



## **NORTH CAROLINA CHARTER SCHOOL APPLICATION**

# **The Expedition School**

**Public charter schools opening the fall of 2014**

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

**Due by 12:00 noon, March 1, 2013**

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

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

## CHARTER SCHOOL

### 2013 Application Process

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

#### APPLICATION DUE DATE/TIME

**January 4, 2013**

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

**March 1, 2013**

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

**March 8, 2013**

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

#### APPLICATION SPECIFICATIONS

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

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

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**I. APPLICATION CONTACT INFORMATION**

Name of proposed charter school: The Expedition School

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

Name of non-profit organization under which charter will be organized or operated: *The Expedition School, Ltd.*

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: *Tammy Finch*

Title/Relationship to nonprofit: *Board President*

Mailing address: 208 Goldfinch Ct.  
Mebane NC 27302

Primary telephone: 919-609-4026 Alternative telephone: 919-609-4477

E-Mail address: *tfinchteacher@yahoo.com*

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

County: ORANGE

LEA: 680-Orange County Schools

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

No:

Yes:

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

No:

Yes:

What is the name of the nonprofit organization that governs this charter school? The Expedition School, Ltd.

**Grade Levels Served and Total Student Enrollment:**

Projected School Opening: Year 2014 Month July

Will this school operate on a year round schedule?

No:

Yes:

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

<b>Academic School Year</b>	<b>Grade Levels</b>	<b>Total Projected Student Enrollment</b>
First Year	K,01,02,03,04,05,06	300
Second Year	K,01,02,03,04,05,06,07	343
Third Year	K,01,02,03,04,05,06,07,08	387

Fourth Year	K,01,02,03,04,05,06,07,08	364
Fifth Year	K,01,02,03,04,05,06,07,08	364
Sixth Year	K,01,02,03,04,05,06,07,08	364
Seventh Year	K,01,02,03,04,05,06,07,08	364
Eight Year	K,01,02,03,04,05,06,07,08	364
Ninth Year	K,01,02,03,04,05,06,07,08	364
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*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.*

explorer  
Signature

Tammy Finch Board Member  
Title

explorer  
Printed Name

02/27/2013  
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:*

The Expedition School develops the curiosity of children and empowers them to become innovators, problem solvers and community builders. We provide a strong academic foundation through STEM focused, experiential and project based learning.

### **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.*

The targeted population of The Expedition School is students who reside in or around Orange County NC. The census bureau indicates that Orange County, NC is comprised of 70% white, 12% black, 7% asian, 8% Latino, and 3% multiracial and other races. We intend to have our school reflect the community's ethnic population. The Expedition School will be an asset to Orange County, NC, providing the only project-based, STEM focused K-8, year round school in the county. Nearby charter schools with a similar project-based focus (Voyager and Central Park, both in Durham) maintain long waiting lists. The Expedition School's location in Orange County will not only serve Orange county students, but is very close to Durham County. Durham families desiring this type of education will have the opportunity to attend TES, reducing their chances of being wait listed at the similar school nearby. Families desire choice in the type of education their children receive. There are not many charter schools in Orange county, and we will help bring another choice in education to this area.

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

The projected enrollment for year 1 is 299, and this grows to 387 by year 3. At this time we plan to drop one class after the third year, and maintain a consistent population of 364. This school will have a positive impact on the surrounding districts and region. There are approximately 19,469 students are enrolled in Orange County Schools and Chapel Hill-Carrboro City schools. Students may enroll in The Expedition School from Orange County, and from surrounding counties, which enlarges the number of students enrolled in schools. The Expedition School will enroll 299-387 of these students. We do not foresee enrolling 2% of the county's student population as being of significant financial impact, but do see the social and educational impact of a model and scalable school as important.

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

Our model is very different from the local area schools in curricular approach and classroom design. The Expedition school will provide a K-8 experiential, project-based, educational plan with a STEM focus on a year-round calendar. While some of the Orange County Schools provide some experiential and STEM focused learning, none, that we are aware of, provide this within a project-based learning model in a K-8 setting. There are also no year-round middle schools in Orange county, therefore, we feel our middle school option will fill a niche in this community due to our year-round calendar. Students exiting Orange county's year-round elementary school will have a year-round option to consider for their middle school years.

Our educational plan focuses on the strengths of each student in a multi-age classroom environment where students loop with the same teacher for at least two years. Differentiation within this environment will provide opportunities for each student to succeed at his or her own learning level. Remaining with the same teacher for multiple years will allow for the teacher-student relationship to become very strong and will maximize learning as year to year transitions are minimized.

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.*

Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site: The organizational structure, will allow for management and instructional decisions to be made by the people most affected by those decisions in consultation with each other. Also, the school plans to have a Director of

Curriculum and professional development who will conduct regular professional development sessions with the teachers on the school site and make the mission and vision of the school become a reality. Also, additional funds have been budgeted to provide professional development in addition to the development provided by the Director of Curriculum. The School Director and the Director of Curriculum and Professional Development will share administrative duties and regularly collaborate with teachers. This shift not only allows the Director and Curriculum Director to spend part of every day in the classrooms, but also prevents the isolation of teachers and principals that often occurs in school settings.

Hold schools accountable for meeting measurable student achievement results:  
The evaluation tools at The Expedition School will include the following:

Participation in the state's accountability Model

NC required End of Grade/End of Course tests

MAP test or other nationally normed test

Comprehensive, authentic assessment

Portfolio review

Use of the North Carolina Department of Public Instruction STEM Education Schools and Programs STEM attribute implementation rubric

The Expedition School will use Comprehensive Assessment to promote student accountability for learning. The Expedition School will focus on child-centered, learning-focused assessments. These include but are not limited to essays and written work, role plays that mirror real life tasks, teacher observations, checklists, real-life project applications of knowledge graded using rubrics, experiments, projects, performances, multiple choice tests, and portfolios, as primary evaluation tools. These tools and other assessment choices designed by the teacher team will constitute The Expedition Schools Comprehensive Assessment.

Comprehensive Assessment drives instruction because, "Time is not lost for teaching and learning. The time spent IS teaching and learning. Actual conduct of the assessment is a learning experience for students. It informs teaching, [and] gives feedback to teachers immediately about how to meet students needs, so it is actually productive time." Linda Darling-Hammond, Professor, Stanford University School of Education (<http://www.edutopia.org/comprehensive-assessment-overview-video>)

Use of the North Carolina Department of Education STEM implementation rubric (see appendix R) will help our school learn and measure the steps needed to become a "prepared" or "targeted" quality program. The STEM Attributes describe a quality STEM education school or program. While some of the attributes specifically target high school populations, we feel the majority of this rubric holds relevance to our schools goals. Our goal is have at least 50% of the STEM attributes at the "Prepared" level within the first 3 years and move towards 80% of the K-8 appropriate attributes at the "Prepared" level by year 5. By year 8, the school should have 90% of the K-8 appropriate attributes at or beyond the "Prepared" level.

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

Based on feedback from local parents and community members on our website, there is a desire for a school like ours in Orange Co. Our school offers small class sizes, a project-based approach, a STEM focus, and a strong

commitment to community. This type of school is currently not available in the Orange County public school system. Over 250 students have indicated interest in enrolling already.

The Expedition School will improve student learning by:

Hiring highly qualified staff that support the schools mission and philosophy.

Providing students with a STEM focus in order to build a strong base in these subjects.

Differentiating instruction to meet the learning needs of all students at developmentally appropriate levels.

Integrating curriculum through project-based learning to allow for a deeper level of learning.

Using comprehensive assessment (portfolios, formative assessments, authentic methods)

Being child-centered

Creating a community where all parties are respected.

Increasing learning opportunities for all students, with a special emphasis on at-risk or gifted students:

Our strength-focused multi-age classrooms will celebrate what each individual is doing well and foster an atmosphere of success in order to keep a spirit for learning high. We believe this type of atmosphere benefits all students, especially students who struggle and those who are academically gifted. In a multi-age classroom, it is more "natural" for students to be doing different things based on strengths. Struggling and high achieving students can be equally challenged.

A critical feature of our classrooms will be differentiated instruction. Students will move through the curriculum at a pace appropriate for him or her at that particular time. Our small class size and highly qualified staff will allow for structured lessons and projects that maximize student learning at an appropriate level, not an arbitrary level that may be inappropriate.

Encourage the use of different and innovative teaching methods:

Innovative teaching methods are at the core of The Expedition School. The Expedition School will concentrate on the implementation of these principles: Differentiated and developmentally appropriate, integrated, project based and child-centered with a STEM focus.

Differentiated and Developmentally Appropriate

Development proceeds at varying rates from child to child. Teachers plan for this in lessons and activities by preparing opportunities for students to practice newly acquired skills at the right level, and experience challenge just beyond the level of their present mastery and also by allowing children to demonstrate their knowledge by using different ways of representing what they know.

An integrated curriculum provides an organizing topic or concept within the children's range of experience, children can explore, interpret, and engage in learning activities that draw on goals from one or more subject-matter disciplines. Integrated curriculum activities allow for individual learning styles and multiple intelligences within the context of authentic work.

Project Based Learning with a STEM focus

"Research has shown that students learn content as well or better using Project Based Learning (PBL) than with traditional instruction. It also shows that students remember what they have learned longer and are better able to use what they have learned. PBL provides the opportunity to learn and practice skills that traditional instruction often ignores -- working in groups, making choices, monitoring progress, thinking deeply about a problem or challenge, and communicating what has been learned. In short, PBL helps students not only learn content but also the 21st-century skills they will need to thrive in a quickly changing, globally connected world." John Mergendoller, executive director of the Buck Institute for Education (BIE). The STEM focus will help expose children to STEM thinking and processes and job fields, preparing them for their future.

A child-centered or emergent learning environment is structured with a commitment to understanding how children learn and develop and in capitalizing on their areas of interest. Teachers work to create a concept rich classroom providing materials, tools, opportunities and guidance while encouraging children to make choices, to interact with the environment and other children.

### **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?*

To measure the excellent education, The Expedition School will use the following gauges of success:

Participation in the state's accountability Model  
NC required End of Grade/End of Course tests  
MAP testing or other nationally normed test  
Reviewed annually, using the target goals set below.

To measure the experiential project based learning, The Expedition School educators will implement a minimum of two project-based learning experiences per year. The curriculum director will provide a summary report about the projects bi-annually, and the board will be invited to project showcases, as appropriate throughout the year.

To show how students are innovators, problem solvers and community builders, The Expedition School will use comprehensive, authentic assessment and portfolio review. The school director will brief the board on the school's portfolio use and samples of portfolios may be presented to the board annually. The board will be invited to end-of-project showcases periodically throughout the year.

To analyze the school's STEM focus, the board will use of the North Carolina Department of Public Instruction STEM Education Schools and Programs STEM attribute implementation rubric annually. While some of the attributes specifically target high school populations, we feel the majority of this rubric holds relevance to our school's goals. Our goal is to have at least 50% of the STEM attributes at the "Prepared" level within the first 3 years and move towards 80% of the K-8 appropriate attributes at the "Prepared" level by year 5. By year 8, the school should have 90% of the K-8

appropriate attributes at or beyond the "Prepared" level.

- 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.*

The Expedition School will guide students towards personal growth in innovation, problem-solving, character development, and community building, and expect academic excellence. The Expedition School believes that the schools teaching methods, and results of Comprehensive Assessment will translate to exceptional EOG scores and MAP growth scores, as well as build the skills mentioned above, necessary for work and life. The students performance levels will be targeted to meet or exceed the standards defined by NC Essential Standards and Common Core Standards. The overall goal is that all students regardless of race, poverty, language or disability will be equipped with the knowledge and skills needed to be successful in school, college and life.

Timeline:

2014-15

Teachers design student centered assessments with at least two major performance assessments to include in a portfolio. Teachers analyze and students self-analyze portfolio and share with parents.

Pending funding: nationally normed (or MAP) testing begins Fall and Spring

At least 75% of students show expected growth on their nationally normed tests scores (pending funding)

At least 75% of students meet level III on the EOG test.

At least 75% of students show expected growth in their portfolio work.

2015-16

Teachers add to and refine student centered assessments and portfolio components. Students self-analyze portfolio (with the ability to look back to last years work too) and share with parents.

Middle school portfolio critique circles begin

MAP/nationally normed testing

At least 78% of students show expected growth on their MAP/normed scores

At least 78% of students meet level III on the EOG

At least 78% of students show expected growth in their portfolio work.

2016-2019 The assessments will remain the same pattern as above. Testing targets will increase 2% each year.

Portfolio Assessment: In doing project based learning, students will: obtain, comprehend, analyze, communicate, apply, synthesize, and evaluate information across core disciplines. In addition, students will demonstrate 21st century skills such as: collaborating with others, leadership, determination, presentation skills, resiliency, self-reflection, and ability to problem solve.

The skills above and other qualitative elements such as motivation and work habits are not normally tested on standardized tests. Therefore, they will be demonstrated through projects collected in a portfolio. Project rubrics will include ratings of academic growth as well as additional skills mentioned above to help students develop a comprehensive picture of their

own progress.

To promote self-reflection and goal setting, students will be instrumental in selecting and analyzing pieces to keep in their portfolio. Self-evaluation is an integral part of portfolio assessment, thus students will be taught to set goals based upon portfolio selections.

