



NORTH CAROLINA CHARTER SCHOOL APPLICATION

Heritage Learning Academy

Public charter schools opening the fall of 2015

Due by 5:00 pm, December 6, 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 2015-2016 school year

APPLICATION DUE DATE/TIME

- September 6, 2013** A letter of intent to apply for the 2015-2016 school year **must** be received electronically to Deanna Townsend-Smith in the Office of Charter Schools **no later than 12:00 noon at deanna.townsend-smith@dpi.nc.gov**. 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.
- December 6, 2013** A complete online application package, in the Office of Charter Schools **by 5:00 pm.**
- December 13, 2013** A copy of the application due to the Local Education Agency in which the proposed charter school will reside in. Applicant must provide an attached PDF version as evidence to the Office of Charter Schools (i.e. signed letter).

APPLICATION SPECIFICATIONS

Applicants can submit applications prior to the deadline December 6, 2013 at 5:00 pm. **All applicants must be submitted using the online portal** and applicants are to use the following specifications:

1. All required Appendices should be clearly titled, include page numbers (i.e. Appendix A and page numbers as- A1, A2, B1...), and submitted as a FULL PDF document.
2. Review all elements of your application for completeness before submitting. **An incomplete application will result in the elimination of the application.**
3. Late submissions **will not** be accepted. No exceptions.
4. Provide confirmation electronically to the Office of Charter Schools to deanna.townsend-smith@dpi.nc.gov that within seven (7) days the applicant has provided one full copy of the application to the LEA in which the proposed charter school will be located.

TABLE OF CONTENTS

I.	<u>APPLICATION CONTACT INFORMATION</u>	5
	<u>Grade Levels Served and Total Student Enrollment:</u>	5
II.	<u>MISSION and PURPOSES</u>	7
	<u>Mission:</u>	7
	<u>Educational need and Targeted Student Population of the Proposed Charter School:</u>	7
	<u>Purposes of the Proposed Charter School:</u>	9
	<u>Goals for the Proposed Charter School:</u>	10
III.	<u>EDUCATION PLAN</u>	13
	<u>Instructional Program:</u>	13
	<u>C</u>	
	<u>K-5 Curriculum and Instructional Design:</u>	14
	<u>C</u>	
	<u>6-8 Curriculum and Instructional Design:</u>	16
	<u>C</u>	
	<u>9-12 Curriculum and Instructional Design:</u>	18
	<u>Special Programs and "At-Risk" Students</u>	20
	<u>Exceptional Children</u>	22
	<u>Student Performance Standards</u>	24
	<u>Student Conduct:</u>	25
IV.	<u>GOVERNANCE, OPERATIONS and CAPACITY</u>	27
	<u>Governance:</u>	27
	<u>Governance and Organizational Structure of Private Non-Profit Organization:</u>	27
	<u>Proposed Management Organization (Educational Management Organization or Charter Management Organization)</u>	31
	<u>Private School Conversions: complete</u>	31
	<u>C</u>	
	<u>Projected Staff:</u>	32
	<u>Staffing Plans, Hiring, and Management</u>	32
	<u>Staff Evaluation and Professional Development</u>	34
	<u>Enrollment and Marketing:</u>	35
	<u>Marketing Plan</u>	36
	<u>Parent and Community Involvement</u>	36
	<u>Admissions Policy</u>	37
	<u>PROJECTED ENROLLMENT 2015-16 through 2019-2020</u>	39
	<u>Transportation Plan:</u>	40
	<u>School Lunch Plan:</u>	40
	<u>Civil Liability and Insurance</u>	40
	<u>Health and Safety Requirements:</u>	41
	<u>Facility:</u>	
	<u>Facility Contingency Plan:</u>	41
V.	<u>FINANCIAL PLAN</u>	
	<u>Budget: Revenue Projections from each LEA 2015-16</u>	43
	<u>Total Budget: Revenue Projections 2015-16 through 2019-2020</u>	44
	<u>Personnel Budget: Expenditure Projections 2015-16 through 2019-2020</u>	45
	<u>Operations Budget: Expenditure Projections 2015-16 through 2019-2020</u>	48
	<u>Overall Budget:</u>	50
	<u>Budget Narrative:</u>	50
	<u>Financial Audits:</u>	53
VI.		

AGREEMENT PAGE

LEA Impact Statement: 54

Applicant Signature: 54

I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Heritage Learning Academy

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

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

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

Name of contact person: *Yolonda Mason*

Title/Relationship to nonprofit: *Founder/Chairperson*

Mailing address: P O Box 680402
Charlotte NC 28216

Primary telephone: 704-779-0958 Alternative telephone: 704-391-9887

E-Mail address: *heritagelearningacd@gmail.com*

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

County: MECKLENBURG

LEA: 600-Charlotte-Mecklenburg Schools

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

No: X

Yes:

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

No: X

Yes:

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

Is this application for Virtual charter school: Yes: No: X

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2015 Month August

Will this school operate on a year round schedule?

No: X

Yes:

Proposed Grade Levels Served and Total Student Enrollment (

10

Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
First Year	K,01,02,03,04,05	154
Second Year	K,01,02,03,04,05,06	176
Third Year	K,01,02,03,04,05,06,07	198
Fourth Year	K,01,02,03,04,05,06,07,08	396
Fifth Year	K,01,02,03,04,05,06,07,08,09	440
Sixth Year	K,01,02,03,04,05,06,07,08,09,10	484
Seventh Year	K,01,02,03,04,05,06,07,08,09,10,11	528
Eight Year	K,01,02,03,04,05,06,07,08,09,10,11,12	572
Ninth Year	K,01,02,03,04,05,06,07,08,09,10,11,12	572
Tenth Year	K,01,02,03,04,05,06,07,08,09,10,11,12	572

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 initial 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 will result in disqualification from the application process or revocation after award. I understand that incomplete applications will 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 non-profit organization.

heritagelearning
Signature

Founder/Chairperson
Title

heritagelearning
Printed Name

12/06/2013
Date

II. MISSION and PURPOSES

(No more than three total pages in this section)

Mission:

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

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

Heritage Learning Academy utilizes a rigorous and challenging Charlotte Mason Model of Education to develop students of strong character and purpose.

Core Values

- * To ignite a passion for knowledge
- * To cultivate a love for life-long learning
- * To provide a supportive environment for parents and students
- * To contribute wholeheartedly to service in the community

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.*

In the West Charlotte area, there are several overcrowded schools which serve students who could use a more personalized educational plan and who would benefit from smaller classes and individualized attention. Currently, there are no charter schools in the southwest Charlotte area. CMS (Charlotte Mecklenburg Schools) has a 2013 bond referendum recently passed asking for a new PK-8 school to help relieve overcrowding at Berryhill and Reid Park. Berryhill is near capacity and Reid Park is over capacity. Immediate relief of overcrowding in these schools is needed. Heritage Learning Academy will provide a much-needed option for parents in this area.

While it is assumed that our demographics will be the same as the local schools in the area, our philosophy may well draw families from across Mecklenburg County as well as those living in Gaston County.

HLA's mission is to educate children using the very distinctive Charlotte Mason Model, which has some parallels to The Basic School model currently in use by several other charter schools in the North Mecklenburg area. (See Appendix T) Those model schools have extensive waiting lists which rightfully indicates not only that more school choices are needed for parents in Mecklenburg County but that a comparable model like HLA would be well received by local parents.

2. *What will be the total projected enrollment at the charter school and what percentage of the*

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

HLA's projected student enrollment in year 1 is 154 students in grades K-5 and adding a grade per year. However in year 4, enrollment will increase to two class grades per year. The total projected student enrollment for K-12 is 572 by Year 9 which is .38% of the Mecklenburg ADM and .21% of Gaston ADM.

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

Heritage Learning Academy's educational plan is based on Charlotte Mason's philosophy of education (See Appendix T). One of the main differences in this unique method of teaching is developing the habit of narration in each student. Narration is the art of retelling or telling back the information that was just heard. Through this process of narration students are developing a love for learning which allows space for greater creativity, expanded application of critical thinking skills, and a strong connection to the environment, the natural world, scientific analysis, and reading comprehension.

Heritage Learning Academy's mission is to have a supportive nurturing environment in each classroom. Where the neighborhood school might be forced to accept the limitations of a larger class size and overcrowded facilities, HLA plans to limit class size to 22 students with one full-time teacher and one full-time assistant teacher. Also, in grades K-2 one part-time floating assistant will be available per grade. This will allow for ample individual instruction with opportunities for narration, small group learning and daily assessments.

One of Charlotte Mason's tenets of education is relational education. Relational education respects each student as an individual with varied natural affinities, gifts, and abilities. Our goal at HLA is to utilize Charlotte Mason's methodology, which views the child as a born person, endowed with the ability to think, analyze, and wrestle with ideas. We will present them with living, engaging educational materials that will ignite within them a desire to grow in skills, ability to analyze, and will expose them to primary source documents and the words of heroes and great men and women of the past who have impacted the world for good. Well-written, enlivened texts that draw in students will replace lecture format and textbooks, and the teacher's job will be to spread a feast of living ideas before each student in order to allow for a greater level of connection with the material, the skill-set, or the ideas presented.

Habit training will be encouraged and developed daily for each student. Charlotte Mason wrote "Sow a habit, reap a character." As teachers interact with students daily and develop a routine, rigorous schedule with habits of attention, narration, and focus cultivating character in each student.

4. In the appendices (Appendix A), you must provide evidence through a narrative or visual of this educational need through survey data, or times and locations of public meetings discussing this proposed charter school. (Please do not provide more than one sample survey form).

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

The Six Legislative Purposes of a Charter School are:

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

3. Expanded Choices

HLA will offer parents and students a unique type of educational opportunity. The Charlotte Mason Model of Education is widely used in private schools and homeschools. However, the Mason Model of Education in public schools is expanding. In 2010 Gillingham Charter in Pottsville, PA became the first charter school implementing the Mason Model of education. HLA has and will work closely with the staff there to glean ideas on how to effectively teach the Mason Model of education and stay aligned with HLA's mission.

