

James Madison will initially identify English Language Learners through the student enrollment which will ask the students primary language. To determine ELP (English Language Proficiency) growth and progress, James Madison will use appropriate state testing standards and materials.

The Core Knowledge website provides guidance regarding adapting the Core Knowledge Sequence for English Language Learners. The Core Knowledge Sequence provides the foundation, but the following adaptations will be used as appropriate to assist English Language Learners:

Strategies:

- * Introducing topics
- * Frontloading of information
- * Taking picture walks
- * Concept building
- * Posting labeled visuals
- * Highlighting selectively
- * Brainstorming

- * Using visuals to develop vocabulary

Working with Text:

- * Paraphrasing
- * Using visual enhancement
- * Using chants
- * Using Multi-media presentations (PowerPoint, films, filmstrips, etc.)
- * Using dramatization
- * Conducting reader's theater
- * Reducing non-essential text

Literacy Development/Assessments:

- * Using graphic organizers
- * Using cloze paragraphs (cloze paragraphs are similar to fill-in-the-blank exercises.)
- * Conducting cooperative learning activities
- * Using graphic depictions
- * Conducting shared writing
- * Administering pictorial tests
- * Using frame writing

Additionally the Spalding Methods "The Writing Road to Reading" approach is effective in assisting English Language Learners and students with learning disabilities. The National Reading Panel identified the following components for effective instruction to English Language Learners: (a) phonemic awareness, (b) systematic phonics, (c) vocabulary, and (d) fluency. All of these components are integrated parts of "The Writing Road to Reading" and diagnostic teaching is embedded within making adaptations part of the daily instruction. The Spalding Method website quotes as follows: "Unlike most programs that teach spelling, writing, and reading in separate units, Spalding's integrated instruction reinforces skill and concept acquisition and provides multiple opportunities for practice and application. Word usage, handwriting, and syllable division are taught in spelling and reinforced in the writing lesson. Integrated instruction is especially important for students unfamiliar with the sounds and conventions of spoken and written English."

Throughout the school staff will utilize a range of research based instructional methods that assist English Language Learners. This includes Total Physical Response, and Language Scaffolding and other methods. The schools staff will be using Professional Learning Communities to further innovate teaching strategies for English Language Learners and find other assessment tools to enable ELL teachers to change strategies when necessary. NWEAs Map test will also provide data to assist the school in tracking an individual ELLs progress.

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.

Curriculum differentiation has been shown to significantly improve the quality and quantity of learning for all students. James Madison will utilize curriculum that is differentiated to best meet the needs of each

individual student. This successfully-proven teaching methodology will continue to include acceleration, depth, complexity, and novelty.

* **Acceleration:** The rate at which a student progresses through curricular material may be adjusted over time to reflect a need to move more quickly or a need to give more time in a particular area of study. Teachers will pre-assess to determine which students have already mastered concepts to be taught. Those students who have mastered the concepts currently under study will be given the opportunity to delve more deeply into those concepts.

* **Depth:** Developing a thirst for knowledge in students requires nurturing interests that may not have been previously revealed by a cursory study of a subject. The study of one or more subjects in greater depth than allowed by the core curriculum will increase all students understanding and ignite in some the desire to search even deeper.

* **Complexity:** Many children quickly master being a student. They easily learn to memorize and, to a certain extent, use facts in order to pass tests. True learning and creation of new knowledge requires going beyond and making connections rarely achieved in our classrooms today. Teachers may create environments that foster this type of learning by adding complexity to the core curriculum.

* **Novelty:** Many students come to us with a passion for learning about a particular subject. Encouraging a student to pursue this passion, often with an independent study contract, can lead to the discovery of new knowledge (for the student and sometimes for mankind), as well as the discovery of new passions to be followed. Students will be encouraged to find and follow an interest through an independent study contract.

James Madison will offer opportunities and employ specific strategies for students who are working above and below grade level. For students working above grade level in mathematics, we will provide opportunities for acceleration. In addition, curriculum differentiation opportunities will be available including targeted and flexible grouping practices. NWEAs MAP test provides teachers with the tools to define flexible groups for instruction and personalized instruction. Curriculum differentiation opportunities will be offered in all classrooms. We will also promote co-curricular and extra-curricular activities such as science fairs, spelling bees, public speaking contests, etc.

Through the PLC collaborative inquiry process, teachers will use data from ongoing assessments to identify the needs of individual students. Shared strategies to improve student learning are developed and implemented collaboratively meeting the needs of students at and above grade level. NWEAs Map test will also provide the data for teachers to identify progress and success of students performing above grade level.

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)

Our enrollment form will contain the following question: What special services is your child receiving?

Special Education: Resource (RSP) Special Day Class (SDC)
Speech/Language 504 Attach Most Recent IEP

Please see Appendix W for compliance with Child Find.

James Madison Academy will remain in compliance with the following:

The Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. 1232g; 34 CFR Part 99) is a Federal law that protects the privacy of student education records. The law applies to all schools that receive funds under an applicable program of the U.S. Department of Education.

* FERPA gives parents certain rights with respect to their children's education records. These rights transfer to the student when he or she reaches the age of 18 or attends a school beyond the high school level. Students to whom the rights have transferred are "eligible students."

* Parents or eligible students have the right to inspect and review the student's education records maintained by the school. Schools are not required to provide copies of records unless, for reasons such as great distance, it is impossible for parents or eligible students to review the records. Schools may charge a fee for copies.

* Parents or eligible students have the right to request that a school correct records which they believe to be inaccurate or misleading. If the school decides not to amend the record, the parent or eligible student then has the right to a formal hearing. After the hearing, if the school still decides not to amend the record, the parent or eligible student has the right to place a statement with the record setting forth his or her view about the contested information.