At a minimum, two comprehensive assessment or project outcomes that integrate curricular areas (from Fall/Spring) will be saved in a students portfolio. Students and teachers will analyze the students growth over time by reviewing the portfolio pieces.

This portfolio review will be presented to parents by each student and teacher as an accountability measure during bi-annual parent conferences.

Middle School portfolios:

Middle school students (grade 5-8) will be taught how to participate in critique circles: a group of 5 to 6 students who provide feedback on each others work. After a critique circle, students can elect to further edit their work prior to filing it in their portfolios, or decide to enter the work into their portfolio "as-is."

Eighth graders will participate in the "Eighth Grade Review" during which the they showcase their culminating portfolios to teachers, community business members and parents. Eighth grade portfolios require proof of learning in the 4 core subject areas, plus a successful cross-disciplinary research project.

### III. EDUCATION PLAN

(No more than ten total pages in this section)

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

#### **Instructional Program:**

Provide a detailed description of the overall instructional program of the proposed charter school, including major instructional methods, assessment strategies, and explain how this instructional program and model meet the needs of the targeted student population.

The Expedition School has modeled its instructional program after Central Park School for Children and Voyager Academy, both "NC schools of distinction" and project based charter schools in Durham NC. The school will follow the Common Core Standards and NC Essential Standards.

1. Experiential instructional strategies at The Expedition School will include the following:

The regular integration of STEM disciplines with other subject matters through project-based and integrated units

Open-ended and "real-world" authentic problems that integrate content and hands-on learning

Reflection about work with goal setting

Small group activities and Classroom workshop

Differentiated and developmentally appropriate learning

Reflective and formative comprehensive assessments

Public speaking and presentations

"Through an integrated approach to STEM education focused on real-world, authentic problems, students learn to reflect on the problem-solving process. Research tells us that students learn best when encouraged to construct their own knowledge of the world around them (Satchwell & Loepp, 2002). It is through integrated STEM projects that this type of learning can occur."

2. Responsive Classrooms

The Expedition School believes that discipline, character development, and learning how to become self-regulated and independent are subjects worthy of classroom instruction. To build community, teach and model positive social behavior, and set a positive tone for the day, each class will begin with a morning meeting. In this meeting, students learn to greet and speak to each other and to adults, learn about one another, learn about and discuss positive character traits, and set goals for themselves and the day. The set of social skills that children will learn and practice in order to be successful form the acronym CARES - Cooperation, Assertion, Responsibility, Empathy and Self-control. Social and behavioral learning and character development will not be isolated to the morning meeting, but will continue throughout the day, integrated into the daily flow. Teachers are keen observers of students and will provide positive feedback, guidance and re-direction as needed. Student growth in discipline, character development, responsibility and independence will be communicated to families at least twice per year during parent teacher conferences. As a part of our

responsive classrooms, some students will be selected to be trained in peer mediation. Training students as model leaders of positive behavior who are able to help others is empowering to both the peer mediator and the students receiving the help.

3. Small, Familial, Multi-age Environment (See next box)

4. Assessment

The Expedition School will use Comprehensive Assessment to promote student accountability for learning. The Expedition School will focus on developmentally appropriate, learning-focused assessments. These include but are not limited to essays and written work, role plays that mirror real life tasks, teacher observations, checklists, real-life project applications of knowledge graded using rubrics, experiments, projects, performances, multiple choice tests, and portfolios, as primary evaluation tools. These tools and other assessment choices designed by the teacher team, collected in a portfolio, and paired with standardized assessments such as the EOG and MAP testing constitute The Expedition Schools Comprehensive Assessment. Comprehensive Assessment allows students to practice and model not only content standards, but also skills needed in the work world that are not commonly tested; skills such as determination, ability to problem-solve, collaboration and leadership skills. Since comprehensive assessment provides immediate feedback to teachers, curriculum can be adjusted to meet students needs on an ongoing basis.

Comprehensive Assessment drives instruction because, "Time is not lost for teaching and learning. The time spent IS teaching and learning

### **K-8 Curriculum and Instructional Design:**

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

The school will have a small, familial, multi-age classroom environment with classes averaging 17-23 students. As best as possible, the class will be enrolled "half-and-half" of each grade. (Example, half first and half second graders.) Kindergarden will not be multi-age. Multi-age classes will begin at first grade, with 1st+2nd grade classes, 3rd+4th grade classes, 5th+6th grade classes and 7th+8th grade classes.

In a multiage classroom, all students remain ("loop") with the teacher for two or more years. Therefore, approximately half the class moves on to a new teacher each year. This provides student leaders in the classroom each year and provides the teacher double the time to get to know each student. The teachers will be able to develop a deep relationship and knowledge of the students skills over time, decreasing the need for breaks in the learning process for assessments and "get to know you" activities, or for covering classroom expectations.

Multiage classrooms provide the setting for students to progress through curricular objectives at their own developmental pace with the use of differentiated instruction. Traditional "graded" classroom place normative pressure on children due to consistent comparison to age-mates. Multiage classrooms are intentionally blended in order to take advantage of the different skills and talents students at various ages can offer (Miller, 1996). Katz, Evangelou, and Hartman (1990) claim that children spontaneously

create mixed-age peer groups in a natural environment because children of different ages supplement each other's needs and abilities. Many educators (Pavan, 1992; Katz, 1995; Guastad, 1995; Ishler and Vogel 1996) believe that multiage classrooms make learning more developmentally appropriate. (Heins, Ichenor, Coggins, Hutchinson 2000).

Multiage classrooms will allow for continuous progress, student collaboration and allow students and teachers to learn to value each others strengths as they work together on integrated projects. Multiage classrooms will help us to instill the positive values of community and teamwork. Multi-age team building within the classroom and school is an important element of our program. To this end, as much as possible, pull-out will be a limited part of the standard school day.

Because it is also important to document how students are progressing in the multi-age environment, and to provide teachers with further instructional information, and to provide parents with Nationally Normed concrete data of their students growth, The Expedition school will also use MAP (Measure of Academic Progress) testing from the Northwest Evaluation Association (NWEA) or another nationally normed test. MAP testing will be administered at least two times per year in fall and spring for all grades K-8 in reading, and math. Science testing will be administered in grades 5-8. These tests help teachers identify students instructional needs, and the Descartes continuum of learning that is an outcome of MAP testing, (or use of data from another nationally normed test) helps teachers pinpoint where students are ready to learn. It is aligned to state standards and helps translate the raw data from the assessment into actionable plans for instruction, grouping and more. MAP testing provides student growth scores. Therefore student growth can be measured, used for instruction, and reported to parents and other constituents. If MAP "brand" testing is not used, another nationally normed test that can show growth will be used.

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 School's Mission is:

The Expedition School develops the curiosity of children and empowers them to become innovators, problem solvers and community builders. We provide a strong academic foundation through STEM focused, experiential and project based learning.

We embrace children as naturally full of energy and curiosity, believing that all children can learn regardless of background. The schools belief is that students, working with dedicated faculty and families, will excel in their academic goals and life pursuits.

In order to prepare our children for a future in our global society, and to prepare students to be creative, innovators and problem solvers, The Expedition School places a strong emphasis on experiential learning in science, technology, engineering and math, integrated with literacy, social

studies and the arts.

The Expedition Schools developmentally appropriate environment deepens learning by connecting it to real-world themes and ideas and providing experiential, hands-on experiences, including project-based learning. Learning at The Expedition School is collaborative, reflective, and challenging and provides opportunities for student choice.

We believe that strong communities aid student success. At The Expedition School, students are grouped in multi-age classrooms in which students remain for a 2-year span. This allows the student/teacher/family and peer relationships to grow stronger, and allows for students to learn at a pace that is appropriate for them.

Our educational theory begins with the realization that all children, regardless of background, can learn, and more students will learn if material is presented in a variety of engrossing ways. One method does not work for all students all of the time. A variety of learning styles needs to be addressed; all students need to be captivated; and all teachers need to be invested in the curriculum. Much of the foundation for this school comes from the book, *Methods That Matter* by Harvey Daniels and Marilyn Bizar. These authors have integrated "best practice" ideas taken from multiple studies by groups such as the National Council of Teachers of Mathematics, the National Science Teachers Association, and the Center for the Study of Reading. Despite the differing subject matters, the studies show the same truths about successful classrooms across all subjects and in all grade levels. The studies acknowledge success in classes that are student-oriented, experiential, reflective, collaborative, developmental, and challenging. The studies support what many teachers have always known: children learn by doing, in context, and from meaningful reflection. They produce more when they have choice, opportunities for collaboration, and ownership of their work. We seek to provide such an environment at The Expedition School.

Our educational methods also come from current research being published on Edutopia.org's series "Strategies for Learning" and the Buck Institute for Education Project Based Learning research. Project-based learning incorporates all the effective strategies mentioned above into an authentic and cohesive learning experience.

The school's curriculum aligns with the NC accountability model as it provides a method for all children to succeed at their highest potential. Comprehensive assessment, which include standardized assessments, help track student progress and growth in academic disciplines, and well as go beyond the NC accountability model by tracking student growth in innovation, problem solving and community building in student portfolios.

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.

Teachers at The Expedition School will be expected to master the Common Core and NC Essential Standards curriculum for their teaching area. Teachers will also be asked to master the following instructional strategies and will be supported in doing so by the Curriculum Director whose primary duty is staff development. The school has a strategic staff development plan to roll out training over the course of several years allowing staff to fully

integrate learning into daily practice.

1. Differentiated, developmentally appropriate Instruction in a multi-age setting

Each student comes to school full of strengths, energy, and curiosity that can exponentially grow. Each child has something meaningful to offer to the world. It is important to find and build upon children's individual strengths, energy, and curiosity while challenging them to reach for new goals. Differentiating instruction will result in increased achievement because each student will be challenged to grow and learn at a level, rate, or in a style appropriate to him or her. We do not aim to fit "square pegs into round holes" at our school, but rather to create challenging, appropriate education for any child who comes to our school.

2. "Responsive Classroom" strategies

The Expedition School believes that discipline, character development, and learning how to become self-regulated and independent are subjects worthy of classroom instruction. "Responsive Classroom" strategies create a positive learning environment, allowing for students to feel safe to learn and grow. These strategies also help students to learn positive character traits that can build a positive learning community.

3. Project-Based, integrated Learning with a STEM focus

"Research has shown that students learn content as well or better using Project Based Learning (PBL) than with traditional instruction. It also shows that students remember what they have learned longer and are better able to use what they have learned. PBL provides the opportunity to learn and practice skills that traditional instruction often ignores -- working in groups, making choices, monitoring progress, thinking deeply about a problem or challenge, and communicating what has been learned. In short, PBL helps students not only learn content but also the 21st-century skills they will need to thrive in a quickly changing, globally connected world." John Mergendoller, executive director of the Buck Institute for Education (BIE). The STEM focus will help expose children to STEM thinking and processes, and STEM job fields, preparing them for their future.

4. Comprehensive assessment methods

Comprehensive Assessment drives instruction because, "Time is not lost for teaching and learning. The time spent IS teaching and learning. Actual conduct of the assessment is a learning experience for students. It informs teaching, [and] gives feedback to teachers immediately about how to meet students needs, so it is actually productivetime." Linda Darling-Hammond, Professor, Stanford University School of Education.

Comprehensive Assessment allows students to practice and model not only content standards, but also skills needed in the work world that are not commonly tested; skills such as determination, ability to problem-solve, collaboration and leadership skills. Since comprehensive assessment provides immediate feedback to teachers, curriculum can be adjusted to meet students needs on an ongoing basis. Assessments such as projects, performances, portfolios, and real-life applications take time. As teachers observe and work with students who are completing tasks, teachers can intervene, adjust curriculum and instruct even during the assessment period, making the assessment an integral part of the learning experience.

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.

#### Year Round Schedule

The Expedition School will provide educational programming for 185 school days, or 1025 hours and operate on a year round schedule. We believe a year-round schedule provides the consistency children need to maintain their learning growth. It creates a more fluid year for teaching and learning, eliminating the need to "start over" after a summer break. This, in turn, reduces the amount of assessment and review time needed each year as teachers will have a continuous "eye" on each student. This model also fits well with our multi-age classrooms in that teachers will have the opportunity to continue with each students growth for more than one year with shorter break periods.

Quarterly intersessions provide time to schedule enrichment camps that students can attend. Over time, the Expedition School will provide age appropriate intersession enrichment opportunities for students to remain in an engaging, child-centered environment throughout the year. Our year round schedule will closely coincide with Orange County School's year round calendar so that students can take advantage of intersession enrichment opportunities available in the community as well. This calendar is not yet published for the 2014-15 school year, so the 2013-14 year round calendar is included in the appendix as a sample.

The Expedition School reserves the right to alter Orange County's year round calendar for it's own use, since not all Orange County events and dates align with The Expedition School's mission and vision.

#### **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.

The school will provide assistance to those not performing at expected levels through the use of small class size, differentiated instruction, extra time, and collaboration between special education, ESL and general education teachers and the curriculum director.