Parents here in Charlotte and the surrounding areas are definitely looking for expanded choices. Popular area schools like Community School of Davidson and Corvian that use The Basic School Model by Ernest Boyer have long waiting lists which demonstrates the high demand for school choices. HLA will be able to meet that need. Some of the basic similarities in the two models are the Science of Relations which The Basic School calls the Building of Community. The Mason Model focuses on habit training which The Basic School calls the Commitment to Character. These commonalities will help in educating parents about the Mason Model while providing a much needed school choice. (See Appendix T)

6. Innovative Teaching Methods

The Charlotte Mason Model of education is very different and innovative. The most prominent facet of a Charlotte Mason styled education is Narration. Narration is the retelling of information, best done immediately after the reading is completed. In her words: "...he will find that in the act of narrating every power of his mind comes into play, that points and bearings which he had not observed are brought out; that the whole is visualized and brought into relief in an extraordinary way; ... he knows; he has assimilated what he has read." (Charlotte Mason, A Philosophy of Education). This attention to detail is developed early within each student so that

learning comes more easily and freely. The children find the act of narrating so pleasant in and of itself that little urging is required on the part of the teacher.(See Appendix T)

One of the core values of HLA is to ignite a passion for knowledge. Charlotte Mason wrote, " There are four means of destroying the desire for knowledge:

a)Too Many Oral Lessons which offer knowledge in a diluted form, and do not leave the child free to deal with it.

b)Lectures, for which the teacher collects, arranges and illustrates matter from various sources; these offer knowledge in a too condensed and ready prepared form.

c)The Text Book, compressed and re-compressed from the big book of the big man.

d)The Use of Emulation and Ambition as the sole incentives to learning in place of adequate desire for, and delight in, knowledge."(PNEU Manifesto) Using the Mason Model will include classic literature and other well written living books. Each subject will be taught from well written source documents to keep students engaged.

One strong component of Mason's innovative methodology is the idea that students must eagerly seek out knowledge rather than have it handed to them. As Abigail Adams said: "Learning is not attained by chance; it must be sought for with ardor and attended to with diligence." Charlotte Mason's main belief that "education is not the filling of a bucket but the igniting of a fire" (Yeats)informed every facet of her method, including this insistence on the student attaining understanding rather than the teacher "filling" the student with facts.

Our President in his Five Pillars of Education speech is promoting innovation and excellence in charter schools. President Obama stated, "One of the places where much of that innovation occurs is in our most effective charter schools. And these are public schools founded by parents, teachers, and civic or community organizations with broad leeway to innovate -" The Charlotte Mason Model of Education would unquestionably provide innovation in the public schools.

Goals for the Proposed Charter School:

- 1. 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. Address how often and when the information will be communicated to the governing board and other stakeholders. These goals should include specific and measurable performance objectives over the first five years of the schools existence.*

Goal #1 Each student will show substantial increase in knowledge, understanding, ability to learn, attentiveness, and service.

Objectives:

1. Teacher Evaluations:

Teachers will assess children on an ongoing basis through the use of student notebooks, where the teacher will record observations of the student's progress, attentiveness, academic speed, learning style, social

interactions, personality, narration performance and attitude. Teachers will use the method of oral exams to assess the student's true knowledge of each covered subject area.

2. Self Evaluations:

Each student will create notebooks for many of their subjects which will aid them in cataloging many of the ideas they have encountered throughout the year. Possible notebooks could include: drawings, written narration, lists of misspelled words, copy work, leaf collection, historical timeline and much more.

3. READY End of Grade Assessments

HLA will administer READY End of Grade Assessments each spring as another way to measure each student's academic growth.

Goal #2 In the first three years of enrollment at HLA, 85% of students will demonstrate improvement in habit training skills which increases overall character development.

Objectives:

1. In the beginning of the school year, teachers will meet with parents to discuss an individual target habit training skills plan for each student. Using a scale of 1 to 5 teachers will measure at least three and no more than ten specific habits for each student. (See Appendix T List of Habits)

2. Using a daily checklist teachers will log students progress in specific habit area.

3. At the end of each term data will be collected. At the end of three years, the term data will be analyzed to determine growth in habits.

Goal #3 At least 50% of parents will become actively involved in student activities and volunteer opportunities within the school.

Objectives

1. Parents will be encouraged to attend the monthly collaboration meetings. Involved parents will make the school and students more successful.

2. Parents will volunteer at the school and commit to a schedule of volunteer activities and times throughout the school year.

3. A parental participation list will be kept. At the end of each term and at the end of each year, the percentage of parents (and grandparents) who volunteered will be calculated.

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

HLA will measure student progress through test scores and other data, including the NC READY assessments. The Charlotte Mason philosophy of teaching has proven in other schools and settings to greatly improve basic academic performance. Gillingham Charter School has been operating for three years as a Charlotte Mason charter school with amazing results. (See Appendix T-10) Traditional assessment standards will reflect this within the first 5 years.

The HLA board will have the teachers complete the North Carolina Teacher's Working Conditions surveys and will use this information to continually pursue excellence in the teaching environment. At the end of each term, students will be assessed on the work through a week's examination. The board of directors and the administration will use a variety of tools to assess the engagement of our students and other levels of growth aside from academics. Student growth will be seen in their participation in plays, artwork, nature journaling, sports, handiwork, creative writing, etc. Student attendance will also reflect the student's engagement and excitement for daily learning. The HLA's goal is to maintain a high rate of student attendance.

Each year a family survey will be given to assess parental satisfaction with every aspect of the school. Parental participation in the monthly meetings will assist the governing board in maintaining a supportive environment. The HLA board will design a school improvement plan based on feedback from all of the above.

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 will 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.

HLA's major instructional method is focused on the fact that each child is a person and should be treated as one. As an individual each student has the ability to learn and connect to ideas through meaningful relationships, developing habits and feasting on ideas from living books. This concept is the foundation of what "Education is the science of relations," means for each student.

The instructional methods of a Charlotte Mason philosophy rely heavily on the motto "Education is a discipline, a life and an atmosphere." Language, especially oral language is the cornerstone of all learning. Narration is a learning and processing tool that capitalizes on oral language especially in the early years. Narration over time develops a child's oral vocabulary which is a precursor to a reading and written vocabulary.

Discipline is the key to habit training for our children to have healthy living and well developed learning habits. The mind is disciplined through attention and focus. This skill will be enhanced daily as each child will have the opportunity to narrate (telling back) living books read by the student or read aloud by the teacher. Living books are used because children naturally engage with living books in the literary form (story). Without engagement there is no attending and without attending there is no learning. The distinctive here is that the natural laws of learning are put into force by 1) living books which 2) engage children, 3) which works with the children naturally to help the children attend. Narration requires sequencing, comprehension, synthesising, inferencing, judging and creativity. Narration involves a child in learning at the higher levels of Bloom's taxonomy. This narration can be done orally, visually or dramatically. Children learn better and faster when the skill of focus and attention are encouraged. This instructional method is sometimes considered rigorous and arduous but once the skill has been mastered, less time is wasted in the class room on repeated reading. However, more time is now available for more knowledge.

Narration also, then is the precursor to good writing. Children narrate living books which are books written by the best authors. Embedded in this process of narrating is good vocabulary, good spelling, and good sentence structure. All of these which are developed through narration then become the tools for good writing. Narration establishes the habit and pattern of good writing.

Another distinctive is the large curriculum which enables children to have a

larger view of the possibilities for living and choosing a life career. Limiting children to a core curriculum limits their ability to make career choices.

Also a distinctive is that all instruction is objective in nature. Charlotte Mason methods encouraged the use of personal observation for children to learn. Developing the habit of "seeing" what is really there and observing the details and learning about the details is part of a constructivist approach to learning.

Nature is prominent in the paradigm of learning. Children are to be in nature daily. Through the study of nature and science children can relate to the wonder and beauty of the outdoors. Outside time will be implemented daily and often.

Developing habits for living a full life is another distinctive. Habits are the rails upon which good character is established. The model of education is as much about learning content as it is about learning to develop good character.

This education plan requires: 1) a broad curriculum to ignite the interest of all students 2) Living books that encourage natural engagement, 3) Narration as a methodology that requires processing of new learning, 4) a sequential historical curriculum that allows for natural relationships to develop between child and the people of history, art, music, etc. 5) this educational plan is designed such that children must construct their own knowledge - there is no education except self education.

K-5 Curriculum and Instructional Design:

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

HLA's class day will be full with short class periods and small class sizes. The actual class instruction time will be short and intentional to develop habits of focus and attention. A broad liberal curricula will be provided daily. The subjects covered are: Mathematics, Foreign Language, History, Music, Composer Study, Drawing and Painting, Picture Study, Handwriting, Literature, Physical Education, Handiwork, Citizenship, Geography, Poetry, Nature Study and Science.

The above subjects will be taught in a small class setting to allow for each student to reflect and express knowledge obtained. Each class room will have a maximum of 22 students with one teacher and one assistant. In grades K-2 where students are learning the concept of "Education is a discipline" a part-time floating teacher per grade will be provided to allow for more individual instruction. Developing strong teacher and student relationships are key during this time so at HLA teachers will loop with students for three years. This allows for a stable environment and stable relationships for all involved - parents, teachers and students. The practice of looping is used and encouraged in The Basic School by Ernest Boyer which is a very popular model here in Mecklenburg County. This concept of community and developing relationships is aligned with the Charlotte Mason Model of education. (See Appendix T1).

The classroom setting will be tables and working space instead of individual desks. This will give each student room for mobility and opportunities to work in groups and independently. There will be reading centers for children to engage in independent reading time with books on each students level. There will be art study so paintings from various artists will be studied and children will then create their own masterpieces from the ideas presented. Composers will be studied for their style and technique in music. Children will have the chance to express their understanding of the composer and his music.