* Generally, schools must have written permission from the parent or eligible student in order to release any information from a student's education record. However, FERPA allows schools to disclose those records, without consent, to the following parties or under the following conditions (34 CFR 99.31):

- * School officials with legitimate educational interest;
- * Other schools to which a student is transferring;
- * Specified officials for audit or evaluation purposes;
- * Appropriate parties in connection with financial aid to a student;
- * Organizations conducting certain studies for or on behalf of the school;
- * Accrediting organizations;
- * To comply with a judicial order or lawfully issued subpoena;
- * Appropriate officials in cases of health and safety emergencies; and
- * State and local authorities, within a juvenile justice system, pursuant to specific State law.

Exceptional Children's Education Programming

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

The Core Knowledge Sequence provides many opportunities to appropriately serve students eligible for services under 504 and IDEIA for special education. Core Knowledge professional development workshops offer information, strategies, and suggested modifications for each grade level. The Day-to-Day Planner includes a CD which outlines some strategies for modifications. To illustrate the flexibility of Core Knowledge, the Core Knowledge website quotes as follows: "Typically, special education is distinguished from standard education in its different emphasis between skill and content instruction. Special Education is fundamentally skill-based in the areas of reading, language, and math, whereas Core Knowledge emphasizes acquisition of content knowledge. While Core Knowledge has some skill-based objectives, the major focus of IEP (Individualized Education Program) goals is skills. Core Knowledge topics encourage and motivate students to develop their skills; it's more interesting to read about stimulating topics rather than the same basals - especially with the need for repetition. Repetition doesn't have to be the same material - but can be the same reading vocabulary used in different selections, for example. Adapting Core Knowledge topics to meet special needs should be a rewarding experience for student and teacher."

The Spalding Method's The Reading Road to Writing is also structured to appropriately serve students with disabilities. The approach is multisensory and diagnostic, providing daily and ongoing opportunities to appropriately serve students eligible for services under 504 and IDEIA.

Through James Madison Academy's partnership with Athlos Academy, Athlos Academy has investigated curriculum adaptations for adaptive physical education for students with special needs. In August of 2001, the Department of Education released a report entitled "Creating Equal Opportunities for Children and Youth with Disabilities to Participate in Physical Education and Extracurricular Activities." The report indicates that physical activity is 4.5 times lower for children with disabilities than their peers without disabilities. The report acknowledges that there is limited understanding on how research for children without disabilities translates into guidance for physical educational programs directed to children with disabilities. However, given that physical activity for

disabled children is so low, it is especially important that special needs children receive physical education instruction. The report recommends that the patterns of teaching must be altered to promote instruction rather than competition to ensure that the individual student is making progress. The school will be appropriately modifying general physical education activities using concepts such as decreasing distance, using lighter equipment, lowering and enlarging targets.

The design, layout and floor plan will be adjusted to accommodate additional special education rooms as appropriate for student needs. Please see Appendix W for more information.

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.

We will instruct students in appropriate age or grade-level mastery of:

* History/Social Studies: Students will understand and apply civic, historical, and geographical knowledge in order to serve as citizens in today's world of diverse cultures.

* Mathematics: Students will develop abilities to reason logically and to understand and apply mathematical processes and concepts, including those within arithmetic, algebra, geometry, and other mathematical subjects which the staff and school governing board deem appropriate.

* Language Arts: Students will demonstrate strong reading, writing, listening, speaking, and presentation skills, in multiple forms of expression (e.g., written, oral, multimedia), with communication skills appropriate to the setting and audience. They will comprehend and critically interpret multiple forms of expression, including literature from various time periods and cultures.

* Science: Students will successfully utilize scientific research and inquiry methods to understand and apply the major concepts underlying various branches of science, which may include physics, chemistry, biology, ecology, astronomy, and earth sciences.

Underlying and utilized throughout each of the above subject areas will be other core skills such as:

* Critical thinking skills: e.g., problem-solving, analyzing, and applying knowledge.

* The ability to effectively use technology.

* Creative expression through various forms of the arts, e.g., music, visual/studio arts, etc.

* Knowledge of pertinent issues of health and the development of physical fitness.

We intend to use Northwest Evaluation Associations MAP test.

NWEA publishes two types of information to empower educators to use assessment data at the state level:

* Scale Alignment Studies

o NWEA has conducted studies to link the RIT scale to the proficiency levels from many state assessments.

o Using this information with NWEA assessments, schools can monitor their students' progress toward the proficiency standards for their states.

* Goal Structures

o NWEA goal structures connect the content from state standards to each reporting area of a state-aligned MAP test.

o Using NWEA Goal Structures, the concepts in Teacher Reports may be directly connected to each state's unique standards as well as the DesCartes continuum of learning.

Any student who is qualified for admission to a North Carolina Public School is qualified for admission to the school. Students will be required, after admission but before matriculation, to provide evidence of the successful completion of the previous school year in the form of a fourth quarter report card, attendance records, and documentation of EOG scores where applicable. A birth certificate and current immunization record will also be required.

A student satisfactorily completing each grades work will be promoted to the next grade. Any decision concerning promotion vs. non-promotion will be made after considering all facts related to a child's development (emotional, physical, and social, as well as intellectual and academic), collected from a wide range of sources throughout the year. We will make every effort not to displace a student who is being retained, but will be on a space available basis. Students are required to demonstrate that they have mastered grade-level expectations in order to be promoted to the next grade. Grade-level expectations are based on the following: scores on achievement tests, teacher evaluation of students abilities and effort, students motivation level, proficiency assessments, parental involvement and family commitment to supporting the students academic achievement, and attendance. When a student is identified as being at risk of retention, parents/guardians will be notified in writing as early in the school year as practical. Parents/guardians shall be provided an opportunity to consult with the teacher(s) responsible for the decision to retain the student.

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.