At our school, students work at a pace appropriate for their learning needs. Student progress is marked on a continuum of learning. MAP testing (or other nationally normed testing) assists in pinpointing starting points on this continuum. The continuum includes student objectives for a several year span and will show whether a student is progressing towards, or has mastered, particular objectives. Student achievement goals are set by the teacher, the teaching team, which may include the ESL or EC teacher, and as appropriate, with student and parent input.

Expected levels are indicated by the students achievement goals as described above. Students will be working toward their objectives at their own pace as well as participating in group objectives. Teachers work with students at the students own level. In the multi-age classroom, and with integrated curriculum, there is less pressure to move on in curriculum at a lock-step pace, and more incentive to provide what each child needs when they need it, at the appropriate pace for the child, with the ongoing goal to build student strengths and to move the child onward on a journey of excellence.

Differentiated instruction:

TES believes in focusing on students strengths and building a community where all learners can thrive and play their part at a pace that makes sense for them. Differentiated instruction allows each learner to access the learning at their own starting point. Teachers push students from where they are to the next level. This model will serve learners on any level, from gifted students to at risk students. This model is the primary means for serving AIG (gifted) students and struggling students. Since instruction can be tailored to meet differing needs, levels and strengths, differentiation allows AIG students, struggling students, and any student, to work on activities that meet their challenge and interest level.

In cases in which differentiation and in-class intervention is not enough to meet a students needs, the teaching team will decide if the process for EC identification should be implemented. Also, the school will be offering free tutoring. Students not meeting goals will be provided tutoring in addition. Tutoring can be accessed by any student.

Small class size: Allows teachers to give more individualistic attention and prescriptive help to those who need it. Classes will be an average of 17-23 students.

Extra time:

The day at The Expedition School is longer. Of the 7 hours and 15 minutes in the school day, 6.25 hours are dedicated to instruction. Approximately 2 hours and 45 minutes for integrated literacy, social studies and arts, and 2 hours and 30 minutes for integrated math, science and arts are scheduled. This extra time will allow opportunities for more exposure to content areas, more time to practice, and the inclusion of remediation within the regular day for students who need it. The year-round schedule will help all students retain what they have learned and help them not "lose" their learning across long vacations.

Also, the multi-age classrooms will be set up with the expectation that students may stay in that classroom for two or three years. The classrooms will be comprised of a "lower school" or grades K-4, and an "upper school" or grades 5-8. Students will progress through these classes as they meet their objectives for learning, rather than just by age. Therefore, if a student needs more time to learn objectives, up to a whole year can naturally be given. This year will not be a "repeat" year, but a year where students begin from where they are and progress towards mastery of their objectives.

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

1. ELL students will be identified by using a language survey upon acceptance of enrollment. If the language survey indicates a possible need, a family/student interview will take place to further clarify need. If deemed necessary, ELL testing, as provided by the state, will be used.

2. The instructional programs, practices and strategies the school will employ to ensure the academic success and equitable access to the core academic programs for these students mirror those offered to EC students, struggling students, AIG students and all students. They have been clearly explained above, and in the exceptional children section, and include the following:

- A. Inclusion program
- B. Differentiated instruction allows students to work at a pace appropriate for them
- C. Extra time (longer school day)
- D. Small class size (17-23 students)

In addition, The Expedition School will hire an ELL teacher, as capacity grows.

3. The Expedition School will use the assessments as outlined in the instructional program that include nationally normed testing (which helps pinpoint where students are and shows their learning growth), and comprehensive assessment which includes authentic learning tasks, collected in a portfolio to show growth over time. For ELL students (as with all students) the focus is on documenting individual student growth over time, rather than comparing students with one another. Emphasis is on students' strengths (what they know), rather than weaknesses (what they don't know). Consideration is given to the learning styles, language proficiencies, cultural and educational backgrounds, and grade levels of students. Sample assessments appropriate for ELL learners include non-verbal assessments, projects, oral performances or presentations, written products and portfolios. The ELL teacher in collaboration with the general education teacher will determine what particular assessment(s) will be appropriate for each ELL student.

When it is deemed that an ELL student has the age appropriate English language capacity necessary to function at their age and grade, as demonstrated by any (or a combination of) the assessments listed above, the student will be exited from ELL services.

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.

Students in our school will not go through a process to be identified as "gifted." Understanding that intelligence is not a fixed trait, and that students can "get smarter every day" (Carol Dweck, *Mindset*, 2006) students are allowed to progress through the curriculum with the use of differentiated instruction, at their appropriate pace and challenge level. Since our classrooms are multi-age, it will be a common occurrence for different students to be doing different assignments based on need and interest, thus the gifted child will be able to progress at his or her pace naturally. The MAP testing and ongoing pre-assessments prior to teaching will guide teachers to flexibly group students based on need. Our goal is to meet the needs of the students. If a student's needs are beyond what differentiation can meet in the current classroom, the student may be cross-grade grouped, and move into another classroom for a portion of the day. Thus students with needs for advancement, enrichment and extensions, can

receive what they need without the need for a gifted label. This model will provide the flexibility for all students to receive challenging instruction as needed. It will also not use valuable time with unnecessary testing and paperwork, allowing for more instructional time at appropriate levels for students who do not have to wait for "a label" in order to be served. The Director of Curriculum and Professional development will provide teacher training in differentiation practices as they relate to gifted students, as well as training in how to assure projects are differentiated for learning style, multiple intelligences, and various levels of mastery.

Gifted students, like all students, will be monitored using comprehensive assessment. This involves nationally normed (or MAP) testing, which can pinpoint where student levels begin and how much they are growing in their learning. Comprehensive assessment, with artifacts collected in a portfolio will be used.

Portfolio Assessment: In doing project based learning, students will: obtain, comprehend, analyze, communicate, apply, synthesize, and evaluate information across core disciplines. In addition, students will demonstrate 21st century skills such as: collaborating with others, leadership, determination, presentation skills, resiliency, self-reflection, and ability to problem solve.

The skills above and other qualitative elements such as motivation and work habits are not normally tested on standardized tests. Therefore, they will be demonstrated through projects collected in a portfolio. Project rubrics will include ratings of academic growth as well as additional skills mentioned above to help students develop a comprehensive picture of their own progress.

In this way, the monitoring and evaluation of the progress of gifted students will mirror the monitoring and evaluation and progress for all students at The Expedition School.

Since all students will be participating in comprehensive assessment (EC, ELL, gifted, 504, "regular-ed") this will bring more efficiency to the process, and provide a common way for teachers and parents to monitor each student's progress.

### **Exceptional Children**

The public charter school cannot deny admission to any child eligible for special education services as identified under the federal legislation *Individuals with Disabilities Education Improvement Act (IDEA)* Amendments of 2004 (20 U.S.C. 1400 et seq.), IDEA regulations, and Article 9 115C of the North Carolina General Statutes, North Carolina Policies *Governing Services for Children with Disabilities*. All public schools are responsible for hiring licensed and 'highly qualified' special educators pursuant to law. Public schools are required to provide a full continuum of services to meet the unique needs of ALL students with disabilities.

### **Identification and Records**

1. Explain how you will identify students who are enrolled within the charter school that have previously been found to be eligible for special education services or are protected under Section 504 of the Rehabilitation Act.
2. Provide the process for identifying students who may be eligible for special education services as identified in the federal 'Child Find' mandate. Be sure to include how student evaluations and assessments will be completed.

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

1. As stated in the lottery procedures, "No student will be denied based on academic performance or special needs." After the lottery, students who enroll will be polled to see if they currently have an IEP or 504 plan, and this information will be used to help plan positions hired and appropriate student placement. This information will NOT be used to determine enrollment.

2. Students having learning difficulties are allowed to progress through the curriculum using differentiated instruction. EC teachers, along with the Director of Curriculum and Professional Development, will collaborate with general education teachers to help modify instruction and curriculum to meet the needs of struggling learners. If a learner needs more support than is available through what has already been mentioned above, then the following process will be followed.

A. The EC teacher, general education teacher and teaching team collaborate to provide modification to the instruction, curriculum or environment for the student. Progress is monitored.

B. If progress is not being made, the above mentioned team will meet to determine if the student should be offered psycho-educational testing to help pinpoint areas of need. The school will contract with a local testing service or educational psychologist to conduct this testing.

C. After testing, once areas of need are identified, a decision is made by the school team and parents regarding the best educational plan for the student.

D. If deemed necessary, an IEP or 504 plan will be written to address the student's specific needs.

3. The EC teacher will manage his or her own caseload of student paperwork. Time will be allotted in the EC teacher's day for paperwork purposes. The school director or designee will contact students' previous schools immediately upon enrollment acceptance to request records. Records will be kept in a locked file cabinet or locked room at the school. The EC teacher will be responsible for record compliance. The school director will periodically review records for compliance.

#### Exceptional Children's Education Programming

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

1 and 2.

Special education at The Expedition School will include the following:

Least Restrictive Environment

Inclusion Program

Differentiated Instruction

Continuum of Learning appropriate to student

Full-time Special Education Teacher(s)

Contracted teachers to meet special needs such as Speech, OT/PT

Staffing for Special Education:

The Expedition School will open with at least one special education teacher in place who will help manage the above process, and work with students. As stated in the lottery procedures, "No student will be denied based on academic performance or special needs." After the lottery, students who enroll will be polled to see if they currently have an IEP or 504 plan, and this information will be used to help plan positions hired. This information will NOT be used to determine enrollment.

The school will provide assistance to those not performing at expected levels through the use of small class size, differentiated instruction, extra time, and collaboration between special education, ESL and general education teachers.

Differentiated instruction:

TES believes in focusing on students strengths and building a community where all learners can thrive and play their part at a pace that makes sense for them. Differentiated instruction allows each learner to access the learning at their own starting point. Teachers push students from where they are to the next level. This model will serve learners on any level, from gifted students to at risk students. This model is the primary means for serving struggling students. Since instruction can be tailored to meet differing needs, levels and strengths, differentiation allows struggling students, and any student, to work on activities that meet their challenge and interest level.

Student progress is marked on a continuum of learning. Nationally normed (or MAP) testing assists in pinpointing starting points on this continuum. The continuum includes student objectives for a several year span and will show whether a student is progressing towards, or has mastered, particular objectives. Student achievement goals are set by the teacher, the teaching team, including the EC teacher, and as appropriate, with student and parent input.

Expected levels are indicated by the students achievement goals as described above. Students will be working on their objectives at their own pace. Teachers work with students at the students own level. In the multi-age classroom, and with integrated curriculum, there is less pressure to move on in curriculum at a lock-step pace, and more incentive to provide what each child needs when they need it, at the appropriate pace for the child, with the ongoing goal to build student strengths and to move the child onward.

In cases in which differentiation is not enough to meet a students needs, a small-group or individual pull-out model of instruction will be implemented. Also, the school will be offering free tutoring. Students not meeting goals will be provided tutoring in addition. Tutoring can be accessed by any student, not only EC students.

Small class size allows teachers to give more individualistic attention and prescriptive help to those who need it. Classes will be an average of 17-23 students.

3. The Expedition School will comply with IDEA and state legislation to serve special education students. The school will follow a students IEP or 504 plan, regularly assessing and adjusting the IEP or 504 plan as necessary, in collaboration with the students teachers and parents/guardians (IEP team).

4. If specific needs arise that The Expedition School special education teacher is not able to serve, The Expedition School will contract personnel to meet students needs on a per-student basis until the school builds capacity to hire more full-time staff.

Extra time:

The day at The Expedition School is longer. Of the 7 hours and 15 minutes in the school day, 6.25 hours are dedicated to instruction. Approximately 2 hours and 45 minutes for integrated literacy, social studies and arts, and 2 hours and 30 minutes for integrated math, science and arts are scheduled. This extra time will allow opportunities for more exposure to content areas, more time to practice, and the inclusion of remediation within the regular day for students who need it. The year-round schedule will help all students retain what they have learned and help them not "lose" their learning across long vacations.

Also, the multi-age classrooms will be set up with the expectation that students may stay in that classroom for two or three years. The classrooms will be comprised of a "lower school" or grades K-4, and an "upper school" or grades 5-8. Students will progress through these classes as they meet their objectives for learning, rather than just by age. Therefore, if a student needs more time to learn an objective, up to a whole year can naturally be given. This year will not be a "repeat" year, but a year where students begin from where they are and progress towards mastery of the content for that level. To provide consistency and strengthen community, differentiation is the primary means for delivering appropriate curriculum, and students will only need to "move" to a different classroom when their need becomes too great to serve through differentiation.

Our EC students will be served in their least restrictive environment through differentiated learning and collaboration among the teaching team members. Teachers are expected to meet together to plan specific modifications and differentiation targeting specific student needs. EC and ESL teachers are a part of that collaboration. Likewise, the EC and ESL teachers will serve students in the regular classroom as much as possible through team teaching, small group teaching and modification of the activities and curriculum to meet student needs.

With the use of small class size, differentiated instruction, extra time, and collaboration between special education and general education teachers, along with individual goals on a continuum of learning, the needs of EC students can be met.

### **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.

2014-15

Teachers design student centered assessments with at least two major performance assessments to include in the portfolio. Teachers analyze and students self-analyze portfolio and share with parents.

Pending funding: MAP or other nationally normed testing begins Fall and Spring

At least 75% of students show expected growth on their nationally normed tests scores (pending funding)

At least 75% of students meet level III on the EOG test.

