



Application Preliminary Evaluation Packet

For each section, please rate the response then explain your rating by specifying strengths and weaknesses in the space provided. Where applicable, you should elaborate on concerns by specifying additional information you would request or follow-up questions that you have.

- § Pass: The response demonstrates an understanding of key issues and the ability to start a charter school successfully although minimal clarification may be needed in places. It addresses the topic with clear, specific and accurate information that reflects thorough preparation. The application meets minimum components as evidenced by the check boxes of the rubric.
- § Fail: The response either fails to entirely address the selection criteria or addresses some of the criteria. The responses lack adequate detail and/or raise substantial concerns about the applicant's preparation for and ability to start or operate a charter school successfully. The application fails to address all of the minimum components as evidenced by the check boxes of the rubric.

Subcommittee Members:

Joe Maimone
Carol Ann Hudgens
Kathryn Mullen Upton
Eric Sanchez
Helen Nance
Mike McLaughlin
Sherry Reeves
Kristen Vandawalker
Tammi Sutton
Lisa Swinson

Date of Review:

10/20/2014

Legacy Academy of Charlotte - The mission of Legacy Academy is to instill in students a love of learning while engaging them through academic scholarship, strength-based leadership and character development, one child at a time.



NORTH CAROLINA CHARTER SCHOOL APPLICATION

Legacy Academy of Charlotte

Public charter schools opening the fall of 2016

Due by 5:00 pm, September 26, 2014

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
2014 Application Process
To open a charter school in the 2016-2017 school year

APPLICATION DUE DATE/TIME

September 26, 2014 A complete *online* application package, in the Office of Charter Schools **by 5:00 pm EST.**

Non-Refundable \$1000 Application fee due to the Office of Charter Schools

Application Fee Payment Details can be found on the Office of Charter Schools Website

APPLICATION SPECIFICATIONS

Applicants can submit applications prior to the deadline September 26, 2014 at 5:00 pm EST. **All applications 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 in the appropriate places within the application.
2. **Any** answer given within the application which is not original to the applicant, the applicant must provide a citation to the source of the answer.
3. Review all elements of your application for completeness before submitting. **An incomplete application will result in the elimination of the application.**
4. **Any** document attached to the application or within the online system **must be** in PDF format.
5. Late submissions **will not** be accepted. No exceptions.

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I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Legacy Academy of Charlotte

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

Name of non-profit organization under which charter will be organized or operated: *Legacy Academy of Charlotte, Inc.*

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

Name of contact person: *Kenneth Benton*

Title/Relationship to nonprofit: *Chair*

Mailing address: 706 N Berkeley Blvd.
Goldsboro NC 27534

Primary telephone: 919-735-7587 Alternative telephone: 919-735-7587

E-Mail address: legacy.academy@yahoo.com

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

County: MECKLENBURG

LEA: 600-Charlotte-Mecklenburg Schools

Was this application prepared with the assistance of a third party person or group?

No:

Yes:

If so, provide the name of the third party person or group. Bridgewoods Foundation

List the fee provided to the third party person or group. \$0

Provide a **full** detailed response of the assistance provided by the third party person or group while preparing this application and when the assistance will end.

Research, inquiry, background, review and edits of charter application.

This assistance ends with board determination. Final approval of all content

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of the charter application rests with the Board of Directors.

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

No:

Yes:

Submit the following evidences (Appendix A) to support the conversion of the traditional public to a charter school:

- *Statement of Support signed by the majority of the teachers and instructional support personnel currently employed at the school*
- *List of current staff receiving compensation from the traditional public school*
- *Current school enrollment*
- *Parent support of the conversion*

Outline the 3 year financial history of the proposed converted charter school in the chart below and attach the past 3 year tax returns.

<i>Financial History YR2011</i>	<i>Financial History YR2012</i>	<i>Financial History YR2013</i>
---------------------------------	---------------------------------	---------------------------------

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

No:

Yes:

What is the name of the nonprofit organization that governs this charter school? Legacy Academy of Charlotte, Inc.

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

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2016 Month September

Will this school operate on a year round schedule?