James Madison Academy offers the families in Wake and surrounding counties an education experience for their children that will emphasize building strong moral character and excellence in academics. This is accomplished through a dual focus on both the intellectual and physical development of the child with high academic standards and an athletic program that challenges and improves each child. In order to develop these qualities, James Madison expects the following of students:

Be Responsible! We will teach the children to respond to life and its issues and problems-not react to it! We want them to become "response-able" so they will grow and learn to "behave themselves" and depend less on outside controls to manage their behavior.

Be Resourceful! We will teach the children to find and use resources that will point them to solutions. Those solutions include the quest for answers to curriculum questions, as well as those found in every day, real-life issues. They will learn that it is okay to ask for help, and it is okay to offer and give help in a school setting.

Be Respectful! We will teach the children about self-respect so they can learn to respect others and property. They will learn that selfishness and self-respect are opposite attributes.

For more information, please see Appendix C Student Handbook.

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: James Madison Academy, Inc.

Mailing Address: 6417 Chapman Court

City/State/Zip: Raleigh NC 27612

Street Address: 6417 Chapman Court

Phone: 919-608-3593

Fax: 919-608-3594

Name of registered agent and address: Entity has not been formed at the time of application submission. The Tax ID number submitted below is only a fictitious one for the sake of completing this on-line application form.

FEDERAL TAX ID: 99-9999999

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
Steven Long	Vice-Chairman	WAKE	Attorney
Norman George, III	Chairman	WAKE	Charter School

			Developer/Operator
John Pullen	Treasurer	WAKE	Financial Advisor
John D. McConnell, III	Secretary	WAKE	Investment Manager
Francis De Luca	Director	WAKE	Non-profit President

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 main responsibility of the Board will be to ensure that the school fulfills the tenets of its charter and its mission. More specifically, the Board will perform all functions essential to governing an effective school and be responsible for its fiscal and academic policies and for meeting the requirements of applicable laws. This includes:

- * Articulating, maintaining and driving the school's mission throughout the entire school

- * Community

- * Holding school administrators, faculty, staff, and other parties engaged by the school in its business and educational activities accountable for the successful operation of the school and its ability to deliver improved academic results

- * Approving academic goals

- * Monitoring performance toward academic and operating goals

- * Reviewing and approving the annual budget, as well as ensuring proper financial procedures are in place and being effectively implemented

- * Appointing officers, delegates or committees as needed

- * Adopting, amending and repealing bylaws as needed

- * Conducting its business, carrying on its operations and exercising its powers as a corporation, and doing so consistent with all appropriate laws regarding ethics and open meetings.

- * Participating with others in any corporation, partnership, limited partnership, joint venture or other association of any kind, or in any transaction on behalf of the school

- * Retaining an independent auditor to conduct an annual audit of the School

- * Retaining independent legal counsel

The Board is responsible to uphold the expectations and goals set forth in

the Charter.

2. *Describe the size, current and desired composition, powers, and duties of the governing board. Identify key skills, areas of expertise, and constituencies that will be represented on the governing board. Explain how this governance structure and composition will help ensure that a) the school will be an educational and operational success; b) the board will evaluate the success of the school and school leader; and c) there will be active and effective representation of key stakeholders, including parents.*

The Board contains five committed Wake County members who have a variety of backgrounds providing the necessary oversight for the governance of a charter school. The Board members contain experienced business persons, including an owner of a non-profit, a member with over 15 years charter school experience, an investment manager, a financial advisor (previously a teacher), an attorney. The varied backgrounds of these members (many of whom are parents as well) will provide James Madison Academy with the guidance and governance needed to run a successful charter school. In addition, the Board members are excited to bring Wake County an additional educational choice. Since charter schools are a product of a very unique marriage between the private and public sectors, the Board members experiences and knowledge will provide the necessary tools to make James Madison Academy a success.

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 schools mission statement was adopted as a response to the need and parent demand our board perceives in Wake County for both a rigorous academic program and a systematic, and effective approach to inculcating and reinforcing the moral character traits and healthy personal habits likely to propel a student to success in school and beyond, and which counteract the negative consequences of moral decay presently having a great impact on American society at large. The Board members contain parents from Wake County and experience business persons. All Board positions have been filled.

4. *How often will the board meet?*

In the first five years, at least once a month and as needed.

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).*

Policy development will be an immediate focus for the Board, and we recognize the need to quickly develop effective policies related to personnel policies, procurement and vendor contract policies, conflict of interest policies and travel and reimbursement policies.

The Board will develop informational packets and policy manuals for new members. The Board will participate in training webinars provided by the Department of Public Instruction, seek advice from local experts and utilize training from the North Carolina Alliance of Public Charter Schools and other like associations. Board training topics will likely include academics, finance, marketing, leadership and governance, partnering with the community, developing parent participation, etc. The Board currently includes members who have over 15 years charter school experience. There is currently no Board Policies draft at this time. The Board will develop this after charter approval.

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.*

From the proposed Bylaws:

A Director shall inform the Board of any direct or indirect conflict of interest which the Director has with regard to any transaction contemplated by the Board (a "Conflict of Interest"). A Conflict of Interest shall exist in Board actions including, but not be limited to, actions concerning a transaction in which the Director: (a) has a material financial interest; or (b) 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 Director with a Conflict of Interest may participate in the discussion, but may not vote on the transaction. The transaction is authorized, approved, or ratified by the vote of a majority of the Directors in office who have no Conflict of Interest (which must be more than one Director) and when a majority of Directors who have no Conflict of Interest so vote, a quorum is deemed to be present at the meeting for purposes of that vote.

The Corporation may not enter into a contract with a related person to the extent such contract and any transfers in connection therewith might cause or imply private benefit under the relevant sections of the Code, and applicable provisions of state ethical requirements for local government officials.