At least 75% of students show expected growth in their portfolio work.

2015-16

Teachers add to and refine student centered assessments and portfolio components. Students self-analyze portfolio (with the ability to look back to last years work too) and share with parents.

Middle school portfolio critique circles begin

MAP (or other nationally normed) testing

At least 78% of students show expected growth on their nationally normed scores

At least 78% of students meet level III on the EOG

At least 78% of students show expected growth in their portfolio work.

2016-2019 The assessments will remain the same. Testing targets will increase 2% each year.

2. Because it is also important to document how students are progressing in the multi-age environment, and to provide teachers with further instructional information, and to provide parents with Nationally Normed concrete data of their students growth, The Expedition school will also use MAP (Measure of Academic Progress) testing from the Northwest Evaluation Association (NWEA) or another nationally normed progressive progress test. MAP testing will be administered at least two times per year in fall and spring for all grades K-8 in reading, and math. Science testing will be administered in grades 5-8. These tests help teachers identify students instructional needs, and the Descartes continuum of learning that is an outcome of MAP testing helps teachers pinpoint where students are ready to learn. It is aligned to state standards and helps translate the raw data from the assessment into actionable plans for instruction, grouping and more. MAP testing provides student growth scores. Therefore student growth can be measured, used for instruction, and reported to parents and other constituents.

Portfolio Assessment: In doing project based learning, students will: obtain, comprehend, analyze, communicate, apply, synthesize, and evaluate information across core disciplines. In addition, students will demonstrate 21st century skills such as: collaborating with others, leadership, determination, presentation skills, resiliency, self-reflection, and ability to problem solve.

The skills above and other qualitative elements such as motivation and work habits are not normally tested on standardized tests. Therefore, they will be demonstrated through projects collected in a portfolio. Project rubrics will include ratings of academic growth as well as additional skills mentioned above to help students develop a comprehensive picture of their own progress.

To promote self-reflection and goal setting, students will be instrumental in selecting and analyzing pieces to keep in their portfolio. Self-evaluation is an integral part of portfolio assessment, thus students will be taught to set goals based upon portfolio selections.

At a minimum, two comprehensive assessment or project outcomes that integrate curricular areas (from Fall/Spring) will be saved in a student's portfolio. Students and teachers will analyze the student's growth over time by reviewing the portfolio pieces.

This portfolio review will be presented to parents by each student and teacher as an accountability measure during bi-annual parent conferences.

#### Middle School portfolios:

Middle school students (grade 5-8) will be taught how to participate in critique circles: a group of 5 to 6 students who provide feedback on each other's work. Prior to the critique circle, students create a "personal reflection" detailing what they have learned from that assignment and include questions as prompts for discussion during the critique circle. Monitored by teachers, students develop the ability to go deeper and provide meaningful feedback. After a critique circle, students can elect to further edit their work prior to filing it in their portfolios, or decide to enter the work into their portfolio "as-is."

Eighth graders will participate in the "Eighth Grade Review" during which they showcase their culminating portfolios to teachers, community business members and parents. They defend their learning and prove they are ready to move to high school. Eighth grade portfolios require proof of learning in the 4 core subject areas, plus a successful cross-disciplinary research project.

#### 3. Promotion:

Using a multiage environment, and differentiated instruction, students may remain in the lower school for a longer or shorter amount of time as directed by their individual needs. In order to be promoted class to class, there will be three check-points: End of K, end of grade 2 and end of grade 4, which aligns with when students would change classes in our multi-age environment. In order to be promoted to the next class, students must show they are meeting or exceeding proficiency for the end of that grade, as determined by at least one of the following: EOG testing, MAP testing or comprehensive assessments saved in portfolios. For EC students, they must also meet the proficiency level for the end of grade, or their individual growth level as indicated by their IEP. Each EC student is unique, and the teaching and administrative team will work together to determine a promotion plan if it is determined a unique plan is needed for that student.

The same plan will be used to be promoted in the upper school. Using at least one of: EOG, MAP testing or comprehensive assessments saved in the

portfolio, students must show end-of grade level mastery at two points: end of 6th grade and end of 8th grade. These points align with our multi-age classrooms, and when a student might move "out" of that classroom. In addition, 8th graders will participate in the 8th grade review as mentioned above. These promotion standards will be our exit standards for eight graders.

Promotion criteria will be transparent, and will be communicated in the student handbook and on the website.

### **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.
1. The school will use the Responsive Classroom model to promote effective discipline. This is a proactive, positive discipline model which clearly establishes routines, procedures and incentives for behaving well. It also helps build community and relationships, thus assisting in a positive learning environment. While this model has procedures and policies for dealing with negative behavior, it primarily accentuates and celebrates positive behavior.
  2. The following behaviors are not permitted and will result in suspension and may also result in the contacting of legal authorities as required by law: (The director and governing board reserve the right to consider each offense on a case by case basis.)  
Assault, fighting, making physical threats, robbery, or any other illegal activity  
Sexual Assault  
Issuing a fire alarm or bomb threat  
Possession and/or use of narcotics, alcoholic beverages, stimulant drugs, and drug paraphernalia  
Possession or use of a weapon or other object that could reasonably be considered a weapon.  
Students may not bring knives or other weapons or weapon-facsimiles to school or any school events.  
Leaving the school or failing to attend class without permission  
Act of Hate Violence- Causing, threatening or attempting to cause or participating in an act of hate violence because of another persons race, national origin, religion, disability or sexual orientation  
Noncompliance with a teachers or staff members directive to go to the office because of the students unacceptable behavior.

It shall be a Class I felony for any person to possess or carry, whether openly or concealed, any gun, rifle, pistol, or other firearm of any kind, or any dynamite cartridge, bomb, grenade, mine, or powerful explosive on school property or to a curricular or extracurricular activity sponsored by the school. State law mandates that student violators of this law be suspended for a full 365-day term regardless of the time of year the offense occurs. Also, all violators will be prosecuted.

It shall be a Class I misdemeanor for any person to possess or carry, whether openly or concealed, any BB gun, stungun, air pistol, bowieknife, dirk, dagger, slingshot, leaded cane, switchblade knife, blackjack, metallic knuckles, razors, and razor blades on school property. Students carrying these items will be expelled.

A case-by-case evaluation of possessions or behaviors deemed to be potentially dangerous or disruptive made be done by the school Director along with other school staff.

3. Prior to issuing a suspension or expulsion to a student with EC status, the director will consult the student's IEP to first assure that the school was in compliance the the student's IEP. If the school acted out of compliance with the IEP in a way that directly contributed to the behavior under consideration, the student will not be suspended or expelled.

4. Appeal Process for suspension and expulsion

Students and parents have a right to:

Know the school's rules ahead of time, as published in this handbook and created by the students class or teacher

Meaningful notice of the misconduct charged against the student either orally or in writing

An explanation of the evidence against the student, including the specific incidence involved

An opportunity for students to tell his or her side of the story

The exact number of days of the suspension, and when the suspension begins and ends

If the parents wish to appeal the suspension, a specific date, time and location of a hearing with the director where a parent can appear and challenge the suspension will be provided. An expulsion may be appealed before the school board.

If a student's actions present an immediate danger or disruption to the academic process, the child can be immediately removed from the school without advance notice to the parents, but the parents will be notified of the incident as soon as possible.

**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:* The Expedition School, Ltd.

*Mailing Address:* 208 Goldfinch Ct

*City/State/Zip:* Mebane NC 27302

*Street Address:* 208 Goldfinch Ct

*Phone:* 919-609-4026

*Fax:*

*Name of registered agent and address:* Tammy Finch  
208 Goldfinch Ct  
Mebane, NC 27302

*FEDERAL TAX ID:* 46-1173529

**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)  
X 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.

<b>Board Member Name</b>	<b>Board Title</b>	<b>County/State of Residence</b>	<b>Current Occupation</b>
Eric Butler	board member	DURHAM	attorney
Velinda Hatcher	board member	DURHAM	retired teacher

Laura Brightwood	board member	ORANGE	Social Worker
Terri Carbre	board member	ORANGE	marketer at SCANA Energy
Steve Holdaway	board member	ORANGE	Owner of Solar Academy
Patricia Brummitt	board member	ORANGE	Owner of Chapel Hill Moving Co, Inc
Tammy Finch	board member	ORANGE	teacher

**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.*

Governance structure: See appendix page 61. The board is over the director, who is over the curriculum director, staff, parents and community. The curriculum director is also over the staff, parents and community.

The Board is committed to the education of all students to the best of their individual abilities and in alignment with the education plan outlined in the charter; to a constant awareness of the concerns and desires of the community regarding the quality and performance of the School with the Board assuming a governance leadership role; and to the employment of school personnel who, under the direction of the Director, will see that the school maintains an outstanding position and will carry out the policies of the Board with imagination and dedication.

Additionally, the Boards goals are:

- To interpret the education needs and aspirations of the community through the formulation of policies which stimulate the learner and the learning process, in accordance with the mission and philosophy of the school;
- To govern the school in accordance with federal and state laws;
- To provide leadership in order to carry out the goals and objectives of the school effectively;
- To facilitate communication with the community served by the school
- To analyze and use data appropriate for the management functions of planning, evaluating, organizing, controlling and executing the best financial, policy and hiring decisions.
- To set long term goals that help the school to reach its full potential.
- To be fiscally responsible and oversee the school's budget, making financial decisions that are in the best interest of the students and that meet the mission of the school.

Director:

TES Director will be recruited using on-line job postings, school website, and professional/charter list serves. TES has a multi-step process in order to find a Director best suited for his/her role at TES.

1. Candidate submits a resume, cover letter, and writing prompt.
2. A first interview is conducted over the telephone. Predetermined questions are set in all key areas of leadership of a charter school. The interviewer uses a rubric to scores candidates answers. Candidates are "no,yes, or hold".

3. An in-person interview is conducted using the same method above. In addition, the candidate is given a writing prompt/task to complete before the interview. The candidates are made aware that they will have this assignment, but they are not told in advance what the task will be. This is to determine the candidate's ability to think quickly as well as how knowledgeable (s)he is about the important topic given in the task. Candidates interview with the full board (once established, possibly parents and teachers) and are asked questions that cover the many duties/roles of the Director. All members of the interview score the candidate on a rubric. Scores are averaged and discussion takes place. If deemed necessary, a second interview may be made.
4. A majority vote on the most viable candidate(s) is made.
5. Contract is sent to candidate.

The board will use the NC Administrator evaluation or a similar evaluation that matches the mission of our school to review the director. The board will also conduct periodic surveys of students, staff and parents regarding the director. The board will also use the school's achievement goals, presented by the director, as a part of the director's evaluation. (The director presents testing data, reports of project-based learning, and comprehensive assessments in portfolios as samples of how the school is meeting it's mission each year.)

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.*

Board size: 5-7 members. We currently have a diverse representation of skills on our board, including expertise in: education, business, finance, legal, and social work. In addition, our board consists of a combination of educators, parents and community members committed to the mission. We understand that a strong finance committee will need to be in place at all times in order to ensure that the school is maintaining financial stability as well as planning ahead for the long term well being of the school and its goals. Our goals are to maintain a similar diversity of skills and expertise with the addition of a fundraising expert as well as an additional finance expert or past school administrator.

a) The board has put together a rigorous hiring process for the director as described in the previous section. A strong school leader will aid in the success of the school both educationally and operationally. Our current board composition has key areas of expertise covered. The strong education arm of the board is setting the bar for a rigorous hiring process that aims to find the most qualified staff to ensure the school's educational goals are met. Our finance committee knows and reviews the school's budget regularly to maintain a solid view of the school's financial standing. Decisions made by the board are always met with an analysis of financial impact.

The board has developed committees to tackle the many tasks and policies involved in opening a charter school and overseeing a charter school. Tasks are matched with board member expertise. Committee findings are reported during board meetings and decisions are made accordingly. Our diverse

composition of skills and expertise help the board to divide and conquer and run efficiently.

b) The diversity of the board will allow it to evaluate the school's progress toward its goals. The director and curriculum director will present test score reports and examples of project based learning to the board yearly. Educators on the board will help the board interpret these data points. Financial and legal expertise on the board will assist in helping the school achieve its financial goals, and maintain ethical practices throughout. A social worker on the board will assist the board in reviewing the success of the school's Responsive Classroom and character building goals. Parents on the board will assure the board is "hearing" the needs of the parent community. We also maintain an advisory council that includes a Hispanic Community Liaison, who is fluent in Spanish and able to assist with communicating with the Spanish speaking community to assure they are represented. A classroom teacher will also be invited onto the advisory council to represent the voice of the teachers. While the advisory council does not vote, it will help assure voices are not left out of the decision making process. The diversity will be an asset when evaluating the school leadership.

c) The board will retain at least one position on the board for a parent representative and actively work to recruit community members to fill positions as they open. A parent association will be established at the school. This association will have a non-voting advisory representative who will report parent views and ideas to the board for consideration and act as a liaison between the board and parents.

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?*

Recruitment:

The board began with two educators who created the mission/vision of the school as well as wrote the charter. Additional board members have been recruited via our website, which has been up since 2011, and by word of mouth.