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 the elementary division 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.*

This structural model meets the needs of the targeted population by offering training in study habits, close attention to detail, and the ability to narrate. The example provides sample living books, a list of knowledge and skills the child should know when he or she finishes with the course. These key strategies are essential for all students and have been lacking in the traditional school environment, largely because of class size and the strict adherence to state-established curriculum. HLA will use its own curriculum, strategies, and techniques to achieve stronger results for a county-wide student population consisting of students currently learning at, above, or below grade level.

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.*

Narration will be used for the students. Narration is retelling a story or expression of what is learned. Teachers will need to know how to introduce new learning through narration: build background knowledge, introduce new vocabulary, build context, choose the correct method of reading the content, have children narrate using a variety of means (oral, written, dramatic, graphic organizer, outline, lists, drawing and others). Teachers will need to understand what narration is and allow the students to express themselves uninterrupted.

4. *Provide a school academic calendar in Appendix C (minimum of 185 instructional days or 1,025 hours).*
5. *Describe in a brief narrative below on how the calendar coincides with the tenets of the proposed mission and education plan.*

HLA will provide 185 instructional days and 16 teacher development and training days. The success of HLA's mission and education plan will be trained teachers understanding how to facilitate in the classroom. At the beginning of the year, two weeks of training and planning has been provided

to ensure teachers understand the curriculum.

6-8 Curriculum and Instructional Design:

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

Charlotte Mason's methods don't change from elementary to middle school. Dictation is added. However, at this point increasing complexity of literature based materials with more in depth foreign language and study. Forms of documentation of what children have learned can be included in the following: Citizenship and recitation, Book of Century, nature journals, common places book, notebooking and collections are added during grades 6-8.

Classroom size will stay the same.

Instructional Methods:

The Charlotte Mason Method offers a paradigm shift from traditional educational techniques to child-focused, individualized learning through observation, exploration and discovery. Our emphasis is on the child as learner with this model. The teacher provides materials that will allow for active learning to take place and offers redirection or stimulates curiosity as needed. Engaged learning is triggered by targeting three specific areas: Habit Training, Narration, and the use of Living Books.

Habit Training Students at HLA will be taught the school motto: "I am, I can, I ought, I will." Each child will learn that he is important to society, that he can make a difference in the world, and most importantly that he OUGHT to do so and WILL. The way of the will is a phrase students will hear often. In the early elementary years, students are taught to use their "will" to apply themselves and to pursue excellence in their studies. Once basic skills are achieved, our emphasis is on the formation of three perfect letters, for example, rather than the filling in of dozens of worksheets with careless effort. Perfect execution is stressed quality over quantity. When the student knows that every detail is important, he will respond with perfect execution. It all begins with training in good habits.

Narration Narration is the art of knowing. A Charlotte Mason school emphasizes oral recitation and the retelling of important concepts as a method of assessment. No subject is left out of the narration process. After every lesson, the students are asked to tell back what they just learned, either orally or on paper. They learn the habit of attention this way and are constantly being thoroughly evaluated without the "test" label being placed on the narration process. Children enjoy telling teachers what they've just learned and often take great joy in the process and narrate with zest and vigor. There are many ways to narrate orally, on paper, by acting out what they learned themselves or with puppets, by drawing pictures. These are all strong assessment tools that are constantly in use throughout the days, weeks, months, and year. A portfolio is kept for each student. Evaluation by portfolio is a key tool in the success of a Charlotte Mason school. Areas of weakness are discerned and addressed early. Individualized attention is offered to students displaying weaknesses in certain areas.

Living Books Living books differ from textbooks in key ways: structure, style, ability to engage imagination, and a keen sense for reflecting culture and a deeper understanding of human nature throughout time. A living book draws students in through story. HLA will utilize primary documents such as journal entries written by historical figures, scientists, inventors, artists, composers, mathematicians, etc. whenever possible. Historical fiction will be assigned in addition to a history text that teaches via story. The use of engaging literary source material rather than textbooks is one way to enliven the curriculum and engage the student in the learning process.

Provide a synopsis of the planned curriculum, including:

1. **One** sample course scope and sequence (preferably in graph form) in the Appendices (Appendix B1) for one core subject (specific to the school's purpose) for the middle school division 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.

This structural model meets the needs of the targeted population by offering training in study habits, close attention to detail, and the ability to narrate. These key strategies are essential for all students and have been lacking in the traditional school environment, largely because of class size and the strict adherence to state-established curriculum. HLA will use its own curriculum, strategies, and techniques to achieve stronger results for a county-wide student population consisting of students currently learning at, above, or below grade level.

Difference in middle school:

Longer class periods than in elementary - 30 minutes

Students need the Authority

Good humor

Confidence

Sound mind and sound body

Teach that our time is not our own - "It is a bad thing to think that time is our own to do what we like with. We are all employed; we all have duties, and a certain share of our time must be given to those duties."

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.

In the middle school, instructional strategies build up narration, dictation and further living books education. Having a wider broad base knowledge across various subjects, students will develop in the art of knowing which is narration. The cognitive skills and ability to formulate, organize and express significant ideas will demonstrate increased academic achievement in every student.

Students will formulate the ability to reason. Through expression (oral, written or verbal), student will begin to connect background knowledge and experiences to real world application. This confirms and reiterates how essential oral literacy is in the early years to develop effective

communication skills.

4. *Provide a school academic calendar in Appendix C (minimum of 185 instructional days or 1,025 hours).*
5. *Describe in a brief narrative below on how the calendar coincides with the tenets of the proposed mission and education plan.*

HLA will provide 185 instructional days and 16 teacher development and training days. The success of HLA's mission and education plan will be trained teachers understanding how to facilitate in the classroom. At the beginning of the year, two weeks of training and planning has been provided to ensure teachers understand the curriculum.

9-12 Curriculum and Instructional Design:

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

The Charlotte Mason Method offers a paradigm shift from traditional educational techniques to student-focused, individualized learning. During the high school years, the student takes an even more active role in his studies. With a strong habit of attention, diligence, perfect execution, effective study habits and a strong curriculum of living ideas from primary source material, each student enters an independent learning phase of study. Experiments replaces exploration; primary sources and research texts replace story books and fictionalized accounts. Classic literature of high caliber is now an integral part of the design, as is an intense focus on higher math skills and scientific inquiry. In essence, the high school years more closely resemble a university type education.

The use of engaging literary source material rather than textbooks will still be the norm and continues to enliven the curriculum and engage students in the learning process. Written expression takes on a significant role, and teachers become mentors for this rigorous curriculum as each student prepares for college.

The learning environment will continue to include classroom-based study and time outdoors, although there will be less time for nature study and exploration than in the previous years. Rigorous research in the sciences will replace much of this time. Class size will remain steady at no more than 22 students per class, while one on one portfolio review time with the instructor will be provided for each student every two weeks throughout each term or as needed.

Rubrics will be provided to students for grading purposes, so that each student will know what work of high quality looks like and high expectations will be the norm throughout high school.

Narration will still be used to reinforce materials, test for knowledge and create good public speaking habits. Much narration will still be used as well, including long poems, speeches, and dramatic dialogue. All of the arts: music, visual, and drama will be utilized, and all students will have to participate in some type of arts curricula or activity. Shakespeare, Dickens, Bach, Raphael, and many others will be close friends to our students.

Provide a synopsis of the planned curriculum, including:

1. *One sample course scope and sequence for one core subject (specific to the school's purpose) (Appendix B2).*
2. *As Appendix B3, provide a visual disseminating what courses (core content and electives) will be offered in year one through year five of the charter high school. Please ensure the projected staff and budget aligns with the course offerings.*
3. *Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model.*

Through a broad curriculum of well written living books students will continue the vast knowledge and abilities that they continued in the elementary and middle years. The child has learned to seek truth, work toward excellence, develop habits of the will, and has developed a deep desire to learn. As HLA wants to produce students who are extremely college or career ready we will provide a selection of courses which will both challenge and inspire our students, as well as, prepare them for all future endeavors.

Common Core alignment will be implemented, as all of our students are taught to think and understand each area of study. Students continue to develop skills of narration but with a more intense focus on written expression. As additional ideas are presented and learned students will gain more knowledge and understanding while making connections across the subjects. Parroting back of facts is not a part of Charlotte Mason Methods so understanding is paramount.

HLA will provide all the classes needed for a student to be accepted to any and all colleges as well as varied classes which will prepare students for the work force. Communication skills of all types will be a daily focus. Our students will know what they want to pursue and be given the opportunities to pursue that knowledge with a guide who can direct their studies, as well and inspire and challenge them.

4. *Describe the primary instructional strategies that the school will expect teachers to master and explain why these strategies will result in increased academic achievement for the targeted student population.*

The primary instructional strategies are as follows:

Hands on learning

Students will be engaged in their natural environment to explore and discovery new ideas and concepts.

Children will be free to express the knowledge and connections made from the resources provided.

Narration

Students will have the opportunity to retell or tell back what they have learned in each subject area. As the student develops in this skill, teachers will be able to assess students ability to gather, condense and illustrate information effectively.

Individualized Instruction

Each student will be treated as a person with his own abilities and strengths. Skills and ideas will be taught at a personal level so that each

student can progress at his own pace with materials at each level.

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

The Charlotte Mason Model of education will prepare each student for life-long learning. Through a broad curricula including reading well written literature, the arts, science, math and habit training, students will have a wide knowledge base to pursue any career of their choice. One of Mason's purposes for a very broad curriculum was exactly to provide students with a broad experience base from which to select a career.

Through support from parents, teachers and staff students will be encouraged to assess their personality and talents to find a fit for post secondary education.

6. *If implemented, describe how the proposed charter school will meet the Future-Ready Core requirements. Provide details on how the students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts?*

Students at HLA are preparing for life-long learning well after their high school years. Credit hours will be earned through the basic core classes. Grades will be earned from individual papers, written narration, subject notebooks and oral assessments that can include drama, skit or music. Students will have the opportunity as an elective to conduct an internship in a particular field of interest. Helping students to excel after high school in the desired field of study is a priority at HLA. All courses taken and grades received are included on transcripts. Also, notes on the transcript can detail any additional activities or internships involved in.