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

Policies will be developed with the support of legal counsel and they will be reviewed and approved at public Board meetings. Policies will be reviewed at least annually. With guidance from legal counsel and by referencing state law, SBOE policies and local regulations, the Board will ensure that the school has all required policies and/or practices and procedures in place, including but not limited to a student code of conduct, Family Educational Rights and Privacy Act (FERPA), special education and ELL student identification and related services, first amendment rights and protections, parent involvement, school safety procedures, and technology use. Policies will be provided to parents and students via the parent/student handbook and/or the school's website.

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.*

The Board will have an advisory council that will consist of parents, business persons, and members of the community to better serve James Madison. The advisory council is an advisory board only and does not have any authority over the school. The contracted service providers listed in the organizational structure are subject at all times to Board authority. The two currently contemplated are School Model Support LLC dba Athlos Academies which will provide the athletic curriculum and the character development program only. Acadia-Northstar is a financial accounting provider with charter school experience that the school will likely contract with. These contracted companies are subject to Board approval and their performance will be evaluated by the Board.

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.

Not Applicable

If the Charter School plans to contract for services with an educational management organization (EMO) or charter management organization (CMO), please specify the contact information below.

Name of the Company: School Model Support LLC dba Athlos Academies
Address: 855 Broad Street, Suite 300
Boise ID 83702
Website: www.athlosacademies.com
Phone Number: 208-938-4358
Contact Person: Christine Johnson
Fax: 208-439-4954
Email: christine@athlosacademies.org

1. Explain how the contract with the specified EMO or CMO will be in the best educational and financial interest of the charter school. Please include a copy of the proposed management agreement as Appendix J of the specified EMO or CMO.

Negotiations are underway with Athlos Academies, but have not yet been consummated. Yet to be determined is the scope of services this Board will contract with Athlos Academies to provide. At present, the scope of services contemplated is limited to provision of the physical education and character development programs, as well as their integration with the scope and sequence of the academic classes.

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

The Board is currently not contemplating other EMOs.

3. Provide and discuss student performance, governance performance and financial data from other schools managed by the management company to demonstrate how this organization is a

good fit for the targeted student population. Nationally, what is the highest and lowest performing school of the EMO/CMO? Why are these two schools so different in overall achievement?

Athlos Academies is a newer organization and the schools they are affiliated with are not yet open at the time of application.

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

The Board understands and insists upon fulfilling its responsibility to oversee school operations. Contract arrangements with the EMO will not remove this responsibility from the Board.

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

Personnel of the charter school will be employees of the Board. The day to day operations these personnel will carry out may be overseen by the EMO depending on the scope of services negotiated in the contract.

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

The Board will review performance of the EMO according to the scope of services negotiated.

7. *Is the facility provided by the EMO/CMO? If so what is the rental cost per square foot?*

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

The facility will not be provided by the EMO. However, the EMO can assist the Board in qualifying the building and financing of the facility with real estate developers.

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.*

James Madison will advertise with local newspapers and will post the employment application on the School website. We will implement a non-discriminate on the basis of race, color, (HR) procedure, which will be fully compliant with the North Carolina state laws and No Child Left Behind. We will not discriminate on the basis of race, color, national origin,

creed, sex, ethnicity, mental or physical disability, age, religion, ancestry or athletic performance in the provision of employment and services. We will practice non-sectarian employment practices. We will require background checks of its employees as required by the applicable laws to ensure the safety of the school and all students. Annual surveys will be completed by school staff to ensure employment satisfaction.

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

The Board of Directors is the legal entity and is responsible for the organization. The Board will govern the organization and provide oversight. The day-to-day management of James Madison Academy is undertaken by the staff of the organization. Please see Appendix L for more information.

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

James Madison Academy will not discriminate on the basis of race, color, national origin, creed, sex, mental or physical disability, age, religion, or ancestry in the provision of employment and services.

Employment verification includes criminal history background checks in addition to reference checks. Employees are required to submit fingerprints in accordance with applicable state law prior to beginning work. All offers of employment are contingent upon satisfactory results of these employment screening processes. James Madison Academy reserves the right to periodically update the background check records for employees. Failure to complete a fingerprint background check in accordance with state law or receipt of an unsatisfactory result may result in termination of employment.

It is James Madisons policy that we will not discriminate against qualified individuals with disabilities with regard to any aspect of their employment. James Madison Academy recognizes that some individuals with disabilities can perform the essential functions of a position with reasonable accommodations made at work. Reasonable accommodations will be made to enable essential functions of the job.

Please see Appendix L for more information.

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

The proposed annual salary range is \$25,000 to \$75,000. The board plans to offer the same benefits to all levels of employment, including health insurance, and a private retirement plan.

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

If complaints cannot be resolved informally, employees may file a written complaint with the Principal as soon as possible after the events that give rise to the employees work-related concerns. The written complaint should set forth in detail the basis for the employees complaint.

An objective and timely investigation of all complaints, which cannot be resolved informally, will be undertaken. This includes meeting separately with the employee and with others who either are named in the complaint or who may have knowledge of the facts set forth in the complaint. James Madison Academy will attempt to treat all internal complaints and their investigation as confidential, recognizing, however, that in the course of investigating and resolving internal complaints some dissemination of

information to others may be necessary or appropriate. Upon completion of the investigation, the Principal shall report the finding(s) to the employee in writing. If warranted, Administration will bring both parties to engage in the Dispute Resolution Process.

Mediation is conducted on the basis of the following points:

- o Identifying both parties needs and interests.
- o Generating alternatives and solutions.
- o Choosing a solution that provides maximum joint benefit.
- o Enforcing non-retaliation.

If an employee has filed a complaint in good faith, the employee will not be disciplined or otherwise penalized for lodging the complaint. If an employee believes that he or she is being retaliated against for lodging a complaint, the employee should immediately notify the Principal or the Business/Personnel Office.