1-Each potential board member completes a board application where they indicate why they want to serve on this board and how he/she can contribute to the success of the school. In addition, there is space to list areas of past experience and expertise.

2-Each person submits their resume.

3-Once the resume and board application are reviewed, an existing board member conducts a phone interview to further gather information that helps to determine how this person will/will not be a good fit for the board.

4- An in-person meeting takes place for viable candidates where the existing board members further evaluate: general "fit", knowledge of the charter, knowledge of the role of a school board member, commitment to the school's mission/vision, time commitment, bylaws, and specific skill sets that will be useful and strengthen the board.

Vacancies:

\*Each board member agrees upon signing on that he/she will help to recruit a replacement should their term need to end sooner than planned. The board will keep on file past applicants that may be a good fit in order to have a head start on potential replacements. A timeline of board memberships will

be maintained in order to plan ahead for vacancies in an effort to prevent vacancies. If a board position becomes available, the board will work to fill the position ASAP. The same rigorous process described above will be used to select new members. The open position will be posted on the school website, and current board members will reach out to the community to recruit new members. Additionally, an advisory board members will be in place and may be called upon to help support the board in a non-voting capacity.

4. *How often will the board meet?*

Monthly after opening. Minimum of monthly and likely more in start up phase.

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).*

Our current board has attended all of the Office of Charter School Trainings due to our desired opening in July 2013. These trainings have strengthened our board's knowledge of the scope and duties involved in overseeing a charter school. We have already set a policy that each board member will view the board training webinars offered by Thomas Miller at the Office of Charter Schools. We have already implemented and started this policy, now that the webinars are available.

Board Training:

1-The free board training sessions from the OCS are archived on the web and each new board member will be expected to view these archived sessions within the first 8 weeks of joining. A short writing assignment will accompany each session in order to evaluate the new member's understanding of the board roles, responsibilities.

2-Each board member will be required to know and be able to explain the long term goals of the school, the vision, the measurable goals for student achievement.

3-TES board will keep up-to-date a binder that includes:

- Charter application
- Charter
- Bylaws
- Policy manual (Board/Staff/Students)
- Open Meetings Laws
- Charter School Law
- Public School Law
- Expectations as a member
- School measures
- Hiring Process

Each board member will be expected to be knowledgeable of these various documents and must be able to quickly refer to them as needed.

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.*

If any member of the Board faces a conflict of interest in a matter pending before the Board, such member shall make full disclosure to the Board of the nature of the conflict. Upon full disclosure, the Board may approve the transaction only by the majority vote of Board members having no conflict of

interest. However, no such transaction may be approved if it would constitute self-dealing, prohibited under Section 491 of the Internal Revenue Code of 1986, or the corresponding provisions of any later federal tax laws, or if it would result in the imposition of any excise tax under any other provision of Chapter 49A of the Internal Revenue Code of 1986, or the corresponding provisions of any later federal tax laws.

At the present time, there are no foreseeable existing relationships that pose actual or perceived conflicts. If a conflict of interest should arise, and any member of the board is aware of it, that member is responsible for speaking out and discussing the perceived conflict of interest. If there is question or disagreement regarding the perceived conflict of interest, the board will then agree or disagree regarding whether or not a conflict exists by conducting a vote. If not enough information is available, the agenda item in question will be tabled until further information is researched and presented.

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

The board will use a majority vote decision making process. Decisions can be modified via discussion prior to a vote. The Board, when it deems it necessary, may seek out the counsel and opinion of qualified professionals in making its decisions. In the event of a serious grievance or disagreement, the Chair of the Board will appoint a committee that includes teacher representatives, parent representatives and Board of Directors representatives to research the issue and recommend a solution. This recommendation will be put before the Board of Directors for a final determination.

*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 advisory board will consist of individuals interested in helping the school in an advisory capacity. The advisory board will provide advice to the Board of Directors on a request basis, and are not considered Board of Director members, thus do not have voting power on the board. The advisory board is not required to attend board meetings. Children of advisory board members are not guaranteed enrollment in the school and must use the schools application process, if they wish to enroll. The Advisory Board enhances The Expedition Schools Board of Directors ability to make informed decisions regarding the school by providing expertise and advise in particular special areas. Advisory Board members are not liable for Board of Director decisions.

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

**Include in the Appendices:**

9. A well-defined organizational chart showing the relationship of the Board of Directors to the parents and staff of the proposed charter school. This chart should also include lines of authority to and from any outside entity that will play a role in managing or supporting the charter school (such as educational service providers, advisory bodies or parent/teacher councils).
10. A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix E).
11. The proposed by-laws, which must include a Conflict of Interest Policy for board members and a stated commitment to the NC Open Meetings Law (Appendix F).
12. A copy of the articles of incorporation, if available. If not available, this document must be

*available prior to interview by SBE, the applicant must demonstrate that it has been applied for prior to submission of the proposed application. (Appendix G)*

13. *Copy of any board policies if adopted already (Appendix H).*

14. *Copies of meeting minutes (if available), relevant to the development of the charter school plan, during the application process (Appendix I).*

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

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

**X Not Applicable**

**Private School Conversions: complete ONLY if the proposed charter is a private school conversion. Otherwise, mark "Not Applicable" and follow the direction #3 in the Application Specifications.**

**X Not Applicable**

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

**X Not Applicable**

### **Projected Staff:**

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

### **Staffing Plans, Hiring, and Management**

Include the following information for the proposed charter school:

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

\*TES already has numerous applications for employment. Several highly qualified teachers have already completed our rigorous application process in anticipation of our July 2013 opening. We are entering discussions with these individuals to encourage them to remain applicants for a 2014 opening.

In addition to methods listed in the "Marketing to the General Public" section, TES will make a specific effort to reach potential teachers, directors, and other staff for the school. Once candidates are identified, the board will conduct an application and interview process that fits each specific job description. The board of directors will hire the school director. The School director and Director of Curriculum and professional development will be on the hiring team.

Website: The school will list employment opportunities on the site, with the ability to apply online.

Education Job Fairs: Representatives of TES will be aware of and attend local and/or state education job fairs to find teachers and other staff.

Advertisements: The Expedition School will advertise available positions on key teacher-hiring websites such as teachers-teachers.com, as well as in newspapers and parenting magazines.

Open Houses for Teacher/Staff Recruitment: TES will have at least 2 pre-marketed open houses for interested teachers and other school personnel. These will be held in the Orange County area.

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 charter school employees will be employees of the non-profit organization, The Expedition School, Ltd. The board of this organization will hire the director, and the director, along with select team members which may or may not include other board members, will hire the other staff. In the absence of a director, a committee of the board will hire staff. The employees will be supervised and evaluated by the director and curriculum director of the school. The board will approve any hiring or dismissal of employees.

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

Criminal background checks of all personnel are required by law and will be conducted on all applicants for board, faculty, staff, administrative, and volunteer positions.

Hiring procedures:

1. Resume, cover letter and writing sample screened using rubric.
2. Phone interview, screened using rubric.
3. Additional submissions screened using rubric. (Example: teachers submit an outline of an integrated, project-based unit and a lesson plan)
4. In person interview, school tour and meeting the team. 5 minute "content" lesson done in person.

Dismissing school personnel:

EMPLOYMENT AT WILL

Employment with TES is voluntary and the employee is free to resign at will at any time, with or without cause. Similarly, TES may terminate the employment relationship at will at any time, with or without notice or cause, so long as there is no violation of applicable Federal or State law. However, employees are requested to give a minimum of two (2) weeks notice. In the event it becomes necessary to discipline an employee, the following steps of discipline may occur at the discretion of the School:

1. Verbal warning
2. Written warning
3. Final warning and/or probation
4. Suspension without pay
5. Termination

The School retains the discretion to determine if the circumstances of a particular case warrant termination for the first offense, or whether one of the other three forms of disciplines listed above is warranted. Further, if an employees conduct, performance, work habits, attitude or demeanor becomes unsatisfactory or unacceptable in the judgment of the School, including based on violations of any School policies, rules, guidelines, regulations, or rules of conduct, employees will be subject to disciplinary action up to and including termination.

The school will use a fair performance evaluation system upon which teachers can comment. If performance is in question, clear growth goals will be set and fair time given to attain them, prior to dismissal.

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

It is the intention of the board at the writing of this application, to offer the State Health Plan and the State Retirement Plan to all full-time employees. Details of the employment benefits listed below can be found in the staff handbook.

A list of these benefits include:

Health Insurance

Supplemental Insurance

Section 125 plan

Retirement

Workers Compensation

10-11 paid holidays (depending on which day of the week Christmas falls)

10 annual leave vacation days (not accumulated year to year)

Jury/witness duty leave

Bereavement leave

Family Medical Leave (including maternity leave)

Leaves of absence (at discretion of the board)

Personal and sick leave (10 days, or 80 hours per year, not accumulated year to year)

Military Leave

Educational Leave

Compensatory Leave

Incentive pay for extra duties

Salary Ranges:

Director: \$70,000-80,000 per year, 12 month salary

Curriculum Director: \$60,000-65,000 per year, 11 month salary

Teachers, technology Specialist, counsellor, nurse: Average of \$42,000 per year (plus or minus) depending on years of experience and level of education earned.

Teaching Assistant: \$20,000 depending on experience

Secretary: \$30,000-\$45,000 depending on expertise

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

Employee termination procedures are detailed above in the "dismissing employees" section.

Grievance:

Any person with a grievance about employment or dismissal should provide a written complaint to the director within 15 days of the grievance. The written complaint must, at a minimum, contain the following information:

1. The name of the individual(s) filing the complaint;

2. A description of the complaint, and any unconsidered evidence

3. The signature(s) of the individual(s) filing the complaint;

The person(s) making the complaint should have either directly experienced or observed the incident, person or event the grievance is about.

They may approach any staff member to help them bring their complaint to the director.

The Director will:

1. Verify that the complaint is properly filed.

2. Forward the grievance to the board within 5 business days.

3. Inform the person(s) making the complaint of:

a. the process by which the complaint will be investigated and the

confidential  
nature of that process;

If possible, the director, curriculum director and one school member (grievance committee) will evaluate the complaint. A resolution may be reached. If not, the grievance and the result of the grievance committee's work will be submitted to the board for a final decision.

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

At this time, The Expedition School will ask a teacher representative to be a non-voting advisory member of the board. This will be a volunteer position each year.

The Director and/or Curriculum Director may also serve as voting members of the board. If this takes place, the board will use the policies in place in the bylaws to assure no conflict of interest occurs.

The teachers, director and curriculum director will be paid for their school duties via funds received from the state. Board members do not receive payment for the act of serving on the board. Board service is a voluntary position for all members.

*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.*

As described in the Exceptional Children's section of this application, The Expedition School plans to use differentiated instruction, small class size, a longer school day, and multi-age groupings to serve the needs of all students, including EC, ELL and gifted learners. The school also plans to have 1.5 EC teachers on staff in year 1, and to add EC teachers as needed to serve students who have needs that can not be met with differentiation alone, and whose IEP plans require pull out, small group or one-on-one instruction. The school plans to contract for speech, OT and PT services. The school plans to hire a part or full ELL teacher if a need is determined by language surveys collected at enrollment. Gifted students will be served in the general-ed classroom through differentiated instruction, small class size and a multi-age environment allowing students to be challenged at their own level.

*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).*

At The Expedition School we believe having a dedicated teaching staff is paramount to the success of our students and school, and the Federal standards for Highly Qualified teachers will be followed. A Baccalaureate degree or higher and proven experience/aptitude in the subject(s) being taught will be required.

Teachers will be required to meet the standards set forth by NC Law for teachers in a NC Charter school (75% licensed in grades K-5, 50% licensed in grades 6-12 in the subject areas where they are teaching) as well as those set by No Child Left Behind (NCLB) legislation, which requires teachers in core subject areas to meet Highly Qualified standards. The Expedition School will assist teaching candidates to become NC licensed and highly qualified, as necessary, including reciprocity agreements, lateral entry, and alternative national licensure programs.

School Director Job Description

The School Director will serve as a lead partner with the teaching staff and clerical staff. The director will be responsible for reporting to the Board of Directors. The Director will operate according to the mission and philosophy of the school.

A highly qualified candidate will:

Have 3 or more years of successful school administrative experience.

See children as full of strengths, energy, and curiosity

Have a growth mindset

Articulate and provide leadership to achieve school philosophy and policies

Provide leadership for the schools short and long-term planning, including strategic planning and report to the board of directors

Provide professional support as needed, respond to areas of need

Help to hire and integrate new staff

Coordinate with Curriculum Director to observe and assess staff throughout the year and provide on-going feedback and end-of-year teacher review.

Serve as a liaison to State Board of Education and NC Charter School office

Coordinate with Curriculum Director to interpret effectiveness of assessments and interpret scoring

Respond to parents

Support teachers with regards to discipline issues

Respond to serious discipline issues as needed

Communicate regularly via a Directors newsletter/blog

Monitor budget and budget planning (work with Board of Directors)

Set fund raising goals

Help ensure the safety of students and staff

Desired, but not required: Have experience with STEM education or project-based, experiential learning. Have experience with multi-age groupings

The director of curriculum and professional development will supervise, support and train teachers to achieve the schools goals.