7. *Provide a school academic calendar in Appendix C (minimum of 185 instructional days or 1,025 hours)*
8. *Describe in a brief narrative below on how the calendar coincides with the tenets of the proposed mission and education plan.*

HLA will provide 185 instructional days and 16 teacher development and training days. The success of HLA's mission and education plan will be trained teachers understanding how to facilitate in the classroom. At the beginning of the year, two weeks of training and planning has been provided to ensure teachers understand the curriculum.

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 Charlotte Mason Model of Education applies to every student's need. Every student has the ability to learn and teachers will facilitate the classroom with that level of instruction. In the beginning of the school year, assessments will be given. From those results teachers will organize based on students' needs a personalized intervention program. Differentiated instruction using narration will enhance the learning for students at any level. Scaffolded learning environments will provide assistance for

struggling learners.

Daily and weekly assessments in the classroom will help decide what intervention if needed and how much progress has been mastered. Upon acceptance and entrance into HLA, English Language Learners will be determined and the teacher will be notified. For students not at grade level additional assistance will be provided. Small group instruction with a focus on well written children's books to help students develop attention, focus and the ability to retell knowledge heard. ELL students with challenges in reading will have additional help with language develop.

The Charlotte Mason Method focuses on the "Science of Relations". Student and teacher will develop lasting friendships and bonds during our three year class cycle. Ideally, depending on when the child enters HLA, the same teacher will have that student for three years. That allows ample time for building relationship and assessing growth or progress in student's skill and abilities. Early in the year communication with parents reassuring that parent and teacher have a clear understanding of individual student goals. HLA desires that every student reaches his/her goals and potential. The schools focus is to help each child achieve.

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 ELL students.*
- c) Plans for monitoring and evaluating the progress and success of ELL students, including exiting students from ELL services.*

1. Notification of ELL students will be provided after enrollment through the Home Language Survey. After reviewing student's previous records a decision will be made if the cause or reason is an English language barrier. Students will then be assessed to determine explanations.

2. Parental involvement will be key in the academic success of an ELL student so the parent will be notified early. The teacher, education consultant and parent will work closely to determine possible intervention strategies.

3. Continual assessments in the classroom environment will help determine ELL students expressive and receptive language abilities. Studies have shown a direct correlation between children's skills and future reading. Consistent narration develops greater word knowledge and various abilities. These students will be monitored and will have additional times for narration and reading aloud. Assessments will be given to see students level and then exited from the program.

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.*

Academically gifted students will stay in the classroom. Teachers will

identify them through assessments, individual course work and observations. After talking with parents a plan will be developed. Extra or more in depth course work and assignments will be provided to keep that child engaged.

Exceptional Children

*The public charter school cannot deny admission to any child eligible for special education services as identified under the federal legislation Individuals with Disabilities Education Improvement Act (IDEA), IDEA regulations, and Article 9 115C of the North Carolina General Statutes, North Carolina Policies Governing Services for Children with Disabilities. **All public schools are responsible for hiring licensed and 'highly qualified' special 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. New students with need for special educational services are protected under Section 504 of the Rehabilitation Act will be identified by first conferencing with parents. All HLA parents are greatly encouraged to meet with their teacher and discuss any and all educational, character, and social needs of the student. HLA will also request all previous school records from any institutions where the child had previously attended.

2. Teachers will be working closely with students on an individual basis in each subject area. Teachers will also be keeping a student notebook which will record all progress, or lack of progress, each student is making in all areas of learning - academic, character, social, etc. Each teacher will be striving to create a strong relationship with each child which will allow them to guide the child through all their difficulties. If extreme difficulties come to light, then further "formal" assessment will be conducted on the student with the parent's permission. Resources such as Woodcock-Johnson III testing and other assessments which follow state guidelines will be used to identify specific disabilities.

3. Heritage Learning Academy will take the utmost care to keep all records secure and private and will follow all state guidelines on handling forms and files.

a) When requesting information from previous schools, HLA will send a form directly to that institution. Record's will only be accessible to the student's care team.

b) Records will be kept in a locked filing cabinet in the administrative offices. Completed teacher assessment notebooks will also be securely stored in the administrative offices.

c) HLA will follow all state and federal law mandates on completing chart reviews and will make sure all forms are present and current. On-going evaluations, parent meetings, and IEP meetings will be overseen by the child's care team leader. This employee will coordinate all paperwork and activities involving this student and make sure all laws are being followed.

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. Because Heritage Learning Academy is based on Charlotte Mason's philosophy of education, the entire purpose of the school is to encourage, guide and challenge every child where they are each day; this includes children of all learning and physical abilities. HLA will meet all state and federal mandates listed in the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act, and the Americans with Disabilities Act. HLA will contract the necessary services as identified by need which the school cannot otherwise meet.

Children will be placed in their age appropriate classroom and work with a teacher for 3 years. They will work at their own pace with individually picked curricula, as will all children. This allows for all the children to understand that they are all different and moving at different speeds. The relationship created between the teacher and the student allows for personal attention and extended care when needed. HLA's plan for low student to teacher ratio in a classroom will facilitate even more personal tutoring when needed. Many of the activities such as listening to literature read aloud, outdoor nature study, notebooking, and narrating can be done by children of all abilities. Charlotte Mason's philosophy is welcoming, nurturing, and challenging to all students.

One of the school's greatest goals is to educate its parents as well as its students. Parent meetings which will educate parents in educational philosophy, learning styles, teaching methods, habit training and many other skills related to child education will be presented on a monthly basis. Anyone in the community is welcome to attend. Educated parents are one of the biggest advantages any student has especially for a child with learning disabilities.

2. Continual assessment is one of the star features of HLA. In order to provide an intriguing and engaging curricula and learning experience for each child, the teacher must always be evaluating how each child is progressing in all areas. This will allow us to catch any problems as soon as they arise. Each child that is deemed disabled will be appointed a care team which will include their parents, classroom teacher, teacher assistant, administrator and a specialist if needed. This team will work hard to ensure that all students with disabilities will receive a Free and Appropriate Public education as outlined by FAPE.

3. The HLA care team for each student will work closely at all times, so that all parties are monitoring the implementation. The care team leader will be responsible for providing charts, files, assessments and therapies as needed for the student in order to comply with state law.

4. HLA will hire any specialist needed to meet the needs of the students, and will allocate funds for any needed equipment related to therapies. The Charlotte Mason Method is all inclusive when it comes to meeting children's needs.

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 **ALL** students. These standards should set forth what students in the **last grade served** will know and be able to do. Be sure to include plans for the "At-Risk" population.*

1. Heritage Learning Academy's students will have access to a broad curriculum that is not grade level specific, so that each child is offered a rich learning experience with no ceiling above and a strong foundation below. Academic performance standards will be high and attainable through the development of the habit of perfect execution and the habit of attention. Because children learn at different rates and plateaus or rest periods in skill attainment may affect individual performance, differentiated education will be offered to each student after careful portfolio assessment and conferences with teachers and mentors within the Charlotte Mason community. Differentiated learning will allow HLA to provide high yet achievable academic standards which will meet or exceed the state Common Core standards.

At each grade level in grades K-3, students will be required to show steady academic progress and expected to show advanced academic prowess in the following key areas:

- 1) Handwriting and copying skills
- 2) a supported understanding of mathematical computation and concepts
- 3) a knowledge of and an affinity for the natural world
- 4) reading ability and comprehension
- 5) a building ability to retain information through the habit of attention
- 6) A progressively complex ability to narrate or retell knowledge retained
- 7) a strong sense of duty to behave well, respect others, and show compassion
- 8) A stronger ability to understand more philosophical concepts such as impulsive, concentration, exuberance, strategy, and perseverance.

In addition to the areas above, at each grade level in grades 4-5 and above, students will be required to show steady academic progress and expected to

show advanced academic prowess in the following key areas:

- 1) the ability to read and understand great literature of the past and a resulting increase in comprehensive critical thinking skills.
- 2) advanced mathematical understanding and a working knowledge and understanding of the lives of the great mathematicians of the past
- 3) a strong connection with the natural world as evidenced by a building body of knowledge and a specific, measurable understanding of environmental concepts and man's obligation to nature.
- 4) A stronger ability to understand deeply philosophical concepts that are less measurable via assessment such as motive, judgement, bitterness, joy, compassion, understanding, patience, relationship, peace, conflict, pride, arrogance, love, forgiveness, and the brotherhood of man.

2. Heritage Learning Academy will utilize portfolios and notebooks to assess and record examples that support student achievement. Students will also be evaluated by teachers through regular, individual conferences and parent informational conferences. Writing rubrics and other forms of assessment will be used in areas where skill improvement may be subjective. Outside mentors may also be called upon to confer with teachers and provide advice for individual students whose progress seems stalled or slow compared to peer portfolios, and remedial assistance will be offered.

HLA's reliance on whole books rather than curriculum or textbooks establishes a different model than those carry predictable, set, grade level outcomes. Schools using the Charlotte Mason model tend to offer higher levels of achievement that surpasses grade level since grade level texts are discouraged with the exception of elementary math. This fact, combined with a steady reliance on individualized attention, if necessary through parent volunteers and outside mentors, should guarantee success for the typical HLA student.

3. After portfolio and notebook assessments as well as end of grade tests and state mandated tests, each student will be recommended for advancement based on reliable, measurable results keyed to HLA's Scope and Sequence.

There should never be any question regarding a student's ability to function at the next grade level the following year since mentors and remedial instructors will have addressed any potential learning or instructional issues earlier in the school year. However, if an at risk learner or ELL learner still appears to be struggling or not functioning at grade level, an individualized or differentiated plan will allow for future progress. Remedial instruction will bring each student's plan to the principal for approval on a case by case basis. HLA will not advance students who are not working at grade level but will instead offer increased remedial instruction and involve parents in all decisions regarding advancement.

4. Future-Ready Core requirements will be the exit standards for students graduating high school with intentions of college. Special needs students will have a plan to enhance their strengths and goals for life after high school.