No:

Yes:

Proposed Grade Levels Served and Total Student Enrollment (

5

Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
First Year	K,01,02,03,04,05,06	700
Second Year	K,01,02,03,04,05,06,07	800
Third Year	K,01,02,03,04,05,06,07,08	900
Fourth Year	K,01,02,03,04,05,06,07,08	900
Fifth Year	K,01,02,03,04,05,06,07,08	900

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, that the initial board members and I were

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regularly involved in the development of this application, and that no part of this application is plagiarized. 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.

legacyacademy

Dr. Kenneth Benton, Chair

Signature

Title

legacyacademy

09/26/2014

Printed Name

Date

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Section I: Application Contact Information Concerns and Additional Questions	<u>Reviewer</u>	<u>Page Reference</u>
<u>What is the rationale for working with the Bridgewoods Foundation? What are their qualifications to provide support.</u>	<u>Kristen Vandawalker</u>	<u>Cover Page</u>
<u>There are currently 21 charter schools located in the LEA that this applicant is proposing. Of these 21 schools, 11 of them did not reach at least 80% of their projected enrollment for the 2014-15 school year.</u>	<u>Lisa Swinson</u>	<u>Grade Levels</u>
<u>It's unclear whether the enrollment figures are realistic. Only seventy survey respondents submitted information, which is insufficient to show that enrollment numbers are realistic.</u>	<u>Kathryn Mullen Upton</u>	<u>Grade Levels</u>
<u>What is the rationale for such a large school? What evidence supports the assumption that a large number of students in grades 3-6 can be recruited? What is the rationale for starting a new school with such a large grade span?</u>	<u>Kristen Vandawalker</u>	<u>Grade Levels</u>

<u>Reviewer</u>	<u>Score</u>
<u>Joe Maimone</u>	
<u>Carol Ann Hudgens</u>	
<u>Kathryn Mullen Upton</u>	<u>Pass</u>
<u>Eric Sanchez</u>	
<u>Helen Nance</u>	
<u>Mike McLaughlin</u>	
<u>Sherry Reeves</u>	
<u>Kristen Vandawalker</u>	<u>Fail</u>
<u>Tammi Sutton</u>	
<u>Lisa Swinson</u>	<u>Pass</u>

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II. MISSION and PURPOSES

(No more than three total pages in this section)

Mission:

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

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

The mission of Legacy Academy is to instill in students a love of learning while engaging them through academic scholarship, strength-based leadership and character development, one child at a time.

Clearly describe the mission of the proposed charter school:

Legacy is driven to achieve a vibrant learning community that goes beyond event and test driven learning. There are many roads leading to high levels of student achievement. The Academy's goal is to provide students and families with a unique educational alternative based on a rigorous content-rich classical liberal arts curriculum, high-yield research-based instructional strategies, and systematic assessment and monitoring procedures to ensure all students meet or exceed state standards.

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.*

Legacy believes that each child has individual strengths and that leadership is not unique to one group of people, nations, religion, gender or race. Leadership is in knowing ones strengths and developing them into talents and skills so as to contribute to ones community. Because of this Legacy will serve all the racial and ethnic composition in the area it is located. The following is a breakdown of the projected school demographic.

White - 86.64%

Black - 8.72%

Hispanic - 1.9%

Asian - 2.65%

Other - 0.9%

- 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).*

The 2013-2014 ADM for Mecklenburg County Public Schools in grades K - 8 was reported to be 103,903 students. Using this membership number, Legacy Academy will establish a first year enrollment of 700 students in grades K -

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6 and increase to 900 students K - 8 by year three which represents less than 1% of the total LEA ADM. In order to offer the full program of the curriculum the school should be at full capacity in the third year.

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

The need for the Legacy Academy approach to the gifts and talents of each student is foundational to all transformational strengths-based leadership education. It is based on its unique mission, vision and strategy in developing students, parents, teachers and administrators to their full potential, above and beyond immediate and necessary roles in academic success.