The Curriculum Director will

Have experience coaching teachers

See children as full of strengths, energy, and curiosity

Have a growth mindset

Report to the School Director

Articulate and provide leadership to achieve school philosophy and policies

Have experience and expertise in project based and experiential learning and possess an ability to train others in this area

Have experience in, or willingness to learn about multi-age classroom instruction

Initiate kindergarten through grade eight leadership for curriculum planning, curriculum mapping, development and implementation of project based and experiential learning.

Administer, coordinate and supervise the instructional program of the school, by cooperatively working with the principal and faculty.

Regularly observe classroom instruction, provide teachers with feedback,

Assist in the development of the annual budget by preparing cooperatively with the principal and faculty the curriculum and instruction portion of the budget.

Approve the selection of instructional materials through proper channels

Keep the curriculum and instruction programs up to date with particular emphasis on evaluating new developments in STEM, project-based, and experiential instruction.

Coordinate and/or lead a program of orientation for new teachers and in-

service training for experienced teachers.

Attend Board meetings

Teacher Job Description (K, 1-2, 3-4, 5-6, 7-8)

A highly qualified candidate will:

Have a bachelors degree and be certified in the grades taught

See children as full of strengths, energy and curiosity

Have a growth mindset

Be able to uncover student strengths and utilize these in differentiated learning experiences that address multiple learning modalities, multiple intelligences and multiple achievement levels.

Be a learner, flexible and willing to grow

Work to achieve school philosophy and policies

Be able to collaborate with other staff

Utilize effective classroom management techniques in a multi-age classroom

Attend weekly staff development and/or meetings during designated school hours

Attend necessary IEP/Special ed meetings

Communicate regularly and effectively with parents

Be willing to have an "open-door" classroom where parents, prospective parents, and staff members can observe regularly

Participate in the schools after-school tutoring program one hour per week.

School Clerical Office Manager Job Description

To assure the smooth and efficient operation of the school office, to assist in the administration of the schools business affairs so as to provide the maximum impact on the education of the children and services for the financial resources available.

Special Education Teachers (K-4) (5-8)

Within the education model at The Expedition School, special education students are included in their least-restrictive environment.

In addition to the qualities listed under "teacher" above, a highly qualified candidates will:

Attend necessary IEP/Special ed meetings and provide leadership at those meetings

Keep all special education paperwork updated, complete and secure.

Communicate special education students IEP goals to teachers and parents.

ESL teacher

Within the school's model, ESL students are included in their least-restrictive environment. A highly qualified candidate will:

In addition to "teacher" qualities listed above:

Be able to collaborate with other staff, and purposely collaborate with staff to meet the needs of ESL students within the regular classroom setting

Keep all ESL paperwork updated, complete and secure.

Communicate ESL students goals to teachers and parents.

Conduct any necessary ESL testing and screening

Specialist/ Electives Teachers

Physical Education, Music (Chorus, band, Spanish, Technology)

Be an expert in your field.

Work to achieve school philosophy and policies

Bachelors degree required

Teaching certificate preferred

#### Teaching Assistant (K-4) (5-8)

The Teaching assistant will be scheduled to complete tasks created by their grade-span team. These tasks may include but are not limited to

Photocopying

Working with small groups of students

Working one-on-one with a student

Supervising the transition of students to and from special classes

Organizing learning materials

Covering a class in the absence of a teacher

The Teaching assistant will also be available to substitute teach a class in the event a teacher is absent and another substitute teacher is not available.

#### School Counselor

The Expedition School also offers an exceptional school environment program that focuses on students social/emotional development. This program utilizes morning meetings at all levels with focused work on students social/emotional growth. An important aspect of the schools environment is peer mediation. The school counselor will lead in the implementation of the social/emotional development program, and will lead the peer mediation program, training students as peer mediators. The counselor will also meet with individual or small groups of students as needed, and coordinate school testing efforts.

#### School Nurse

Must be a registered nurse. Maintain each student's health plan and keep health records, medications and information up to date. Assist with the social-emotional curriculum. Assist with student health related issues.

#### **Staff Evaluation and Professional Development**

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

The director, curriculum director and executive secretary will work together to maintain and monitor teacher licensure requirements and professional development.

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

The Expedition School will mentor all staff by pairing staff together, more with less experienced staff, and building professional learning community teams of staff who collaborate together. The Curriculum Director will regularly visit classrooms and provide formative feedback to all staff members, and plan and implement staff development based on staff needs and the school's mission. The Curriculum Director will also co-teach, demonstration teach and help plan lessons with staff who need additional mentoring, building the potential for all staff to teach exceptionally when coached in effective teaching methods. Our rigorous hiring process will help us bring in staff who match our school's vision and teaching philosophy, and we want to invest in those people to make our school the best it can be.

#### Staff Evaluation:

Staff will be evaluated using either the NC teacher evaluation tool or another tool more aligned with our school's mission. Initially licensed

teachers will be evaluated using the NC teacher evaluation tool, in order to assure their initial licenses can become professional licenses. The board retains the right to use another tool for any professionally licensed staff member. The board will be reviewing project-based learning and student portfolios as a part of evaluating the school's education program as a whole. Staff will be expected to conduct a minimum of 2 projects the first year, and collect student artifacts and assessment items in a portfolio. These elements (project-based learning and comprehensive assessment with portfolios) will also be a part of the staff's evaluation.

#### PERFORMANCE EVALUATION

Supervisors and employees are strongly encouraged to discuss job performance and goals on an informal, day-to-day basis. The Director, principal, curriculum director, and designated senior staff members will formally appraise all teachers at least twice per year; first year and ILT teachers will be appraised at least three times a year. This will include establishing criteria against which performance is measured, communicating with teachers about their performance, and establishing goals for the next year. Teachers will also be asked to comment on their appraisals and provide signatures acknowledging that the appraisals were discussed. All appraisals will be kept in employee files. Personnel assigned to Mentor/Mentee relationships will be responsible for procedures, records, and other materials.

Additional formal performance evaluations are encouraged to provide both supervisors and employees the opportunity to discuss job tasks, identify and correct weaknesses, encourage and recognize strengths, and discuss positive, purposeful approaches for meeting goals.

School-wide performance evaluations (for non-teaching and non-Director positions) are scheduled annually. TES may award merit-based adjustments in an effort to recognize truly superior employee performance. The decision to award such an adjustment is dependent upon numerous factors, including the information documented by this formal performance evaluation process and the Schools financial standing.

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

The core components of the professional development plan include:

1. Differentiation: Differentiation training for teachers will not only help teachers serve gifted students in their classrooms, but will provide also provide teachers with the tools needed to differentiate the curriculum for all learners while focusing on students strengths. Differentiation strategies will prepare teachers to work in a multi-age environment, designing appropriate experiences for each level of learner. Differentiated instruction will provide teachers with strategies for designing projects that include all levels of students.

2. Responsive Classroom: Bringing teachers in to the Responsive Classroom model at the onset of the school will help strengthen the schools community atmosphere and move forward towards achieving its character building goals. At a minimum, teachers will learn the basics of the classroom "morning meeting," positive teacher language, and the CARES character traits.

3. Project based learning: One of the schools focuses is on using project-based learning with a STEM focus.

4. MAP testing and using MAP scores: students in multi-age classrooms

progress along their own learning continuum. MAP testing provides results that show where students need to learn along the Descartes Continuum of Learning to reach their optimal challenge level. This training will aid teachers in interpreting and using this data to increase student learning.

5. Common core and literacy training: Our school will use the Common Core Standards. Teachers will need to be more than familiar with these Standards in order to develop integrated projects that address each one.

6. STEM and inquiry: We are a STEM school.

Most training will be conducted in-house by the Curriculum Director on early release days. Some responsive Classroom training will be external.

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.*

Day 1

AM

Get to know you ice-breakers

Review and research Buck Institute for Education Project Based Learning model. Teams focus on one aspect of model and present learning to group. Teachers will be informed that two project-based units will be required this year. Teachers will continue their learning about PBL, and each week, during the delayed opening, work towards planning and implementing at least one PBL unit by the winter holidays.

PM

21st century learning. What it looks like and where it is in Project Based Learning.

Teams gather to create a rubric for what 21st century learning would look like at their grade level. Teams meet cross grade to compare rubrics and create continuum of 21st century skills for use at The Expedition School.

Day 2

All day

Big Ideas and integrating curriculum using the Common Core and NC Essential Standards

Teachers discuss big ideas such as "Change, sustainability, conflict" that help connect all curriculum. Teachers decide on one big idea to use across the school the first year. Teachers review the common core for their grades or area and record where objectives connect to the big idea.

Teachers create a "connections" map, showing places where cross-curricular integration makes sense in the common core and NC Essential Standards. Using curricular resources on hand and their connections maps, teachers organize the information into a sequence that makes sense for the first 9 weeks. Teachers highlight or "check off" which objectives are being covered the first 9 weeks.

Day 3

AM

Differentiation and comprehensive assessment. Helping kids start from where they are and to grow as much as they can. Using formative assessment and portfolios to show growth.

PM

Using differentiation in reading instruction.

Reading instruction guidance

Teams work together, using curriculum sequence and connection maps, to plan reading instruction for first 9 weeks of school.

Day 4

AM

School-wide social and emotional learning and positive behavioral model using "Responsive Schools."

PM

School safety: arrival and dismissal, fire drills, tornado drills, lock-downs, blood-borne pathogens

Day 5

AM

Review of book "The 5 Practices" an innovative way to teach math using complex problem-solving and an overview of the math resources available to use to teach math. Ways to teach math in a project-based model.

PM

Teams plan out daily schedule, reviewing students with special needs.

Day 6 and 7

Teachers work in classrooms

This plan will provide a solid introduction to the main practices, methods and curriculum the teachers at The Expedition School will be expected to use. Teachers hired at the school are screened and bring in expertise in at least one of the areas listed above. Mastery of the all items listed above are not expected after just 5 days, therefore, teachers will be continuing professional development each week during an early release day. Teachers will also be meeting weekly with their professional learning community to plan together and work on designing learning that aligns with the mission of the school.

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.

Staff development at The Expedition School will include the following:

Led by the Director of Curriculum and Professional Development, or by contract vendors

Focus on the teachers and students current needs

Be aligned with the schools mission

Staff development will be implemented weekly on the early release day. One day per week, students will be released 2 hours early. (The Expedition School has a longer day, so the early release will not decrease student hours as compared to a traditional public school). Similar to Voyager Academy in Durham, students will have the option of going home or attending numerous extra curricular offerings on this day for students. Weekly staff development will help strengthen staff skills and empower staff to grow as educators.

Staff development plans will be reviewed yearly and adjusted based on staff and school needs.

These trainings will meet or exceed NC's requirements of: 1 renewal credit for literacy

1 renewal credit in the specific academic subject area and 5.5 general

credits (as determined by the LEA, if employed), not to include years of experience.

Staff Development Plan:

1. Differentiation training-- Year 1

Differentiation training for teachers will not only help teachers serve gifted students in their classrooms, but will provide also provide teachers with the tools needed to differentiate the curriculum for all learners while focusing on students strengths. Differentiation strategies will prepare teachers to work in a multi-age environment, designing appropriate experiences for each level of learner. Differentiated instruction will provide teachers with strategies for designing projects that include all levels of students.

Ongoing differentiation training will be tailored to specific teacher/grade level needs and projects. This will be provided by the Director of Curriculum and Professional Development.

1A. Responsive Classroom - Year 1

Bringing teachers in to the Responsive Classroom model at the onset of the school will help strengthen the schools community atmosphere and move forward towards achieving its character building goals. At a minimum, teachers will learn the basics of the classroom "morning meeting," positive teacher language, and the CARES character traits.

1B. Project Based Learning Introduction - Year 1

One of the schools focuses is on using project-based learning with a STEM focus. Teachers will benefit from support and development in this area to become expert teachers using project-based learning.

2. Project Based Learning with a STEM focus--Year 2

One of the focuses of our school is on using project based, integrated learning with a STEM focus. Teachers will benefit from support and development in this area to become expert teachers using project based learning.

2A. Comprehensive assessment and nationally normed test training -Year 2

This item will be started in year 1 if funding is available. At the Expedition School, students in multi-age classrooms progress alongtheir own learning continuum. Comprehensive assessment and MAP testing provides results that show where students need to learn along a Continuum of Learning to reach their optimal challenge level. This training will aid teachers in interpreting and using this data to increase student learning.

2B. Responsive Classroom Training: Continuation

Further developing teachers responsive classroom techniques will continue to strengthen the schools community atmosphere and character building goals, as well as promote positive student behavior.

3. STEM and Inquiry Learning-- Year 3

Training in STEM and inquiry learning will help develop teachers in-depth knowledge of these topics and help teachers design projects that use inquiry methods.

4. Common Core training, (including literacy): ongoing

Our school will use the Common Core Standards. Teachers will need to be

more than familiar with these Standards in order to develop integrated projects that address each one.

### **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 Diversity at TES

General Marketing Tools: TES will reach all groups of the population by using a variety of methods.