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

No positions are planned at this time that fit this description.

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

The board intends to hire a certified EC coordinator to oversee services given to EC students, ELL and gifted students. EC teachers will be on staff to provide services, and other personnel with the necessary skills and certification may be contracted to meet student needs in accordance with state and federal law.

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 Principal and Assistant Principal will possess teaching and administrative licensure from the State of North Carolina. Teachers will possess the following minimum teaching credentials: Bachelor of Arts or Science, Certification appropriate to the grade level in which duties and responsibilities are required, Secondary Teachers will have a subject matter concentration in the area of teaching responsibility. It is anticipated that as many as teachers as possible will be employed who possess a graduate degree.

Teacher assistant: A minimum of two years of post high school education and/or commensurate experience in skill development through prior employment as a teacher assistant for a period of five years.

Clerical: A minimum of two years post high school education and/or commensurate experience in skill development through prior employment as a school office employee.

Custodial: A minimum requirement of a high school education and/or commensurate work experience in skill development through prior employment as an institutional custodian or maintenance employee will be required.

Staff Evaluation and Professional Development

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

A professional employee must hold at all times a valid North Carolina

license appropriate to the position in which he or she is employed. Licensure renewal is the responsibility of the individual, not of the school.

- 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.*

Each employee will receive performance reviews conducted by his or her supervisor. Performance evaluations will be conducted at least annually, prior to the end of the school year. All teaching staff will undergo frequent observations by the Principal throughout the school year. The frequency of performance evaluations may vary depending upon length of service, job position, past performance, changes in job duties, or recurring performance problems. Teachers participate in an interactive evaluation process. Details about the nature of this process are available through the Principal. A summary of employee reviews will be provided to the Board annually. State and federal privacy laws will be complied with.

- 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.*

A high performing school has clarity of mission and all employees are committed to that mission, and are provided the tools they need to be successful. There will be significant professional development prior to the opening of the school year and ongoing professional development during the school year. High performing schools have both a shared collaborative culture and competence in curriculum and instruction. The initial focus of the implementation of both Professional Learning Communities and Core Knowledge will be the foundation for collaborative culture and competence in curriculum and instruction. These foundations will be enhanced with additional professional development in the use of the Spalding Language Arts program and Saxon Math (all aligned with Common Core Standards). A comprehensive multi-year professional development plan will be developed prior to the opening of school that addresses the needs of all staff, as well as provides a framework for the personal development of individual teachers.

- 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.*

Please see Appendix X for detail on Core Knowledge professional development that takes place prior to school opening.

- 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.*

Total teacher contract days will be determined at a later date, but it is expected that they will include professional development days. We are also planning for additional stipend days prior to the schools opening that will focus both on building a strong school culture and preparing for the opening of a new school.

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)).

Building effective community partnerships will be a key component of a successful marketing strategy. Immediately upon approval of this application, James Madison will reach out to local political, community, faith-based and corporate leaders to generate awareness of our innovative program. The day after this application is approved we will issue a press release announcing the approval to make community stakeholders aware of our intention to develop property in the area to build the school. In these difficult economic times, we are confident that our commitment to the economic development of the community will pave the way for positive relationships and generate positive buzz in the community announcing our presence.

James Madisons founders will also conduct outreach activities to engage local education, church and other youth social service leaders to inform them of our program and build relationships that create a pipeline to the youth that they serve. We will seek to present our schools mission and vision to their constituents and display informational materials for the school.

In addition to community partnerships, we will use the following strategies and tactics to recruit students and achieve enrollment goals:

Site Billboard and Onsite Staffed Admissions Trailer:

A billboard will be placed at the school construction site. We believe that this is a unique-to-North Carolina capacity for recruitment that James Madison will use to create awareness and interest in the community every day. The site billboard will include a school rendering, site plan, and the schools name, phone and website information needed for registration. The trailer on the building site will be staffed during normal business hours by a secretary and administrator who conduct outreach activities and will include informational packets and enrollment forms.

Direct Mailings:

James Madison will purchase appropriate mailing lists to send informational postcards and promotional materials for the school. There will be at least three such mailings during the development year. Mailings will particularly target low income and diverse communities within Wake County.

School Website:

Within 30 days of approval of this application, James Madison will launch a

school website that provides information about the schools mission and programs. It will also provide the option to complete an online enrollment application or print a hard copy, and it will give parents the opportunity to register for our mailing lists. The website will also track the progress of the building site and include pictures of the facility during its development.

Press Releases & Advertising:

On an ongoing basis, James Madison will release statements to the press notifying them of our progress and programs and purchase advertising space in local publications to help in its efforts to create awareness in the community. This will include periodic releases to local newspapers that highlight building progress and enrollment successes. Advertising will be used only if deemed necessary.

Facility Tours:

At least one month prior to school opening and subject to construction timelines, the facility will be open for tours for the general public. We believe that onsite tours will only increase enrollment numbers by providing families with the opportunity to see our innovative facility.

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.*

Public Parent Meetings:

The Founders and school leadership (upon hiring) will conduct multiple public parent meetings each month that will be communicated through community partnership platforms, press releases, on the school website and through its contact lists. These venues are effective platforms to build the enthusiasm for the school by describing the schools unique academic and fitness programming and opportunities for parental involvement, including participation on the Board.

Word of Mouth:

Word of mouth will be essential to our ability to achievement enrollment targets, therefore we will work diligently to engage the parents and community leaders who have expressed interest and give them the tools and materials necessary to encourage other families to consider James Madison as an alternative for their child as well. This will be accomplished through a database system that tracks all contact information for people that have expressed an interest and/or enrolled their child at the school. We will send out at least bi-weekly email updates, through an effective system like Constant Contact, of the schools progress and include information and enrollment materials that they can use to inform others. We will also quickly identify parents and community members who are very enthusiastic about the school, and we will engage them in outreach and enrollment activities, including taking part in the public parent meetings.