In the surrounding Mecklenburg County schools, while there is an academic emphasis for select students identified as gifted students according to North Carolina state law for K-12 (AIG) students, there is only one other school which is based on dedicated, proven research that all students have gifts and talents that can be systematically developed as researched and established by both The Gallup Organization and Dr. Stephen R. Covey. The Legacy Academy approach to the gifts and talents of each student is foundational to all transformational strengths-based leadership education.

While the initial programs offered by the School will have most of the best educational practices of comparable existing schools, we will add a unique foundational focus on talent, character, emotional and leadership development within The Gallup Path as pioneered by Dr. Donald O. Clifton, founder of The Gallup Organization and strengths based founder - Soar With Your Strengths (Clifton & Nelson, 1996); Now Discover Your Strengths (Buckingham, Clifton, 2001); The Gallup Path (Clifton, 2002), Building Engaged Schools (The Gallup Organization: Gordon & Crabtree, 2006) and Dr. Stephen R. Covey author of The 7 Habits of Highly Effective People (Covey 1989); The Leader in Me (Covey 2008).

4. *In the appendices (Appendix A1), 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*

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students.

6. Encourage the use of different and innovative teaching methods.

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

While Core Knowledge is successfully implemented in charter, public, and private schools across the country, not all families have access to such a program. This curriculum builds skills, knowledge and vocabulary in literature, history, and science. It also provides a detailed outline of recommended curricular content to be taught in history and geography, mathematics, science, music, and the visual arts from preschool through grade eight. This curriculum has a proven history of academic excellence and scholarship. By combining the Core Knowledge Sequence with Gallup Strength Finders and Covey Leadership Principles, Legacy Academy will provide families with a unique research-based educational program that extends beyond academic skills to develop student leaders of high character. The Academy will be a school unique within the district and will provide students with an academic culture not currently available.

A highly qualified staff and administration will work with students and parents to ensure that each student masters all core academic standards and receives a rigorous education in the core content areas of language arts, including reading, writing, speaking and listening, language, and spelling; mathematics; social studies, including history and geography; and science. Additional subjects and opportunities to be offered include art, music, physical education, character development, and technology.

Legacy Academy will serve students of all abilities and needs, including English language learners (ELLs) and exceptional student education (ESE) students. The Academy's mission will become a reality and will promote enhanced academic success for all students by:

- * Providing students with motivated, highly qualified teachers and administrators;

- * Encouraging faculty to collaborate in constructing thematic curriculum maps to ensure equity and flexibility in meeting students' educational needs while addressing benchmarks and process skills;

- * Developing and/or utilizing standards-based curricula aligned with the benchmarks of the North Carolina Standards for all applicable curricular areas;

- * Promoting the use of technology and highly effective research-based instructional strategies;

- * Integrating a program of leadership and character development that will allow students to develop the skills necessary to meet the mission of the Academy ;

- * Regularly monitoring student performance by implementing a variety of assessment tools and strategies;

- * Communicating with and involving parents in the decision-making process of the school and encouraging parent input and shared decision-making by all stakeholders within the school community; and

- * Providing teachers with effective and meaningful professional development on various instructional methodologies, curriculum, assessment, and classroom management.

Team-building and the provision of a safe, nurturing environment will be central to the operation of Legacy Academy. Students will have the

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opportunity to vary their own educational experiences based on their own choices. Students will become invested in their own learning and aware of their choices and consequences during their years at the Academy. Choice will be an important aspect of our students feeling ownership of their learning. There will be opportunities for active and genuine involvement of families within the Academy in an effort to create richer learning communities that hold all stakeholders accountable for the programs success.

Goals for the Proposed Charter School:

1. *Provide specific and measurable **goals** for the proposed school for the first 5 years of operation outlining expectations for the proposed school's operations, academics, finance, and governance. Address how often, who, and when the information will be communicated to the governing board and other stakeholders.*

Goal 1. Legacy Academy will measurably increase the level of engagement of all students each school year.

Objective 1A. Gallup has shown that higher engagement leads to better academic performance. To raise engagement, teachers will embrace and enrich each student, applying differentiated learning techniques. Each year, Legacy Academy will use Gallup's Student Engagement Survey, SE10 at the start of the school year to obtain a baseline of engagement. At the end of the year, students will take the SE10 again. School-wide, engagement shall increase at least 5% during the school year based on the SE10 results.