1. Public meetings in or near various neighborhoods.
2. Advertising via website and facebook
3. Advertising via print materials
4. Outreach at community farmers markets
5. Outreach at meetings in local black neighborhoods.
6. Outreach via home meetings in local Hispanic neighborhoods, led by the school's Hispanic Liaison
7. Outreach via newspaper articles and advertising
8. Open houses and tours (once facility is ready)
9. Fund-raising community events

Transportation: TES is committed to providing transportation. The board of directors will make it a priority to plan for and seek out funding in order to ensure that transportation will be a reality for those who need it. For example, The Expedition School will work to organize ride-sharing and carpooling, and "walking-buses" (if we are located in the midst of homes or apartments) in neighborhoods. The Expedition School will set aside funds each year to save up for van or bus transportation options. Any student with transportation in his or her IEP will receive a ride to school.

Spanish-Speaking Liaison: TES will have an employed or volunteer Spanish-speaking person(s) to translate documents in order to make information accessible to the Spanish-speaking population in the local area. In addition, this person will be aware of specific venues and ways to market the school to the Hispanic community. The website has all key pages translated into Spanish.

#### Food:

To attract and serve the needs of low SES families, The Expedition School is dedicated to providing a daily meal to those who need it. We have set aside some funding to start, and will work with the school's PTA to build up funding to assure all students are fed and ready to learn. A pantry of non-perishables will be created to help subsidize (or provide) low SES student

breakfast.

## **Parent and Community Involvement**

1. *Describe how you will communicate with and engage parents and community members from the time that the school is approved through opening.*
2. *Describe how you will engage parents in the life of the public charter school. Explain the plan for building engaging partnerships between the family and school that strengthen support for student learning.*

1. The Expedition School will maintain an ambitious marketing campaign each year with special emphasis on targeting a diverse population of applicants. We currently have over 200 parents that have requested to be on our email list via our online "Interest Survey". We have a following on Facebook as well (200 "likes").

Website: TES will maintain a website where people can learn what is being offered at TES, provide feedback, stay up to date about the progress of the school, and get in touch with board members.

Open Houses: Once the school is open, we will maintain an open door policy and allow parents and the public to tour and view the school at work. Scheduled visits by prospective families will be facilitated at least 2 times per quarter. The public will also be invited to attend exhibitions of the students work at the culmination of a project.

Fund Raising Community Events: TES will hold at least one fund-raising event where the community is invited to participate. Examples of this kind of event include a Strawberry Festival, a School Carnival, etc. During these events the public will be welcomed to attend and enjoy festivities. In this way the school will be making a positive impact on the community, and developing positive relationships.

Meet the teacher night: New families entering the school will be invited to a meet the teacher night to help them begin to integrate into the school "family."

2. We are committed to encourage exceptional parental and community involvement. We require 2 hours of parental involvement per month. Our volunteer coordinator organizes these efforts. TES has adopted this policy in order to foster a school a community that works together. Parents are invited to participate in various ways in order to maximize TES success by using their time or expertise to help the school and/or students. Our website survey lists the various ways in which parents are invited to volunteer their time. We already have many families ready to help.

Parents will be invited to form their own PTA. One parent member will represent TES families on the board in a non-voting capacity. The PTA will function to be supportive of the school's mission, raise money and foster school community.

TES staff commits to regular and quality communication with parents regarding their child's school experience through conferences, regularly updated class websites, and invitations to class events to enliven the project based learning model.

## **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.*

At The Expedition School, any child who is qualified under the laws of the State for admission to a public school is qualified for admission to a charter school. As per Charter Law, The Expedition School shall not discriminate against any student on the basis of ethnicity, national origin, gender, sexual orientation or disability. Except as otherwise provided by law or the mission of the school as set out in the charter, the school shall not limit admission to students on the basis of intellectual ability, measures of achievement or aptitude, athletic ability, disability, race, creed, gender, sexual orientation, national origin, religion, or ancestry. Notwithstanding any law to the contrary, The Expedition School may refuse admission to any student who has been expelled or suspended from a public school under G.S. 115C-391 until the period of suspension or expulsion has expired.

The school will open the application submission window, in January 2014, and will close it by the end of February 2014, or in line with other charter school enrollment dates. If necessary, an open, public lottery will be held in March 2014. Notices of the application period will be published, posted and advertised as per NCGS 143-318.12. The lottery will be conducted in a public forum. At this time, the schools goal is to limit the class size to 17-23 students.

Each student must complete an application to be placed in the admissions lottery. The application packet will consist of, but may not be limited to, the following items: a personal application form that gives name, address of domicile, e-mail address, parents name and address, birthday, present school, grade attending.

### Process for Admission:

Completion and submission of student application form by parent or legal guardian by due date which will be reviewed for completeness. Lottery cards will be assigned to each applicant. The lottery will be conducted by an Expedition School volunteer unaffiliated with the school or board. Applicants will receive confirmation of being in the lottery, the date, time and place. All lottery names will be placed in a large container and the volunteer(s) will draw cards from the container. Openings will be filled in each grade and class in the order drawn. A numbered waiting list for each grade level will be established to fill slots that become available at a later date during the academic year.

Children of current teachers and the director are exempt from the lottery, provided their number does not exceed the number of available seats in a

given grade. Children of the founding Board of Directors the first year only are exempt from the lottery, so long as (i) these children are limited to no more than ten percent (10%) of the school's total enrollment or to 20 students, whichever is less, and (ii) the charter school is not a former public or private school. If multiple birth siblings apply for admission to The Expedition School and a lottery is needed under G.S. 115C-238.29F(g)(6), The Expedition School shall enter one surname into the lottery to represent all of the multiple birth siblings. If that surname of the multiple birth siblings is selected, then all of the multiple birth siblings shall be admitted.

Process for withdrawals or transfers:

Students/families requesting transfer to another educational institution will be processed immediately upon written request to the School Director and records will be sent by the Office Manager to the transferring institution as soon as possible and/or within 48 hours.

Students who withdraw must go through the same enrollment procedures as any other applicant.

There are no pre-admission activities, but students who enroll will be asked to attend a summer "get to know you" session when students will be observed and assessed in order to place them in classes.

**PROJECTED ENROLLMENT 2014-15 through 2018-2019**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

- LEA #1 Orange County Schools
- LEA #2 Durham Public Schools
- LEA #3 Alamance-Burlington Schools

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 680	LEA 320	LEA 010	LEA 680	LEA 320	LEA 010	LEA 680	LEA 320	LEA 010	LEA 680	LEA 320	LEA 010	LEA 680	LEA 320	LEA 010
Kindergarten	31	4		31	4		31	4		31	4		31	4	
Grade 01	31	4		31	4		31	4		31	4		31	4	
Grade 02	31	4		31	4		31	4		31	4		31	4	
Grade 03	32	4		31	4		31	4		31	4		31	4	
Grade 04	32	4		32	4		31	4		31	4		31	4	
Grade 05	39	5		39	5		39	5		39	5		39	5	
Grade 06	59	7		39	5		39	5		39	5		39	5	
Grade 07	0	0		59	7		39	5		39	5		39	5	
Grade 08	0	0		0	0		59	7		39	5		39	5	
	255	32	12	293	37	13	331	42	14	311	40	13	311	40	13
	287			330			373			351			351		
	299			343			387			364			364		

**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.*

The Expedition School will ensure no child is denied access to the school due to lack of transportation. The school will set aside a portion of its annual budget yearly, to build capacity to purchase buses and pay drivers for bus transportation, or otherwise assist in transportation of students. While the savings accrues, the school will diligently work to organize carpools and ride-sharing among school families and teachers. If located in a walkable neighborhood, the school will organize "walking school buses" led by parents that collect children along the schools walking route and supervise their safe travel to and from school. The school is setting aside enough money each year so that while the school builds capacity to transport, any student who needs transportation as listed in their IEP will receive it.

Our transportation budget first 5 year plan:

Year 1: \$15,000

Year 2: \$28,000

Year 3: \$32,382

Year 4: \$30,495

Year 5: \$30,495

Depending on amounts spent each year, we hope to be ready to provide bussing sometime between year 3 and 5.

**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.*

Although we do not anticipate a large percentage of students that will need free and reduced lunch, we do plan to target our program to all SES groups in the Hillsborough area, and therefore we do expect to have some need to provide free/reduced lunch. We will not be participating in the Federal lunch program.

We have researched lunch programs run by other charters and found that many programs offer vendors from the area. A fee is charged per meal by the vendors, but the school can add to the price per meal. Other charters have added a small up charge to the meals in order to fund raise for the students that may not be able to pay. In addition, we will set up fundraisers with our PTA to help off set the free lunches that we may need to provide.

We have also set aside money on our budget to plan ahead for these costs. We have \$2,000 in our first year, \$3,000 in the second year and \$5,000 in year 3 and on set aside for food subsidy. We will be using a socio-economic survey to try to be sure we are not missing any child who may need food. We will work with our PTA to supplement the food money if the need arises.

As in many schools, we will ask for parent donated snacks for each class. This will help to ensure that all kids get a snack during the school day.

We also plan to stock a "pantry" of non-perishable items to supplement breakfast for children that are in need.

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

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

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

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$1,000,000		\$4,874.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$.00
Property Insurance	\$500,000		\$750.00
Motor Vehicle Liability	\$1,000,000		\$181.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other	\$8,219		\$8,219.00
Total Cost			\$14,356.00

\*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.

explorer 02/23/2013

\_\_\_\_\_  
 (Board Chair Signature) (Date)

**Facility:**

*Note that the SBE may approve a charter school prior to the school's obtaining a facility; however, students may not attend school and no funds will be allocated until the school has obtained a valid Certificate of Occupancy for Educational use to the Office of Charter Schools.*

*What is your plan to obtain a building? Identify the steps that the board will take to acquire a facility and obtain the Educational Certificate of Occupancy. If a facility has been identified please fill out the Facility Form (Appendix N).*

The Expedition School will continue to use the assistance of area realtors to search for a facility. Desiring to open the school with around 300 students and desiring to grow to 360+/- students, The Expedition School is searching for a large space of around 25,000 - 35,000 sf. The space will need to accommodate: 18 classrooms when at full capacity, 3 to 5 specialist rooms for art, music, technology, library, a large space for physical activity, a student presentation space, an office suite for administration, and Special Education teachers such as EC and ESL. The Expedition School board is also exploring the use of modular classrooms for the school.

The building will be handicap accessible. The building will be inspected for any health and safety hazards prior to signing a lease to assure the facility will be safe for children.

The Expedition School has had a year to locate a facility during 2012-13. Although no suitable facility was identified in time for a 2013 opening, we have learned a lot about real-estate in the area and feel confident that an option will become available for a 2014 opening. We have also dramatically adjusted our budget from our previous application in order to have a much higher rent line. This change will be of great help as we pursue properties for this charter.

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

If The Expedition School is not able to locate the best-fit space in Orange County, the schools contingency plan is to petition the board to allow the school to change the LEA to Durham. The school has already presented this charter to the superintendant of Durham, in order for him to have time to let the board know of any impact this may have on that county. However, the school's primary mission and vision is to serve students in Orange County. Therefore, efforts will be put into exhausting all options in Orange County prior to having to rely on this facility contingency plan.

## V. FINANCIAL PLAN

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

### **Budget: Revenue Projections from each LEA 2014-15**

<p><b>SHOW CALCULATIONS FOR FIGURING STATE AND LOCAL DOLLARS FOR THE PROPOSED CHARTER SCHOOL</b></p> <p><i>The formula for figuring these allotments can be found in the <a href="#">Resource Manual Finance Section</a>.</i></p>	<p>See <a href="#">Charter School Dollars per ADM</a> on the following link for per pupil allotments by county.  <a href="http://dpi.state.nc.us/fbs/allotments/support/">http://dpi.state.nc.us/fbs/allotments/support/</a></p> <ul style="list-style-type: none"> <li>All per pupil amounts are from the 2012-2013 year and would be approximations for 2014-2015.</li> <li>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.</li> <li>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.</li> </ul>			
	<p>LEA #1 680 - Orange County Schools</p>			
	<b>Revenue</b>	<b>2012-2013 Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for 2014-2015</b>
	State Funds	\$4,881.52	255	\$1,244,787.60
	Local Funds	\$3,205.20	255	\$817,326.00
	Federal EC Funds	\$3,239.16	31	\$100,413.96
	<b>Totals</b>			\$2,162,527.56
	<p>LEA #2 320 - Durham Public Schools</p>			
	<b>Revenue</b>	<b>2012-2013 Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for 2014-2015</b>
	State Funds	\$4,554.57	32	\$145,746.24
Local Funds	\$3,045.20	32	\$97,446.40	
Federal EC Funds	\$3,743.48	4	\$14,973.92	
<b>Totals</b>			\$258,166.56	
<p>LEA #3 010 - Alamance-Burlington Schools</p>				
<b>Revenue</b>	<b>2012-2013 Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for 2014-2015</b>	
State Funds	\$4,559.70	12	\$54,716.40	
Local Funds	\$1,495.90	12	\$17,950.80	
Federal EC Funds	\$3,743.48	1	\$3,743.48	
<b>Totals</b>			\$76,410.68	