Parents are encouraged to take an active role in the education of their children. James Madison views its role as an education partner for parents. The school will have a parent volunteer organization called which will assist school administrators with some of the challenges they face in providing human or financial resources for school operations. Parents will be involved in fund raising for field trips, clubs, and other activities that enrich students educational experience.

Board meetings will be open to the public in accordance with NC charter school statute, and time will be reserved at these meetings for public comment from parents or other members of the community in order to allow direct communication with the Board.

James Madison will seek alliances with local businesses in the area in order to establish opportunities for internships or apprenticeship programs for our students.

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.*

During open enrollment, all applications get equal consideration regardless of date submitted. An application received at the end of open enrollment receives equal treatment to one received on the first day of open enrollment. Open enrollment for the next school year will end on the last business day in February.

Lotteries will be held for any grade in which the number of applications exceeds the number of openings. Names are randomly selected and applicants are accepted based on the order in which they are selected. The lottery continues until all names are drawn. Applicants who are not accepted will be placed on a waiting list in the order their names were selected.

In order to accommodate parents who have more than one child eligible for enrollment; siblings of currently enrolled students will be given preference over students who do not have accepted or enrolled siblings. Siblings will be offered the first available seat in their respective grade or placed on a waiting list with sibling preference. Sibling preference is defined as children who have at least one common parent/legal guardian AND are living in the same household at least 50% of the time.

The school will hold a public lottery during the second week in March, supervised by a neutral party, to select students for admission.

* The school will print out labels for all eligible students.

* A neutral party will pull labels in a public setting at a date, time and

location advertised publicly and provided to applicants. Lottery results in each applicant receiving a number beginning at 1, 2, 3 and continuing until all applicant labels have been pulled and read aloud. Once the number of applications selected in the lottery equals the number of available spaces for a grade, a waiting list will be generated by continuing to assign numbers to the remaining applicants.

* All applicants will receive a letter indicating whether they were selected or whether they are on the waiting list. Students selected will receive notification via certified letter. Waiting list students will receive notification via regular mail.

* The selected students have 30 days to submit a signed letter of intent. Signed letters of intent received after the 30 days will not be accepted for enrollment.

* If space becomes available, James Madison will attempt to contact waiting list students via phone, and if unable to do so, will mail certified letters offering the opportunity to enroll by a selected date. Waiting list students who fail to send a signed letter of intent by the selected date will not be accepted for enrollment.

A waiting list will be developed for applicants not admitted through the lottery. The lottery results in each applicant receiving a number beginning at 1, 2, 3 and continuing until all applicant labels have been pulled and read aloud. Once the number of applicants selected in the lottery equals the number of available spaces for a grade, a waiting list is generated by continuing to assign numbers to the remaining applicants. This waiting list will be the only official document identifying the names of eligible students who have applied to James Madison.

Parents will be notified by phone and given 24 hours to accept. This process will repeat until all slots have been filled. The waiting list will carry over through the entire school year. Failure to submit a signed letter of intent by that date results in forfeiture of opportunity to enroll. If seats become available, the school will attempt to contact waiting list students via phone, and if unable to do so, will mail certified letters offering the opportunity to enroll by a selected date. Those students on the waiting list who fail to submit a signed letter of intent by the selected date forfeit their opportunity to enroll. There will be no pre-admission activity for James Madison.

Once the school is operational, the office staff will define clear procedures for withdrawals and transfers.

PROJECTED ENROLLMENT 2014-15 through 2018-2019

IDENTIFY LEA FROM WHICH
STUDENTS WILL PROBABLY COME

LEA #1 Wake 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 920	LEA 000	LEA 000	LEA 920	LEA 000	LEA 000	LEA 920	LEA 000	LEA 000	LEA 920	LEA 000	LEA 000	LEA 920	LEA 000	LEA 000
Kindergarten	105	0		105	0		105	0		105	0		105	0	
Grade 01	104	0		100	0		100	0		100	0		100	0	
Grade 02	104	0		104	0		100	0		100	0		100	0	
Grade 03	104	0		104	0		104	0		104	0		104	0	
Grade 04	104	0		104	0		104	0		104	0		104	0	
Grade 05	104	0		104	0		104	0		104	0		104	0	
Grade 06	104	0		104	0		104	0		104	0		104	0	
Grade 07	0	0		104	0		104	0		104	0		104	0	
Grade 08	0	0		0	0		104	0		104	0		104	0	
	729			829			929			929			929		

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.

In accordance with state law, we do not allow transportation to be a barrier to any child attending the school. We expect that most parents will provide transportation for their children. However, we recognize this may not be a viable option for all parents. Therefore, the school will designate a Transportation Liaison to facilitate and coordinate transportation needs. Interested families may participate through sign-up forms that the dean coordinates by matching families with an appropriate carpool.

Additionally, the Board will work diligently so that the school is open and accessible to all students, including low-income students and students experiencing homelessness. The school will provide free transportation for students who are currently experiencing homelessness.

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.

Prior to school opening, the Board and leadership shall ensure that lunch is available to every student regardless of household income.

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		\$6,846.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$.00
Property Insurance	\$800,000		\$1,200.00
Motor Vehicle Liability	\$1,000,000		\$181.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other	\$1,000,000		\$25,543.00
Total Cost			\$34,102.00

*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.

jamesmcharter 02/28/2013

(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).

The Board intends to hire a developer specializing in charter school development to locate land, ensure proper zoning, obtain construction financing and leaseback the land to James Madison Academy. Upon charter acceptance, James Madison Academy will engage a developer to begin identifying sites.

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.*

N/A as a site has not yet been identified and cannot be placed under contract until charter approval.