Goal 2. Legacy Academy will establish a culture of leadership for its students across all grade levels.

Objective 2A: Each year, 100% of staff at Legacy Academy will receive training in Covey's 8 Habits of Highly Effective People and Covey's Leader in Me during professional development days prior to school opening.

Objective 2B: By the end of each school year, 100% of students will demonstrate 80% of Stephen Covey's 8 Habits of Highly Effective People in their lives.

Goal 3. Students at Legacy Academy will achieve academic excellence of the North Carolina required curriculum.

Objective 3A: At the end of the 2016-2017 school year, 90% of Legacy students will score 90% or higher on the Core Knowledge assessments.

Objective 3B: At the end of 2016-2017 school year, 90% of Legacy Academy students will score Level III or higher on the North Carolina End of Grade (EOG) achievement assessments in Reading.

Objective 3C: At the end of the 2016-2017 school year, 90% of Legacy Academy students will score Level III or higher on the North Carolina End of Grade (EOG) achievement assessments in Math.

Goal 4. Students at Legacy Academy will be participating and contributing members of the community.

Objective 4A. The number of students participating in school, community, and civic activities will increase each year, as will the number of service activities overall for the school.

Objective 4B At the end of the 2016-2017 school year, 100% of fourth grade

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students will present for review, a Service Portfolio, supporting community service activities engaged in by each student.

Objective 4C At the end of the 2017-2018 school, 100% of all students in grades three four and five will present for review a Service Portfolio, supporting community service activities engaged in by each student.

Goal 5. Legacy Academy will increase each student's ability to successfully accomplish Leadership Opportunities at school and in the Community.

Objective 5A. By the end of each school year, 100% of all students will have successfully completed leadership activities identified by the leadership community developed within the school.

In order to ensure the mission of the school is achieved in both leadership and academic scholarship, Balance Scorecard will be used to monitor the performance of Legacy Academy. This scorecard will be reviewed quarterly by the board and other stakeholders to ensure that the school is true to its purposes. According to the Balance Scorecard website, "The Balanced Scorecard is a strategic planning and management system that is used extensively in business and industry, government, and nonprofit organizations worldwide to align business activities to the vision and strategy of the organization, improve internal and external communications, and monitor organization performance against strategic goals. It was originated by Drs. Robert Kaplan (Harvard Business School) and David Norton as a performance measurement framework that added strategic non-financial performance measures to traditional financial metrics to give managers and executives a more 'balanced' view of organizational performance." See Appendix U for more details.

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

To facilitate the alignment of responsibility and accountability to enhance academic success and financial efficiency, Legacy Academy will develop a School Improvement Plan (SIP). The SIP is intended to be the primary tool used by school personnel and its stakeholders to review data, set goals, create an action plan and monitor progress vis a vis the mission of the school. The SIP will be a "living document"; continually updated, refined and used to guide the schools work throughout the year. The SIP will include: current school status, expected improvement, goals, and action plan for improvement, and will be developed in a coordinated, integrated manner. Additionally, the plan will include a professional development plan and budget to support goals. Financial controls, including an annual audit and regular Board review of financial statements, will be employed to safeguard finances and promote financial efficiency.

Upon accessing data from the State's Accountability Reports, the school will measure its own progress in meeting the needs of its student population. The SIP will be used as a method of accountability. This plan will detail specific Annual Measureable Objectives (AMOs) and respective strategies to achieve academic success, and ensure fiscal efficiency (including discussion by various stakeholders to make budget projections and conduct evaluation of all programming efforts, through the SIP document planning process). As a means for aligning responsibility for students academic success to financial efficiency, the academic programs which are utilized at the Academy will be reevaluated, after an appropriate implementation timeframe, and prior to any contract renewals, the schools administration will discuss with the governing board their findings as to whether or not there exists a positive

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yield of student achievement for the respective investment.