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

<b>INCOME: REVENUE PROJECTIONS</b>	<b>2014-2015</b>	<b>2015-2016</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>
<b>-Exceptional Children Federal Funds</b>	\$119,131	\$132,806	\$149,001	\$139,283	\$139,283
<b>-Local Per Pupil Funds</b>	\$932,723	\$1,064,885	\$1,200,146	\$1,130,165	\$1,130,165
<b>-Other Funds*</b>	\$0	\$0	\$0	\$0	\$0
<b>-State ADM Funds</b>	\$1,445,250	\$1,674,361	\$1,889,148	\$1,776,873	\$1,776,873
<b>-Working Capital*</b>	\$0	\$0	\$0	\$0	\$0
<b>TOTAL INCOME</b>	\$2,497,105	\$2,872,052	\$3,238,295	\$3,046,321	\$3,046,321

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

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

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

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

BUDGET EXPENDITURE PROJECTIONS Personnel	2014-2015			2015-2016			2016-2017			2017-2018			2018-2019		
	# Staff	Salary per	Total salary	# Staff	Salary per	Total salary	# Staff	Salary per	Total salary	# Staff	Salary per	Total salary	# Staff	Salary per	Total salary
<b>Personnel:</b>															
Lead Administrator	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000
Core Content Teacher(s)	15	\$42,000	\$630,000	17	\$42,000	\$714,000	19	\$42,000	\$798,000	18	\$43,000	\$774,000	18	\$43,000	\$774,000
Para Educator(s)	1	\$20,000	\$20,000	3	\$20,000	\$60,000	3	\$20,000	\$60,000	3	\$20,000	\$60,000	3	\$20,000	\$60,000
Exceptional Children Teacher(s)	1.5	\$42,000	\$63,000	2	\$42,000	\$84,000	3	\$42,000	\$126,000	3	\$42,000	\$126,000	3	\$42,000	\$126,000
Related Service Teacher(s)	1	\$6,000	\$6,000	1	\$8,000	\$8,000	1	\$10,000	\$10,000	1	\$10,000	\$10,000	1	\$10,000	\$10,000
Contracted Personnel	2	\$30,000	\$60,000	2	\$33,000	\$66,000	2	\$35,000	\$70,000	2	\$35,000	\$70,000	2	\$35,000	\$70,000
Staff Supplements	1	\$10,000	\$10,000	1	\$15,000	\$15,000	1	\$15,000	\$15,000	1	\$15,000	\$15,000	1	\$15,000	\$15,000
Professional Development	1	\$10,000	\$10,000	1	\$18,000	\$18,000	1	\$18,000	\$18,000	1	\$12,000	\$12,000	1	\$12,000	\$12,000
Electives/Specialty Teacher(s)	2	\$42,000	\$84,000	3	\$42,000	\$126,000	4	\$42,000	\$168,000	4	\$43,000	\$172,000	4	\$43,000	\$172,000
Curriculum Director	1	\$65,000	\$65,000	1	\$65,000	\$65,000	1	\$65,000	\$65,000	1	\$65,000	\$65,000	1	\$65,000	\$65,000
Nurse	0	\$0	\$0	.5	\$42,000	\$21,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000
Guidance/Test Coordinator	0	\$0	\$0	1	\$41,800	\$41,800	1	\$41,800	\$41,800	1	\$41,800	\$41,800	1	\$41,800	\$41,800
Substitutes	1	\$10,500	\$10,500	1	\$14,250	\$14,250	1	\$15,750	\$15,750	1	\$15,750	\$15,750	1	\$15,750	\$15,750
Contracted Financial And Powerschool	1	\$50,830	\$50,830	1	\$58,310	\$58,310	1	\$65,790	\$65,790	1	\$61,880	\$61,880	1	\$61,880	\$61,880
Contracted Food	1	\$2,000	\$2,000	1	\$3,000	\$3,000	1	\$5,000	\$5,000	1	\$5,000	\$5,000	1	\$5,000	\$5,000
Office	1.5	\$35,000	\$52,500	2	\$35,000	\$70,000	2	\$35,000	\$70,000	2	\$35,000	\$70,000	2	\$35,000	\$70,000
Total Personnel	31	\$445,330	\$1,143,830	38.5	\$559,360	\$1,444,360	43	\$574,340	\$1,650,340	42	\$566,430	\$1,620,430	42	\$566,430	\$1,620,430
<b>Benefits:</b>	# Staff	Cost Per	Total												

The Expedition School

Health Insurance	22	\$5,200	\$114,400	30	\$5,200	\$156,000	35	\$5,200	\$182,000	34	\$5,200	\$176,800	34	\$5,200	\$176,800
Retirement Plan	1	\$154,733	\$154,733	1	\$195,395	\$195,395	1	\$224,255	\$224,255	1	\$217,690	\$217,690	1	\$217,690	\$217,690
Social Security And Medicare	1	\$83,301	\$83,301	1	\$105,191	\$105,191	1	\$120,728	\$120,728	1	\$117,194	\$117,194	1	\$117,194	\$117,194
Total Benefits	46	\$243,697	\$362,620	62	\$306,249	\$470,476	72	\$350,646	\$543,188	70	\$340,547	\$527,426	70	\$340,547	\$527,426
Unemployment	22	\$463	\$10,186	30	\$463	\$13,890	35	\$463	\$16,205	34	\$463	\$15,742	34	\$463	\$15,742
<b>Total Personnel Budget</b>	77	\$689,027	\$1,506,450	100. 5	\$865,609	\$1,914,836	115	\$924,986	\$2,193,528	112	\$906,977	\$2,147,856	112	\$906,977	\$2,147,856

**\*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**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>2014-2015</b>	<b>2015-2016</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>
Books and Supplies	Copy Paper	\$15,000	\$15,000	\$18,000	\$18,000	\$18,000
	Curriculum/Texts	\$44,850	\$51,450	\$58,050	\$9,100	\$9,100
	Instructional Materials	\$73,900	\$54,300	\$46,700	\$36,400	\$36,400
	Other	\$1,000	\$1,500	\$1,500	\$1,500	\$1,500
	School Supplies	\$10,000	\$12,300	\$12,800	\$12,800	\$12,800
Human Resources Costs	Human Resources Other	\$2,000	\$500	\$500	\$500	\$500
	Legal Counsel	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
Other	Audit	\$0	\$9,000	\$10,000	\$10,000	\$10,000
	Bank Fees	\$200	\$500	\$500	\$500	\$500
	Insurances	\$14,356	\$14,356	\$23,812	\$23,812	\$23,812
	Marketing Plan	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
	Transportation Plan	\$15,000	\$28,720	\$32,382	\$30,495	\$30,495
	Travel Expenses	\$500	\$500	\$500	\$500	\$500
Rents and Debt Services	Custodial Supplies	\$4,000	\$5,000	\$6,000	\$6,000	\$6,000
	Facility Lease/Mortgage	\$500,000	\$500,000	\$530,000	\$530,000	\$530,000
	Maintenance	\$29,000	\$29,000	\$35,000	\$35,000	\$35,000
	Security/Alarm	\$2,500	\$600	\$600	\$600	\$600
Technology Technology Hardware	Instructional Software	\$10,737	\$11,287	\$11,832	\$11,550	\$11,550
	Network/Internet	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800
	Office Software	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Other	\$77,500	\$56,340	\$48,520	\$45,200	\$45,200
Utilities	Electric	\$20,000	\$30,000	\$36,000	\$36,000	\$36,000
	Phone	\$5,000	\$7,500	\$7,500	\$7,500	\$7,500
	Water/Sewer/Trash	\$6,000	\$8,000	\$8,000	\$8,000	\$8,000
<b>Total Operations</b>		<b>\$844,343</b>	<b>\$848,653</b>	<b>\$900,996</b>	<b>\$836,257</b>	<b>\$836,257</b>

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

**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>2014-2015</b>	<b>2014-2015</b>	<b>2015-2016</b>	<b>2016-2017</b>	<b>2017-2018</b>
TOTAL EXPENDITURES (PERSONNEL)	\$1,506,450	\$1,914,836	\$2,193,528	\$2,147,856	\$2,147,856
TOTAL EXPENDITURE (OPERATIONS)	\$844,343	\$848,653	\$900,996	\$836,257	\$836,257
TOTAL EXPENDITURES	\$2,350,793	\$2,763,489	\$3,094,524	\$2,984,113	\$2,984,113
TOTAL REVENUE	\$2,497,105	\$2,872,052	\$3,238,295	\$3,046,321	\$3,046,321
ANNUAL NET PROJECTIONS	\$146,312	\$108,563	\$143,771	\$62,208	\$62,208

**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 Expedition School will open with the K-6th grade classes at full capacity. As the progression of students causes the 7-8 classes grow, teachers will be added in years two and three to accommodate that growth. The school will reach full capacity in year three (2016-17). Our enrollment plan includes having the equivalent of two classes per grade, and three grade 6 classes. We plan to take this class to it's eighth grade year (not re-enrolling this 3rd class of grade 6) and not renew this third class of students, leaving each class with two classes of students. This plan is in place to accommodate any 6th grade students transitioning out of Orange County's year-round elementary who would like to remain in a year-round program; (we'd have the only year-round middle school option), and allow our school to build a strong contingency budget in year 1. However, if there are not enough students to enroll this third class, our school's financial plan will still remain strongly in the positive. From the third year on, we plan to have our "own" students fill in spots in all grades, and enroll for only new Kindergardeners and any spots that come available. The school can operate at 276 students in year 1.

If the enrollment is lower than projections, the school will not hire additional staff beyond what is required to serve the current population.

The break even point for student enrollment is

- Year 1: 276
- Year 2: 320
- Year 3: 364
- Year 4: 363
- Year 5: 364

- 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 school will contract with a financial management company, to manage the back office requirements of the school. The audits will be done by a separate company as listed in this charter in the audit section. Cost and reliability and high-quality references and ability to do the job well will be criteria for selecting the contracted services.

- 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.*

Yearly, we have budgeted for curriculum needs to meet our project-based, STEM mission.

We have budgeted for incentive pay for teachers to pay teachers extra for National Board Certification or for extra leadership duties such as primary "lead teacher" etc. This incentive money will help us meet our goal of attracting and retaining the best teachers.

We add an additional .5 EC teacher in year two and in year three we will add an additional EC teacher, as the population requires. We will contract out for Speech and OT services and have budgeted for this each year and accounted for some growth in need for these services as the school grows.

In year 1, the school will operate with a PE specialist, and a music/band specialist. In year two the budget allows for the addition of a Spanish instructor. In year 3 and on, we have the capacity to add an art specialist teacher. We plan to contract out technology services for the first several years. Specialists classes will allow our teachers ample planning time, plus will enrich and balance our student's learning.

The Expedition School has budgeted with staff development as a priority every year. The position of the "Director of Curriculum and Professional Development" is dedicated to providing professional development to teachers. This person will be the in-house trainer that assists teachers in developing STEM focused and integrated project-based lessons. In addition, supplemental professional development funds are set aside for specific training needs to meet the school's mission.

Technology is an important part of The Expedition School and plays a key role in STEM. \$30,000 per year is budgeted in years two through five to continue to purchase computers, ipads, projectors, document cameras, and to begin to outfit the school with Smartboards. Instructional software is budgeted at increasing levels to purchase software such as imovie, Brainpop, Dreambox Learning and Voicethread. These are quality programs that will enhance our project based, strength focused, STEM curriculum. Internet services are funded each year.

We plan to save part of the budget yearly to purchase buses to transport students. The savings for transportation increases due to the increase of the student population. Transportation funds will be spent to bring any EC student with transportation needs in their IEP to school as a first priority, and then expand to other students.

We included in the budget money to begin to cover lunches for students who are in need. This lunch subsidy increases each year to reflect the increase in the population. We plan to work with our PTA to enhance this subsidy.

Each year, as a contingency, we plan to save:

Year 1: \$50,000 of \$146,312 left

Year 2: \$50,000 of \$108,563

Year 3: \$50,000 of \$143,771

Year 4: \$25,000 of \$62,208 Brought lower due to increased staff

Year 5: \$25,000 of \$62,208

- 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 school's core operations are currently dependent only on federal and local funding sources. The school plans to begin fund-raising as soon as this charter is granted. The school plans to aggressively pursue grants and is going to start a foundation to collect donations.

- 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?*

The school plans to hire pending student enrollment. We plan to have hired for student's basic needs, such as classroom teachers, EC teachers and specialist teachers. The hiring of part-time, office and par-educators will occur as enrollment dictates. We can also use volunteers to help in some areas such as custodial and technology if we find ourselves in need.

Break Even Enrollment eliminates one class, or 23 students, from originally projected enrollment:

Year 1: 276 students

Year 2: 320

Year 3: 364

Year 4: 364

Year 5: 364

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

We plan to fund-raise immediately following the receipt of our charter to gather some start-up funding.

If needed, we may use a company like "Charter School Capital" who lends money to charters to help meet cash-flow needs.

**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 Expedition School will use an independent auditor to conduct the audit. *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 Expedition School will use an independent auditor to conduct the audit. We will use either of the following auditors:

Batchelor, Tillery and Roberts, LLP, CPA  
Jim Black  
3605 Glenwood Ave, Suite 350  
Raleigh, NC 27612  
919-781-0217  
Fax: (919) 783-6724

OR

Petway, Mills & Pearson  
Phyllis Pearson  
5116 Burr Oak Circle  
Raleigh, NC 27612  
919-269-7405  
Fax: 919-781-1052