V. FINANCIAL PLAN

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

Budget: Revenue Projections from each LEA 2014-15

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

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

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

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

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

LEA #1920 - Wake County Schools

Revenue	2012-2013 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2014-2015
State Funds	\$4,434.28	729	\$3,232,590.12
Local Funds	\$2,036.27	729	\$1,484,440.83
Federal EC Funds	\$3,743.48	73	\$273,274.04
Totals			\$4,990,304.99

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	\$273,274	\$310,334	\$347,769	\$347,769	\$347,769
-Local Per Pupil Funds	\$1,484,441	\$1,688,068	\$1,891,695	\$1,891,695	\$1,891,695
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-State ADM Funds	\$3,232,590	\$3,676,018	\$4,119,446	\$4,119,446	\$4,119,446
-Working Capital*	\$0	\$0	\$0	\$0	\$0
TOTAL INCOME	\$4,990,305	\$5,674,420	\$6,358,910	\$6,358,910	\$6,358,910

***If the applicant is depending on other funding sources or working capital to balance the operating budget, please provide documentation such as signed statements from donors, foundations, bank statements, etc., on the availability of these funds.**

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

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

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

BUDGET EXPENDITURE PROJECTIONS Personnel	2014-2015			2015-2016			2016-2017			2017-2018			2018-2019		
	<i># Staff</i>	<i>Salary per</i>	<i>Total salary</i>	<i># Staff</i>	<i>Salary per</i>	<i>Total salary</i>	<i># Staff</i>	<i>Salary per</i>	<i>Total salary</i>	<i># Staff</i>	<i>Salary per</i>	<i>Total salary</i>	<i># Staff</i>	<i>Salary per</i>	<i>Total salary</i>
Personnel:															
Principal	1	\$75,000	\$75,000	1	\$75,000	\$75,000	1	\$75,000	\$75,000	1	\$75,000	\$75,000	1	\$75,000	\$75,000
Assistant Principal	1	\$55,000	\$55,000	1	\$55,000	\$55,000	2	\$55,000	\$110,000	2	\$55,000	\$110,000	2	\$55,000	\$110,000
Business Manager	1	\$40,000	\$40,000	1	\$40,000	\$40,000	1	\$40,000	\$40,000	1	\$40,000	\$40,000	1	\$40,000	\$40,000
Admin. Assistant	2	\$33,000	\$66,000	2	\$33,000	\$66,000	2	\$33,000	\$66,000	2	\$33,000	\$66,000	2	\$33,000	\$66,000
Building Manager	.5	\$40,000	\$20,000	.5	\$40,000	\$20,000	.5	\$40,000	\$20,000	.5	\$40,000	\$20,000	.5	\$40,000	\$20,000
Information Technologist	.5	\$55,000	\$27,500	.5	\$55,000	\$27,500	.5	\$55,000	\$27,500	.5	\$55,000	\$27,500	.5	\$55,000	\$27,500
Registrar	1	\$42,000	\$42,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000
Exceptional Children Coordinator	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$50,000	\$50,000
Core Content Teacher(s)	32	\$44,000	\$1,408,000	37	\$44,000	\$1,628,000	42	\$45,000	\$1,890,000	42	\$45,000	\$1,890,000	42	\$45,000	\$1,890,000
Para Educator(s)	17	\$25,000	\$425,000	17	\$25,000	\$425,000	17	\$25,000	\$425,000	17	\$25,000	\$425,000	17	\$25,000	\$425,000
Electives/Specialty Teacher(s)	4	\$44,000	\$176,000	5	\$44,000	\$220,000	6	\$45,000	\$270,000	6	\$45,000	\$270,000	6	\$45,000	\$270,000
Exceptional Children Teacher(s)	2	\$44,000	\$88,000	3	\$44,000	\$132,000	3	\$45,000	\$135,000	3	\$45,000	\$135,000	3	\$45,000	\$135,000
Total Personnel	63	\$547,000	\$2,472,500	70	\$547,000	\$2,780,500	77	\$550,000	\$3,150,500	77	\$550,000	\$3,150,500	77	\$550,000	\$3,150,500
Benefits:	<i># Staff</i>	<i>Cost Per</i>	<i>Total</i>												
Health Insurance	63	\$1,000	\$63,000	70	\$1,000	\$70,000	77	\$1,000	\$77,000	77	\$1,000	\$77,000	77	\$1,000	\$77,000
Medicare	63	\$569	\$35,847	70	\$576	\$40,320	77	\$593	\$45,661	77	\$593	\$45,661	77	\$593	\$45,661
Retirement Plan	63	\$294	\$18,522	70	\$298	\$20,860	77	\$307	\$23,639	77	\$307	\$23,639	77	\$307	\$23,639
Social Security	63	\$2,433	\$153,279	70	\$2,463	\$172,410	77	\$2,537	\$195,349	77	\$2,537	\$195,349	77	\$2,537	\$195,349

Total Benefits	252	\$4,296	\$270,648	280	\$4,337	\$303,590	308	\$4,437	\$341,649	308	\$4,437	\$341,649	308	\$4,437	\$341,649
Total Personnel Budget	315	\$551,296	\$2,743,148	350	\$551,337	\$3,084,090	385	\$554,437	\$3,492,149	385	\$554,437	\$3,492,149	385	\$554,437	\$3,492,149