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Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
<p>What is a "high yield" instructional strategy? Is this meant to be a classical school? Significant grammar/punctuation/typo issues.</p>	Kristen Vandawalker	Mission Stat
<p>The mission is vague and the description of the mission seems to be disconnected from the mission.</p>	Lisa Swinson	Mission Stat
<p>The applicant provided survey information for a small sample of families, 81, for an area with over 46,000 people. The evidence that was provided was not a clear rationale for selecting the location and targeted student population. The applicant provided census information for the area, which was not compelling evidence that another charter is needed for the area. The education plan eludes to the school providing an academic emphasis for AIG students. This is the first time that this is mentioned and does not align with the targeted population description provided or the mission statement. The targeted population is all students in the area.</p>	Lisa Swinson	Educational
<p>The targeted student population is not clear. The narrative in this section mentions AIG students, and notes there is only one other area school dedicated to this population. The mission does not discuss gifted, nor does the application specifically state that Legacy Academy is for gifted students.</p> <p>As mentioned previously, the small sample size from the survey is insufficient to demonstrate need. Additionally, if the proposed school is planning to focus on gifted students, no evidence of educational need for this population was present in Appendix A1.</p>	Kathryn Mullen Upton	Educational
<p>No rationale for targeting these students is provided. Are these students actually in need of another option? What research supports use of Gallup's Strengths Based Leadership at the elementary school level? has this been successful in other schools? Is the argument that other than programs for AIG identified students, the whole LEA is weak and does not focus on academics? What are the "comparable existing schools?" Appendix A does not demonstrated academic need or sufficient demand for growth. Only ~100 responses were recieved. they do not indicate a significant base of interested families to meet the projected 700 students in year 1. the survey was distributed to only 181 families, too small a sample size to determine actual community support.</p>	Kristen Vandawalker	Educational
<p>Are there no schools using CK sequence in the area? Will parents understand the benefits of the Callup and Covey principles? How will children be assessed on the Gallup scales, this test is not designed for children. it is unclear how the bulleted items differentiate this school. Will the school purchase curricular products or develop their own? this is a critical distinction. how does technology fit into the mission of the school? How will students make choices about their own experience?</p>	Kristen Vandawalker	Purposes of
<p>While the application states that the proposed school will provide parents and students with expanded choices and different educational opportunities than those that currently exist, the narrative contains almost little detail to support that assertion. The application states that it will offer Core Knowledge in combination with Gallup Strength Finders and Covey Leadership Principles; however, there is no detail as to how these programs (1) will be used together, or (2) will be effective when used together.</p> <p>Additionally, many of the general information contained in the bullet points included in this section are often available within most public school systems.</p>	Kathryn Mullen Upton	Purposes of

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<p>The narrative does not address improving student outcomes.</p>		
<p>It appears that the school will use two systems to monitor/measure success: Balanced Scorecard, and the School Improvement Plan.</p> <p>Two evaluation systems could be problematic; please see questions below.</p> <p>Questions: how do these systems work together? Do they have measures that overlap and/or potentially contradict each other? Why have two evaluation systems?</p> <p>Additionally, there do not appear to be any student growth goals; rather, just end-of-grade goals. If the focus is engagement, one would expect to see a growth measure as an indicator of engagement. And, if the school is focused on gifted, growth goals are quite important to demonstrating progress and showing improved student outcomes.</p>	<p>Kathryn Mullen Upton</p>	<p>Goals for th</p>
<p>The applicant did not provide baseline academic or community data, in this section or previous sections, to establish whether these goals are achievable. The board will use academic data from the State. This will not be available until the end of the school year.</p>	<p>Lisa Swinson</p>	<p>Goals for th</p>
<p>Goals are not presented in SMART terms. Overall, the goals lack rigor and purpose and are not measurable;</p> <p>How will "engagement" be measured? Why will it grow 5% annually from BOY to EOY, this seems like a low goal? shouldn't 100% of students be "engaged"?</p> <p>Completing required PD is not a goal.</p> <p>How many "Habits" are there? 7 or 8?</p> <p>What is the logic for the 90% goals? why are there no goals for out years? Why are no nationally normed assessments included? is it Level III or Level 111?</p> <p>Why does goal four address only three grade levels?</p> <p>How does community service fit with the rest of the program?</p> <p>Not clear what goal 5 is trying to say.</p> <p>Do other schools use the Balanced Scorecard? is this a vendor product or just a set of business principles? How and what does it measure? What are the inputs and outputs?</p> <p>Who develops and monitors the SIP? What are the inputs and outputs? who is held accountable for progress?</p> <p>What is the basis/threshold for "a positive yield of student achievement for the respective investment?"</p>	<p>Kristen Vandawalker</p>	<p>Goals for th</p>