Student Conduct:

*Provide a brief narrative that disseminates how student conduct will be governed at the proposed charter school and how this plan **aligns** with the overall mission and proposed Education Plan of the charter school.*

Provide a draft copy of the student handbook specific to the proposed charter school within the appendices (Appendix D).

Be sure to include:

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

Heritage Learning Academy mission is to develop students of character and purpose. In promoting that mission students will be trained daily in developing good habits. From those skills developed students will be prepared citizens.

If violations occur the Principal will then notify teachers and parents involved. Each violation will be handled on a case by case basis. Based on the instructions in the handbook, administrators will be advised on how to handle each case.

IV. GOVERNANCE, OPERATIONS and CAPACITY

(No more than ten total pages in this section)

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

Governance:

Private Nonprofit Corporation:

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

Name of Private Nonprofit: Heritage Learning Academy

Mailing Address: P O Box 680402

City/State/Zip: Charlotte, NC NC 28216

Street Address: 1526 Highfield Ct

Phone: 704-391-9887

Fax: 704-391-9887

Name of registered agent and address: Yolonda Mason
1526 Highfield Ct.
Charlotte, NC 28216

FEDERAL TAX ID: 46-4131469

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 E)
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 initial members of the nonprofit organization.

Board Member Name	Board Title	County/State of Residence	Current Occupation
Yolonda Mason	Chairperson	MECKLENBURG	Educator

Dina Sawyer	Secretary	MECKLENBURG	Criminal Justice
Waunea Morrison	Board Member	MECKLENBURG	Health and Human Services
James Mason	Treasurer	MECKLENBURG	Teacher
Misty Spinelli	Board Member	MECKLENBURG	Educator/Curriculum Specialist
Megan Hoyt	Board Member	MECKLENBURG	Writer/Educator
Tabatha Brown	Board Member	WAKE	Human Resources
Gregory Warren Rouse	Board Member	Out of State	College Student/Marketing&Law

Please provide the following in this location of the APPLICATION:

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.*

HLA's Board of Directors will govern and perform all duty by law, Articles of Incorporation or the bylaws. The four main responsibilities of the Board are:

- Promoting the school's mission and making decisions with the school's mission as the focus
- Establishing and managing school policies
- Hiring and evaluating Principal position
- Overseeing and forecasting the school's budget

The Board has committee's that will assist in the above duties. The sub-committee's are Finance, Marketing, Curriculum, Facility and Fundraising. Each board member will serve on at least one committee.

The Board of Directors will recruit for the Principal position through, conferences, networking and advertising in newspapers and online websites. The board will select the Principal by majority vote. The Board will collect survey data from teachers, parents and students to evaluate the effectiveness and progress of the Principal.

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

The board includes at least five members and no more than fifteen. Currently we have eight board members with various skill sets both educationally and professionally. The school has several board members who are skilled in the Charlotte Mason Model of teaching. These persons combined have almost forty years of experience implementing Charlotte Mason methods. Also we have a curriculum specialist on the board. Our business professionals have experience in banking, teaching, criminal, health and nutrition, marketing and human resources. HLA believes that a diverse board will make for a successful school. In the future we hope to recruit for additional board members with experience in accounting and law.

3. *Explain the procedure by which the founding board members have been recruited and selected.*

If a position is vacant, how and on what timeline will new members be recruited and added to the board?

The Board at HLA desires to maintain diversity because the current board includes members from different age groups, professional backgrounds, gender and ethnicity. The current board members were recruited and selected based on the skill sets and expertise needed to govern the school successfully.

Currently, HLA has eight board members and is looking to increase to 15 board members. The board has developed sub committees for finance, facility, marketing, curriculum, and fundraising. The board plans to seek out potential board members from members serving on the sub committees. This allows the board an opportunity to observe a potential board member's commitment, ability and skill levels. Because of these being in place the time frame for adding members to the board will be short because the mindset is to have a list of potential board members available from the sub-committees.

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

The board currently meets once a month at 6:30 PM.

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 J).

As part of orientation new board members will read HLA's charter. This will bring each member current on the board's mission, goals and objectives. New board members are encouraged to view the webinars provided by the state. Currently, each board member is encouraged to attend the webinars provided by the state. All boards members are expected to read Charlotte Mason Reviewed by Jenny Knight. HLA plans to attend conferences, workshops, meetings and seminars held for developmental and governance training. Also the Board will use materials provided by Brian L.Carpenter on effective board governing to maximize charter school quality.

Board Members are to attend meetings and trainings. If a board member has excessive absenteeism then the board member can be removed from the board by majority vote.

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.

HLA will identify and address conflicts of interest by the bylaws Article IV Section 14. Each board member will be asked to sign a Conflict of Interest form. This will prove that all staff, board of directors and employees are aware of the policy. If a conflict does arise for a board member then that member will not be able to vote on that particular issue or make any suggestions or discussions concerning the topic.

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

The board will vote on all school policies. Based on the school's philosophy and mission and the benefit of the students of the school will determine if the policy will be adopted for the school. The principal who is a non voting member can present potential policies to the board and participate in discussions. However the board members by a majority vote at that meeting will decide if the policy will be adopted.

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.*

HLA's board will take full responsibility of governing the school. The Board of Directors has assigned sub committees to help fulfill the mission. These sub committees: Facility, Marketing, Finance, Curriculum and Fundraising will consist of at least one board member. Each committee will report to the Board of Directors.

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

The following steps shall be followed if you have a specific concern with a Heritage Learning Academy administrator, teacher, or staff member:

Step 1: Concerns involving administration, teachers, or staff members should first

be addressed with the individual(s) directly involved.

Step 2: If the issue is not resolved to the complainant's satisfaction, the complainant should address the concern with the School Principal.

Step 3: If the issue is still not resolved to the complainants satisfaction (or if the

specific issue concerns the School Principal), a written complaint may be filed

with Heritage Learning Academy's Board Chairperson.

The following steps shall be followed if you have a specific concern with a policy,

procedure, or practice at Heritage Learning Academy:

Step 1: Contact a school administrator with the specific concern(s), providing

possible solutions to help address the problem.

a. If the concern is directly related to administrative practices or procedures, you should address your concern directly to the Principal.

b. If your concern deals specifically with school policy, you should address

your concern with the Principal. He may request that your concern be added to the next Board meeting agenda. The Board Chairperson has discretion over Board Meeting Agenda items.

Step 2: If the issue remains unresolved (or if the specific issue concerns the Principal), a written complaint may be filed with HLA's Board President/Chairperson.

The following procedure applies if you feel you or your student has been treated

unfairly, been the victim of discrimination, or received treatment in a manner

which is in violation of state or federal law:

Step 1: A complainant shall complete, sign, and submit the written grievance

form to the Principal. The Principal shall investigate the matter and reply in writing to the complainant within 10 business days of the receipt of the complaint.

Step 2: If the complainant wishes to appeal the Principal's decision he/she may submit a signed statement of appeal to Heritage Learning Academy's Board Chairperson within 10 business days after receipt of the Principal's response. The Board Chairperson may meet with some or all of the parties involved, formulate a conclusion, and respond in writing to the complainant within 10 business days of receipt of the appeal.

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

Include in the Appendices:

1. 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). (Appendix F)
2. A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix G).
3. 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 H).
4. 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 I)
5. Copy of any board policies if adopted already (Appendix J).
6. Copies of meeting minutes (if available), relevant to the development of the charter school plan, during the application process (Appendix K).

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 M, 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, course offerings and align with the proposed budget.

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

Heritage Learning Academy is committed to finding excellent qualified teachers. Open positions will be posted on HLA's website, local employment security commission, local colleges/universities, various social media sites and local newspapers. HLA will adhere to both State and Federal laws in all of its employment practices.

- 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.*

All employees of HLA will be employed by the Board of Directors. However, the Principal is the only position that the Board of Directors will recruit and hire. All other positions the Principal and an assigned committee will interview all prospective applicants and run background checks. Recommendations for potential hires will be presented to the governing board. Final approval for the hiring of all employees will come from the Board of Directors.

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

Staff members will go through a multi-step hiring process. Each position will have a deadline to apply. At the close of each position, all resumes will be reviewed. Top candidates will go through a telephone interview. Final candidates will be asked to participate in an in-person interview with the Principal and assigned committee. Final candidates may be asked to bring in sample lesson plans or applicable position specific project at the in-person interview. After all in-person interviews are held, interview feedback is given to the entire board for a unanimous/majority vote to make a contingent job offer. Contingent job offers will be offered to the final candidate and are confirmed with satisfactory results from their criminal background checks and verification of the right to work in the US.

When staff performance is below standard, employees will be placed on a performance improvement plan. The length and specifics of the plan will be outlined by the Principal and approved by the Board of Directors. Should the employee fail to improve his performance and meet the necessary performance standards, they will be subject to termination as approved by the board.

There are times however, where an employee's actions warrant immediate termination. Such times include but are not limited to:

- Inappropriate, violent or sexual behaviors toward others
- Harassment or discrimination of others
- Use of drugs, tobacco, or alcohol on school property

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

employment.

Heritage Learning Academy's salary range for Principal, Teachers, Staff and Paraprofessionals will be fair and comparable to the North Carolina salary schedule. However, the Board of Directors realizes the importance and benefit of a competitive salary. HLA may elect not to use the benefits provided by the state. All full time staff members will be offered benefits.

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

HLA's termination and grievance policies are outlined in the employee handbook as follows:

Since employment with HLA is at will, both the employee and HLA have the right to terminate the employment relationship at anytime and for any reason not prohibited by law, with or without notice.

However, it is requested that employees give a four (4) week or at minimum two (2) week written notice when voluntarily resigning.

At the time of resignation whether voluntary or involuntary, the employee shall return all files, records, keys and any other materials or equipment that are HLA property.

Grievance Procedure:

We encourage employees to engage in open communications about all aspects of our organization. Employees are encouraged to openly discuss any suggestions or concerns with the Principal. Should an employee request their workplace concerns be reviewed by upper management, the following process should be followed.