***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	Admin. Supplies	\$3,780	\$3,780	\$3,780	\$3,780	\$3,780
Books and Supplies	Instructional Materials	\$109,511	\$113,391	\$113,391	\$113,391	\$113,391
Human Resources Costs	Contracted Services	\$320,396	\$358,465	\$431,329	\$431,329	\$431,329
	Professional Development & Stipends	\$45,300	\$50,300	\$55,300	\$55,300	\$55,300
	Special Education	\$17,517	\$17,517	\$17,517	\$17,517	\$17,517
Other	Enrollment Contingency	\$399,194	\$453,954	\$508,713	\$508,713	\$508,713
	Expense Contingency	\$49,899	\$113,488	\$127,178	\$127,178	\$127,178
	Extra-Curricular Athletics	\$26,700	\$26,700	\$26,700	\$26,700	\$26,700
	Facility Repairs & Maintenance	\$44,074	\$54,074	\$54,074	\$54,074	\$54,074
	Insurances	\$25,543	\$25,543	\$25,543	\$25,543	\$25,543
	Misc.	\$15,104	\$15,104	\$15,104	\$15,104	\$15,104
Rents and Debt Services	Facility Lease/Mortgage	\$1,050,000	\$1,200,000	\$1,200,000	\$1,200,000	\$1,200,000
Technology Technology Hardware	Purchase-Rent-Repair	\$55,000	\$55,000	\$55,000	\$55,000	\$55,000
Utilities	Utilities	\$67,660	\$67,660	\$67,660	\$67,660	\$67,660
	Total Operations	\$2,229,678	\$2,554,976	\$2,701,289	\$2,701,289	\$2,701,289

***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)	\$2,743,148	\$3,084,090	\$3,492,149	\$3,492,149	\$3,492,149
TOTAL EXPENDITURE (OPERATIONS)	\$2,229,678	\$2,554,976	\$2,701,289	\$2,701,289	\$2,701,289
TOTAL EXPENDITURES	\$4,972,826	\$5,639,066	\$6,193,438	\$6,193,438	\$6,193,438
TOTAL REVENUE	\$4,990,305	\$5,674,420	\$6,358,910	\$6,358,910	\$6,358,910
ANNUAL NET PROJECTIONS	\$17,479	\$35,354	\$165,472	\$165,472	\$165,472

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 are based upon the experience of board members in overseeing the financial operation of other charter schools in NC. The enrollment targets are determined by seeking economies of scale, particularly as it pertains to affording the school facility the board anticipates occupying. This facility is designed to accommodate the curriculum and character development program of the proposed school and the rent is anticipated to be about 20% of revenues, or less. The board believes there exists sufficient demand in the targeted market to achieve the enrollment assumed in the operating budget. However, if such demand should not materialize, the board is prepared to implement cost cutting measures necessary to avoid deficit spending. The break-even point for student enrollment is approximately 600 students. Although the budget reflects the same education program being adopted by other charter applicants in different locations within NC, care is being taken by this board to ensure the implementation of the program and the corresponding budget is adjusted in order to fit the specific funding levels of the particular location of this proposed school.

- 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*

The board intends to engage service providers for accounting, payroll and annual audits. The schools principal and business manager will work closely with these providers for effective financial management on a day to day basis. Criteria for selection of contractors will include relevant experience with charter school finance and reporting, cooperative "team oriented" working style, and expertise to advise the board in how best to adjust to financial opportunities and threats that may arise from time to time. The board will approve by vote any contracts entered into, taking care to see that the state of NC is explicitly exculpated from any obligations the board may undertake.

- 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.*

The budget has two primary spending priorities that are critical to meeting

the schools mission: personnel and facilities. The schools mission cannot be met without both of these components available in a level of sufficient quality. The school has contingency planning in the budget for both expense overruns and enrollment (revenue) shortfalls. Unused contingency funds and operating surpluses will be kept in a reserve to be built up year by year. The following table illustrates the annual contingency funding and consequential reserve build up over time assuming the contingencies are not realized:

Year:	2014-15	2015-16	2016-17	2017-18	2018-19
Enrollment Contingency	\$399,194			\$453,954	\$508,713
Expense Contingency		\$ 49,899		\$113,488	\$127,178
Planned Surplus		\$ 17,479		\$ 35,354	\$165,472
Max Reserve Deposit		\$466,572		\$602,796	\$801,363
Cumulative Reserves		\$466,572		\$1,069,368	\$1,870,731
					\$2,672,094
					\$3,473,457

At the time of application, the board does not have cash on hand, bonds, real estate or grants.

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.*

The board has received an initial commitment for provision of a facility before the school opens by leaders at the Charter School Fund contingent upon the proposed charter being approved. The board has received no commitment of other funds through grants or loans from other corporations or foundations, and the operating budget and plans for school opening are not dependent on such grants or loans.

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?*

Plans for dealing with revenue shortfall are to cut costs to avoid an operating deficit. Cost cutting measures may be the delay or reduction in acquisition of equipment, furnishings, and hiring of faculty and staff. It is possible that layoffs or salary reduction steps would be taken to preserve the financial integrity of the school. Considering some of the foregoing steps are taken, the approximate break-even enrollment figure is shown as follows:

Year:	2014-15	2015-16	2016-17	2017-18	2018-19
Break-even Enrolment:	600	625	625	625	625

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

Year one cash flow contingency (Enrollment Contingency) is \$399,194. See table shown three questions above for listing of all contingency budget items.

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.

The board will contract with the LGC-approved auditor in the spring of 2015. Once the financial books have been closed for the 2014-15 initial operating year (expected by mid- to late-July, 2015), the auditor will be given the necessary information to conduct the audit, and if necessary, a site visit can be arranged. The audit will be turned in to the LGC by October, 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 board intends to contract with Thomas, Judy and Tucker, P.A., Certified Public Accountants to conduct the financial audit of the school. TJT has conducted numerous annual audits of NC charter schools.

Thomas, Judy and Tucker, P.A.
4700 Falls of Neuse Road
Suite 400
Raleigh, NC 27609

Telephone: 919-571-7055
Fax: 919-516-0277

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 James Madison 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: jamesmcharter

Board Position: Norman L. George III, Lead Applicant

Signature: _____

Date: 03/01/2013

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

Notary Public

Official Seal

My commission expires: _____, 20____.