Step 1: The employee should state their grievance in writing and submit to the Board of Directors. Upon receipt of the written grievance, the Board of Directors will review the grievance and determine whether a formal hearing will be scheduled.

Step 2: Within 14 days of receipt of the written grievance, a Board representative will contact the employee to inform them of the decision of whether a formal hearing will be scheduled. If a formal meeting will be scheduled, it will be done at mutually convenient time and place for the employee, Board of Directors and all other parties involved.

Step 3: Once the board holds a formal meeting, a decision will be made by majority vote. The decision shall be rendered in writing to all parties within seven calendar days of the completion of the final hearing.

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

Currently, no positions will have dual responsibilities at this time.

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

HLA will provide the additional staff to meet the needs of the students at the school. Charlotte Mason's Model of Education will benefit each child individually. Trained teachers will have skills to provide instruction for ELL and gifted learners. Through instruction child will varying abilities

can benefit from implementing Charlotte Mason Methods.

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

Principal

- Must believe strongly in the school's mission and goals of a Charlotte Mason Model of Education.
- A bachelor's degree is required along with proof of leadership success. Master's degree preferred.
- A commitment to the parents so well verbal and written communication skills are necessary.
- Ability to recruit and maintain quality teachers experienced in or trainable in the Charlotte Mason Model of Education.
- Reports to and communicates with the Board of Directors.

Assistant Principal

- Assists the Principal in leading the school's mission and goals
- Provides assistance in teacher management, curriculum and parental involvement.
- A bachelor's degree with strong administrative skills.
- Assists in student activities and registration.

Administrative Assistant

- Assistant will perform basic clerical functions like answering the phones, greeting & signing in visitors, copying, faxing and providing overall admin support to the HLA staff. This position will report directly to the Principal.

Teachers

- As per NC Charter school law, at least 75% of teachers will be licensed in the subject areas in which they are teaching.
- Teachers trained in the Charlotte Mason Model of Education the school's philosophy will be top priority.

Teacher Assistants/ Floating Teacher Assistants

- Teaching assistant and/ or teaching experience
- Excellent classroom management skills
- A high school diploma or equivalent

Custodian

- Ability to perform manual labor
- Communicate effectively
- General upkeep to the facility

Staff Evaluation and Professional Development

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

At least 75% of teachers will be responsible for holding teacher certificates.

Exceptional teachers will have the proper teaching licensure and certificates.

Assistant teachers and floating teacher assistants will have professional development.

2. *Provide a detailed plan noting how the school will mentor, retain, and evaluate staff in a format*

that matches the school's mission, educational program, and meet the teacher certification and licensure requirements for teachers as prescribed by state law and No Child Left Behind. Be sure this overview matches with the projected staff and funding of the proposed budget section.

At HLA, teachers are leaders, guides and mentors. Teachers will have opportunity to share successful techniques used in the classroom. Teachers will mentor and learn from each other. HLA will develop a mentor program where experienced Charlotte Mason instructors will share with new teachers. The teachers will meet with the mentor at least weekly and then a classroom observation will be done quarterly. This will give new teachers feedback and guidance in staying aligned with HLA's mission.

HLA's educational consultant will work with teachers also on a regular basis to ensure HLA are achieving Charlotte Mason relational education.

Several experienced Charlotte Mason instructors are in the Charlotte and surrounding areas. Teacher work days are provided through the calendar year for teachers to grow and glean from the Charlotte Mason Method to better enhance the classroom.

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

Teacher workdays are included in the calendar year for teachers continued professional development. Teachers and staff will be asked to attend the Charlotte Mason Education Annual Conference, and mini seminars will be held at the school during teacher work days. Mini-seminars will cover various topics of interest. Having training will help implement the Mason Model of Education. Also, frequent GoToMeetings with Gillingham Charter staff in PA will offer feedback, guidance and support for HLA's staff.

- 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.*

During the summer months teachers will read Charlotte Mason Reviewed by Jenny King. The annual Charlotte Mason conference is offered in the summer prior to school opening. Also, our educational consultant will prepare additional training days to educate our staff on narration, relational education, habit training, notebooking, nature study and much more. Observation days, a book study, and staff meetings geared to sharing insight will be scheduled.

- 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.*

Professional development will be provided in the summer before the school year begins. Teachers will attend the annual Charlotte Mason conference hosted by Childlight USA. Professional development days will be provided before the school starts. Trained Charlotte Mason instructors will come and hold seminars on topics like living books, narration, nature study, art study and composer study. Detailed instructions on how to facilitate in the classroom and implement Charlotte Mason methods will be shared. Weekly staff meetings keep staff up to date and familiar with how other staff are using Charlotte Mason techniques in their classroom.

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)).

HLA's marketing plan will include the following:

- Advertising in local publications like Creative Loafing and Charlotte Parent
- Sponsoring Open House events to further foster community involvement
- Social media will serve as a marketing tool as well.
- Advertising directly to preschools, YMCA's, child care centers, recreation centers, youth athletic teams and churches.

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. HLA will be equipped with a comprehensive website that will keep the parents and community updated on the charter school progress. Informational meetings will be held at libraries, recreation centers and churches to inform as well as educate parents about HLA's unique philosophy and mission for the school. Additionally, Facebook will also be used to provide continual updates on the progress of the school. From the survey that was conducted parents who were interested in updates provided an email address. Newsletters will be provided via email to inform prospective parents and the community about informational meetings, open houses and open enrollment dates. HLA is working diligently to provide auto phone dialers to update parents of current events that are held.

2. HLA is well aware and whole heartily believes that involved parents make for a successful school but most importantly successful students. Parents will be able to access the website to access student's grades and relevant activities. Parents will be encouraged to attend monthly collaborations to help build relationships between parents, students and staff. This time will also be used to have refreshments and share in educating about the Charlotte Mason Model of Education. Informed parents make better decisions for their students so information on parenting, nutrition, behavior and life skills will also be provided. Many of these seminars will be unique and comprehensive.

The presence of parents in the school regularly is a vital part to the success of the school. Parents will volunteer a minimum of 20 hours per academic year. Those hours can be used in the classroom, on field trips, assisting on the grounds or helping school administration. Every parent with

his/her unique abilities will be able to contribute in some way to help show support for their student and the school.

Admissions Policy

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

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

1. Heritage Learning Academy will not discriminate against any student based on ethnicity, national origin, gender, or disability. Admission to HLA will not be based on aptitude, gender, race, disability, athletic performance, creed, religion or ancestry. The open enrollment process will begin tentatively in early November through late February 2015. Applications can be found on the website www.hlacademy.org

2. Students will be selected in the order of application submission date. Students of faculty, board members, and siblings will be given priority in the admission process. In the event that openings remain after the close of enrollment date, we will continue registration on a first come first serve basis until all spaces are filled.

If the number of applicants exceeds the number of openings for a particular grade level, a lottery will be held. The names will be randomly drawn and students will be selected based on their names being drawn, The lottery will be held the first board meeting in March. Those students that were not selected will be added to a waiting list based on the order the student's name was drawn.

Each school year HLA will assess the demographics of the student body. We will adjust our marketing efforts each year to ensure that the demographics of the student body is representative of the community we serve.

Withdrawal: To withdraw from HLA the student and parent/legal guardian must meet with the Principal and present a written request to withdraw. The student's record will be released during this meeting.

Transfers: To transfer from HLA the student and parent/guardian must submit a request for transfer to the Principal for review and compliance.

Re-enrollment: If a student transfers or withdraws the student may re-apply and they will be added to the waiting list for the up coming year.

Pre-Admission Activity: HLA will sponsor several open houses and informational meetings prior to the open enrollment and admission period.

These events will allow parents, teachers and administrators the opportunity to meet and discuss the mission and purpose of the school.

PROJECTED ENROLLMENT 2015-16 through 2019-2020

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Charlotte-Mecklenburg Schools
 LEA #2 Gaston County Schools
 LEA #3

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

	2015-2016			2016-2017			2017-2018			2018-2019			2019-2020		
	LEA 600	LEA 360	LEA 000	LEA 600	LEA 360	LEA 000	LEA 600	LEA 360	LEA 000	LEA 600	LEA 360	LEA 000	LEA 600	LEA 360	LEA 000
Kindergarten	34	10	0	17	5	0	17	5	0	34	10	0	34	10	0
Grade 01	17	5	0	34	10	0	17	5	0	34	10	0	34	10	0
Grade 02	17	5	0	17	5	0	34	10	0	34	10	0	34	10	0
Grade 03	17	5	0	17	5	0	17	5	0	34	10	0	34	10	0
Grade 04	17	5	0	17	5	0	17	5	0	34	10	0	34	10	0
Grade 05	17	5	0	17	5	0	17	5	0	34	10	0	34	10	0
Grade 06	0	0	0	17	5	0	17	5	0	34	10	0	34	10	0
Grade 07	0	0	0	0	0	0	17	5	0	34	10	0	34	10	0
Grade 08	0	0	0	0	0	0	0	0	0	34	10	0	34	10	0
Grade 09	0	0	0	0	0	0	0	0	0	0	0	0	34	10	0
	119	35		136	40		153	45		306	90		340	100	

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.

HLA will endeavor to make every effort that no child will be denied access to the school because of a lack of transportation. If needed students can and will be transported via bus to the school. However, in an effort to build relationships among parents and students, HLA will encourage parents to coordinate carpool opportunities. HLA's administrative staff can help coordinate carpool opportunities for students who are in need. Depending on the secured location for the school, the Charlotte Are Transit System (CATS) could be an option for students.

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.

Students at HLA will bring a healthy lunch and snack from home. However, if there are students lacking lunch then lunch will be provided through contracted food vendor services. As the student population grows the school will evaluate students needs and if needed apply for the Federal Free and Reduced Lunch Program.

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		\$1,285.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$2,381.00
Property Insurance	\$250,000		\$450.00
Motor Vehicle Liability	\$1,000,000		\$181.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other	\$1,000,000		\$5,555.00
Total Cost			\$10,184.00

*The applicant must provide a quote from an insurance provider as part of this application (as Appendix O) 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.

heritagelearning 12/06/2013

(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).

Upon submission of the application, HLA has not secured a building location. The Board of Directors has been actively networking to find potential buildings in our target location.

If a building is not secured through this route, the following steps will be taken:

- * Determine a list of requirements for the facility ie(size,classrooms, offices, outside space)
- * Consult with a commercial real estate agent to help locate a building.
- * Reviewing and visiting potential properties via MLS listings, referrals and real estate agent.
- * If an existing building is not located then decide if land with modulars units could be a short term option.
- * Once a location is found, the Board of Directors will discuss lease options and renovations if needed and vote on the location.
- * Upon securing a location, negotiating lease terms and entrance time for open houses, informational meetings and preparation for school opening.
- * To receive the educational certificate of occupancy, the local county building inspector will be contacted.
- * After obtaining the educational certificate of occupancy, the information will be submitted to the Office of Charter Schools.

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 a facility has not been secured, then HLA will hire a real estate broker

to locate a temporary facility that meets our educational needs. If that is not an option, then locating land where leased modular units could be used will be the next step. HLA will confirm that an modular or temporary facility meets all requirements to obtain an educational certificate of occupancy.

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 2015-16

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

*Refer to the
Resource Manual
Finance Section
for guidance on
estimated funding
amounts*

State Funds: Charter schools receive an equivalent amount per student as the local education agency (LEA) receives per student receives from the State. Funding is based on the 1st month average daily membership.

- In year 1 – Base state allotments are determined by the LEA in which the student resides
- In year 2 and beyond- Base State allotments are determined by the LEA in which the school is located.

Local Funds: Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.

Federal Funds: Charter schools must qualify and apply for the individual federal grants based on their population of students.

REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS

LEA #1 600 - Charlotte-Mecklenburg Schools

Revenue	2013-2014 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2015-2016
State Funds	\$4,582.77	119	\$545,349.63
Local Funds	\$2,377.00	119	\$282,863.00
Federal EC Funds	\$3,743.48	11	\$41,178.28
Totals			\$869,390.91

LEA #2 360 - Gaston County Schools

Revenue	2013-2014 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2015-2016
State Funds	\$4,533.03	35	\$158,656.05
Local Funds	\$1,269.00	35	\$44,415.00
Federal EC Funds	\$3,743.48	4	\$14,973.92
Totals			\$218,044.97

Total Budget: Revenue Projections 2015-16 through 2019-2020

INCOME: REVENUE PROJECTIONS	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
-State ADM Funds	\$704,006	\$828,715	\$960,274	\$1,978,163	\$2,263,898
-Local Per Pupil Funds	\$327,278	\$385,247	\$446,406	\$919,595	\$1,052,426
-Exceptional Children Federal Funds	\$56,152	\$67,862	\$78,635	\$161,988	\$185,386
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$1,087,436	\$1,281,824	\$1,485,315	\$3,059,746	\$3,501,710

***If the applicant is depending on other funding sources or working capital to balance the operating budget, please provide documentation such as signed statements from donors, foundations, bank documents, etc., on the commitment of these funds. If these figures are loans, the repayment needs to be explained in the narrative and found within the budget projections.**

Assurances are needed to confirm the commitment of these additional sources of revenue. Please include these as Appendix R.

Personnel Budget: Expenditure Projections 2015-16 through 2019-2020

The personnel list below may be amended to meet the staffing of individual charter schools: This list should align with the projected staff located in the Operations Plan (Appendix M).

BUDGET EXPENDITURE PROJECTIONS Personnel	2015-2016			2016-2017			2017-2018			2018-2019			2019-2020		
	<i>Num Staff</i>	<i>Avg Salary</i>	<i>Total salary</i>	<i>FTE</i>	<i>Avg Salary</i>	<i>Total salary</i>									
Administrative & Support Personnel:															
Principal	1	\$60,000	\$60,000	1	\$61,800	\$61,800	1	\$63,654	\$63,654	1	\$65,564	\$65,564	1	\$67,531	\$67,531
Assistant Principal	0	\$0	\$0	1	\$45,000	\$45,000	1	\$46,350	\$46,350	1	\$47,741	\$47,741	1	\$49,173	\$49,173
Administrative Assistant	1	\$20,000	\$20,000	1	\$20,600	\$20,600	1	\$21,218	\$21,218	2	\$21,855	\$43,710	2	\$22,510	\$45,020
Custodians	1	\$10,000	\$10,000	1	\$10,300	\$10,300	1	\$10,609	\$10,609	2	\$10,927	\$21,854	2	\$11,255	\$22,510
A - Total Admin and Support:	3	\$90,000	\$90,000	4	\$137,700	\$137,700	4	\$141,831	\$141,831	6	\$146,087	\$178,869	6	\$150,469	\$184,234
Instructional Personnel:															
Lead Teachers	7	\$36,500	\$255,500	8	\$37,595	\$300,760	9	\$38,723	\$348,507	18	\$39,885	\$717,930	20	\$41,081	\$821,620
Teacher Assistants	7	\$20,000	\$140,000	8	\$20,600	\$164,800	9	\$21,218	\$190,962	18	\$21,855	\$393,390	20	\$22,510	\$450,200
Floating Teacher Assistants	3	\$8,000	\$24,000	3	\$8,240	\$24,720	3	\$8,487	\$25,461	4	\$8,742	\$34,968	4	\$9,004	\$36,016
Art/Music Teachers	2	\$10,000	\$20,000	2	\$10,300	\$20,600	2	\$10,609	\$21,218	4	\$10,927	\$43,708	4	\$11,255	\$45,020
Foreign Language Teacher	1	\$15,000	\$15,000	1	\$15,450	\$15,450	1	\$15,914	\$15,914	2	\$16,931	\$33,862	2	\$16,883	\$33,766
Exceptional Children Teacher(s)	1	\$30,000	\$30,000	1	\$30,900	\$30,900	1	\$31,827	\$31,827	2	\$32,782	\$65,564	2	\$33,765	\$67,530
Educational Consultant	1	\$10,000	\$10,000	1	\$10,300	\$10,300	1	\$10,609	\$10,609	1	\$10,927	\$10,927	1	\$11,255	\$11,255
Substitute Teachers	2	\$600	\$1,200	2	\$618	\$1,236	2	\$637	\$1,274	4	\$656	\$2,624	4	\$675	\$2,700
B - Total Instructional Personnel:	24	\$130,100	\$495,700	26	\$134,003	\$568,766	28	\$138,024	\$645,772	53	\$142,705	\$1,302,973	57	\$146,428	\$1,468,107
A+B = C - Total Admin, Support and Instructional	27	\$220,100	\$585,700	30	\$271,703	\$706,466	32	\$279,855	\$787,603	59	\$288,792	\$1,481,842	63	\$296,897	\$1,652,341

Personnel:															
Administrative & Support Benefits															
Health Insurance	2	\$5,600	\$11,200	3	\$5,768	\$17,304	3	\$5,941	\$17,823	4	\$6,119	\$24,476	4	\$6,303	\$25,212
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Retirement Plan--Other	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	2	\$431	\$862	3	\$452	\$1,356	3	\$463	\$1,389	4	\$460	\$1,840	4	\$473	\$1,892
Social Security	2	\$2,274	\$4,548	3	\$2,386	\$7,158	3	\$2,442	\$7,326	4	\$2,429	\$9,716	4	\$2,496	\$9,984
Suta	2	\$356	\$712	3	\$374	\$1,122	3	\$383	\$1,149	4	\$381	\$1,524	4	\$391	\$1,564
D - Total Admin and Support Benefits:	8	\$8,661	\$17,322	12	\$8,980	\$26,940	12	\$9,229	\$27,687	16	\$9,389	\$37,556	16	\$9,663	\$38,652
Instructional Personnel Benefits:															
Health Insurance	15	\$5,600	\$84,000	17	\$5,768	\$98,056	19	\$5,941	\$112,879	38	\$6,119	\$232,522	42	\$6,303	\$264,726
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Retirement Plan--Other	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Social Security	15	\$2,274	\$34,110	17	\$2,386	\$40,562	19	\$2,442	\$46,398	38	\$2,429	\$92,302	42	\$2,496	\$104,832
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	15	\$431	\$6,465	17	\$452	\$7,684	19	\$463	\$8,797	38	\$460	\$17,480	42	\$473	\$19,866
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Suta	15	\$356	\$5,340	17	\$374	\$6,358	19	\$383	\$7,277	38	\$381	\$14,478	42	\$391	\$16,422
E - Total Instructional Personnel Benefits:	60	\$8,661	\$129,915	68	\$8,980	\$152,660	76	\$9,229	\$175,351	152	\$9,389	\$356,782	168	\$9,663	\$405,846
D+E = F - Total Personnel Benefits	68	\$17,322	\$147,237	80	\$17,960	\$179,600	88	\$18,458	\$203,038	168	\$18,778	\$394,338	184	\$19,326	\$444,498
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	11	\$315,661	\$107,322	16	\$366,070	\$164,640	16	\$377,033	\$169,518	22	\$530,282	\$216,425	22	\$540,557	\$222,886

Heritage Learning Academy

B+E = H - Total Instructional Personnel (Salary & Benefits)	84	\$164,761	\$625,615	94	\$169,763	\$721,426	104	\$174,836	\$821,123	205	\$208,917	\$1,659,755	225	\$214,617	\$1,873,953
G+H = J - TOTAL PERSONNEL	95	\$480,422	\$732,937	110	\$535,833	\$886,066	120	\$551,869	\$990,641	227	\$739,199	\$1,876,180	247	\$755,174	\$2,096,839

Operations Budget: Expenditure Projections 2015-16 through 2019-2020

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
	Administrative & Support:					
Office:	Office Supplies	\$3,000	\$3,090	\$3,183	\$3,278	\$3,377
	Paper	\$2,000	\$2,060	\$2,122	\$2,185	\$2,251
	Computers & Software	\$15,000	\$5,150	\$5,305	\$10,927	\$5,628
	Communications & Telephone	\$0	\$0	\$0	\$0	\$0
	Copier leases	\$0	\$0	\$0	\$0	\$0
Professional Contract	Legal Counsel	\$2,500	\$2,575	\$2,652	\$2,732	\$2,814
	Board Member Expenses	\$1,000	\$1,030	\$1,061	\$1,093	\$1,126
	Audit Fees	\$0	\$6,180	\$6,365	\$6,556	\$6,753
	Student Accounting	\$0	\$0	\$0	\$0	\$0
	Financial	\$20,000	\$20,600	\$21,218	\$21,855	\$22,510
	Other Professional	\$0	\$0	\$0	\$0	\$0
Facilities	Facility Lease/Mortgage	\$125,000	\$128,750	\$132,613	\$273,182	\$281,377
	Maintenance	\$5,000	\$5,150	\$5,305	\$5,464	\$5,628
	Custodial Supplies	\$2,500	\$2,575	\$2,652	\$2,732	\$2,814
	Custodial Contract	\$0	\$0	\$0	\$0	\$0
	Insurance (pg19)	\$10,500	\$10,815	\$11,139	\$11,474	\$11,818
	Other	\$0	\$0	\$0	\$0	\$0
Utilities	Electric	\$10,000	\$10,300	\$10,609	\$10,927	\$11,255
	Gas	\$2,500	\$2,575	\$2,652	\$2,732	\$2,814
	Water/Sewer	\$1,000	\$1,030	\$1,061	\$1,093	\$1,126
	Trash	\$0	\$0	\$0	\$0	\$0
Transportation	Buses	\$0	\$0	\$0	\$0	\$0
	Gas	\$0	\$0	\$0	\$0	\$0
	Oil/Tires & Maintenance	\$0	\$0	\$0	\$0	\$0
Other	Marketing	\$10,000	\$10,300	\$10,609	\$10,927	\$11,255
	Child nutrition	\$2,000	\$2,060	\$2,122	\$2,185	\$2,251
	Field Trips	\$5,000	\$5,150	\$5,305	\$5,464	\$5,628
	Travel	\$0	\$0	\$0	\$0	\$0
	Other	\$0	\$0	\$0	\$0	\$0
	K - TOTAL Administrative & Support Operations	\$217,000	\$219,390	\$225,973	\$374,806	\$380,425
	Instructional:					
Classroom Technology	Software	\$0	\$0	\$0	\$0	\$0

Heritage Learning Academy

Instructional Contract	Staff Development	\$10,000	\$10,300	\$10,609	\$21,855	\$22,510
Books and Supplies	Instructional Materials	\$0	\$0	\$0	\$0	\$0
	Curriculum/Texts	\$10,000	\$10,300	\$10,609	\$21,855	\$22,510
	Copy Paper	\$0	\$0	\$0	\$0	\$0
	Testing Supplies	\$6,000	\$6,180	\$6,365	\$13,113	\$13,506
	Other	\$0	\$0	\$0	\$0	\$0
	L - TOTAL Instructional Operations	\$26,000	\$26,780	\$27,583	\$56,823	\$58,526
	K+L = M - TOTAL OPERATIONS	\$243,000	\$246,170	\$253,556	\$431,629	\$438,951

Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
J - TOTAL PERSONNEL	\$732,937	\$886,066	\$990,641	\$1,876,180	\$2,096,839
M - TOTAL OPERATIONS	\$243,000	\$246,170	\$253,556	\$431,629	\$438,951
J+ M =N TOTAL EXPENDITURES	\$975,937	\$1,132,236	\$1,244,197	\$2,307,809	\$2,535,790
Z - TOTAL REVENUE	\$1,087,436	\$1,281,824	\$1,485,315	\$3,059,746	\$3,501,710
Z - N = SURPLUS / (DEFICIT)	\$111,499	\$149,588	\$241,118	\$751,937	\$965,920

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

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

1. *How was the student enrollment number projected?*

Provide an explanation as to why you believe there is a demand for the school that will meet this enrollment projection.

Provide the break-even point of student enrollment.

HLA provides a vital school choice option for families in the Southwest Charlotte area. After several Board discussions and viewing the near and over capacity of the schools in the area, opening as a K-5 school the first year and adding a grade per year would be most beneficial. In the Year 1 two classes for Kindergarten and one class for grades 1-5. Kindergarten is a popular time for parents considering a long term school options so two classes will be provided to meet the anticipated demand.

On November 5, 2013 Mecklenburg county residents voted yes for 2013 CMS bond referendum. However, the Pk-8 school projected to open August 2017 is not an immediate solution for the already overcrowded schools.

Assumptions in 5 year budget:

- For Personnel cost:

* The Principal position plays a key role in securing that the mission, goals and purposes are fulfilled. An individual with extensive knowledge and understanding of Charlotte Mason methods will be sought so the salary is competitive to meet that need.

* Lead Teacher salaries are slightly higher because the success of the school is contingent upon teachers skilled in implementing Charlotte Mason methods in the classroom. Also quality teachers may also need staff development on instructions in the classroom.

* Part-time floating teacher assistants will be provided for grades K-2. If student enrollment is low then having parent volunteers to assist would be another option for additional classroom assistance.

* Teachers training in Charlotte Mason Methods and Professional development for staff will be conducted through Childlight USA annual conference.

* The overall ratio for student to teacher is 22:1. Each class will have a full time assistant and for the lower grades K-2 an additional floating assistant making the ratio 8:1. This allows for more small groups and individual instruction to develop the skills of narration, habit training and character development.

* Student enrollment is a key factor in the budget. All revenue is from state and local funds. Federal funds are considered additional income when making expense projections. If enrollment is low then that would mean less

teachers, supplies, and curriculum which would decrease the budget.

* If needed expenses can be streamlined by adjusting expenditures, contracting services when necessary, accepting donations, implementing volunteers and establishing corporate partnerships.

The break even point for student enrollment is as follows:

- *2015/2016 - 140
- *2016/2017 - 158
- *2017/2018 - 169
- *2018/2019 - 304
- *2019-2020 - 324

Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.

The income revenue projections has a built in reserve each year to help set aside for any unexpected expenses.

However, the Board of Directors will endeavor to supplement with grants and fundraising. Several grant options have been researched with an intent to apply during the specified application enrollment period. Fundraising can take place now even before the school is open. This will bring awareness to the community about the school and also allow for possible donations. Donations can be monetary but not necessarily. Some donations can be materials, supplies and labor that might be needed. This will help decrease expenses.

Does the budget rely on sources of funds other than state, county, and federal (e.g. loans, donations etc.? If so, please provide the source and amount. Be sure that the appropriate assurances documentation is provided in the appendices

HLA's budget is solely from the state and local funds provided. As stated above, plans to apply for grants is strongly being considered. Providing additional funds for the school and promoting community awareness of Heritage Learning Academy, are two of the main goals for fundraising.

Provide the student to teacher ratio that the budget is built on.

22:1

2. *Does the school intend to contract for services such as student accounting and financial services, exceptional children instructional support, custodial etc. Describe the criteria and procedures for the selection of contractors and large purchases.*

Currently, the Board is researching options for student accounting and financial services. NC Public Charter Schools Association has submitted a contract for our review with LB&A CPA's in Matthews, North Carolina. The finance committee will conduct interviews and work closely with the firm. After interviews and researching each potential firm, the board will vote on which firm would best meet the school's needs.

3. *Explain how the budget aligns with the school's mission, curricular offerings, transportation plans, and facility needs.*

The budget aligns with the school's mission by placing the utmost importance on teachers and staff development. Teacher's salaries are competitive. Training for teachers will be provided through conferences but HLA can hire consultants trained in the Charlotte Mason method. The varied curriculum

offered will be used through well written literature, notebooks and journaling. Instead of additional curriculum expenses, field trips frequently visiting local places like Daniel Stowe Botanical Gardens and The Schiele Museum. HLA endeavors to build community among parents priority will be placed on possible carpool options for transportation. An adequate facility providing a calming environment and low teacher student ratios are important to the mission of HLA. Those budget line items will take precedence over administrative staff and specialty teachers because those services could be contracted.

4. *What percentage of expenditures will be the school's goal for a general fund balance?*

Describe how the school will develop the fund balance.

A general fund balance of 5% will be the goal of HLA, with plans of increasing fund balance percentage in following years. HLA will use all avenues of income to secure a fund balance. Securing additional funds through donations, fundraising and grants will provide resources to cover initial expenses.

5. *Provide a description of proposed financing structure. Include financing of facilities, other asset financing and leases.*

HLA's facility plan is to lease a facility for at least three years and then year 4 either purchase a larger facility or find another lease option. The current budget provisions can handle a leasing option for a facility.

7. *Will the school have assets from other sources (e.g. building, furniture, chairs, computers, etc.)? If yes, please provide a list. Note which are secured and which are anticipated, and include evidence of commitment for any assets on which the school's core operation depends*

Currently, HLA does not have assets from additional or other sources.

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

How will the school ensure adequate internal controls, including segregation of duties, safeguarding of assets, accurate and adequate recording keeping?

HLA will implement a system of checks and balances to ensure internal controls. Internally there will be one or possibly two signers for checks. All request for payments will need to be documented and signed prior to approval and payment.

Provide any known or possible related party transactions (relationship, description of transaction and estimated dollars involved)

Currently, there are no known related party transactions.

Provide the name and contact information of the independent audit firm who will conduct the annual financial statement audit. If a firm has yet to be identified please list the firms the board has investigated.

The Board of Directors has investigated the following firms:

LB&A CPA's
212 W. Matthews Street Suite 102
Matthews, NC 28105
704-841-1120 office
704-841-4901 fax

Rives & Associates, LLP
1023 West Morehead Street
Charlotte, NC 28208
704-372-0960 phone
704-372-1458 fax