Reviewer	Score
Joe Maimone	
Carol Ann Hudgens	
Kathryn Mullen Upton	Fail
Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Sherry Reeves	
Kristen Vandawalker	Fail
Tammi Sutton	
Lisa Swinson	Fail

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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.

It is the commitment of Legacy Academy to uphold high expectations for all, to create safe and caring learning environments, and to maintain a culture where parents, teachers, students, governing board and community stakeholders work as a cohesive team. It is this commitment aligned with the vision to set high standards in developing lifelong learners that will yield success for all. The motivation and dedication of each stakeholder to not just maintain the Academy's vision, but to continuously strive to reach beyond it will result in a school that is characterized by successful students, innovative educators, exceptional administrators, committed board members and engaged parents.

The Academy will offer students a rigorous education grounded in the classical liberal arts tradition and focused on literacy. The Academy's educational program is built upon the success of many classical schools that have implemented a similar educational approach and have demonstrated strong student achievement year after year. Schools that have embraced a classical program draw from research-proven curricula, supplement these with internally developed materials, and work strategically to ensure that all curriculum and assessments are thoroughly aligned with state standards. The classical approach to education focuses on providing children with the lifelong educational tools to learn and think for themselves. The school's foundation will be the implementation of our carefully selected curriculum, specialized instructional strategies, and core beliefs, all of which are supported by the practice of high performing classical schools that inspired the design of Legacy Academy.

The Academy will use the research-based, teacher-tested Core Knowledge curriculum that engages students in diverse historical, scientific, and cultural content. The curriculum employs classical curricular and pedagogical approaches that are centered heavily on the core academic subject areas of language arts, mathematics, science, history, and a specialization in art and music. The curriculum is based on the work of E.D. Hirsch, Jr. He has explained his research and ideas in several widely acclaimed books, including *Schools We Need and Why We Don't Have Them*, *The Knowledge Deficit: Closing the Shocking Education Gap for American Children*, and *The Making of Americans: Democracy and Our Schools*. Core Knowledge will give students a basic, foundational body of understanding, attitude, and knowledge for living in a global community, which acknowledges that learning experiences may vary according to individual needs.

Through Core Knowledge, students will have the opportunity to develop intellectual curiosity, critical thinking skills, ethical problem-solving abilities, healthy personal habits, and aesthetic appreciation during their

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school years in such a manner that will continue throughout their lifetime. The Core Knowledge sequence is both coherent and cumulative. It is predicated on the realization that what children are able to learn at any given moment depends on what they already know - and, equally important, that what they know is a function of previous experience and teaching. Core Knowledge is a great equalizer for those students who have not had exposure to the arts, travel, museums or theaters, and didn't necessarily come from literature rich homes. Core Knowledge will provide this background knowledge for them.

Although current events and technology are constantly changing, there is a body of lasting knowledge and skills that form the core of a strong kindergarten grade eight curriculum. Explicit identification of what children should learn at each grade level ensures a coherent approach to building knowledge across all grade levels. Every child should learn the fundamentals of science, basic principles of government, important events in world history, essential elements of mathematics, widely acknowledged masterpieces of art and music from around the world.

Curriculum and Instructional Design:

Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure for each grade span (i.e. elementary, middle, high) the school would ultimately serve.

Our educational program is focused on maximizing student achievement. Class sizes start at approximately 19 students in kindergarten and grow to approximately 25 students in the upper grades. Legacy has provided Teacher Assistants for every Kindergarten class, two Teacher Assistants to be shared among the four first grade classrooms. One Teacher Assistant will float between the four second grade classrooms.

A significant influence in the Legacy educational model is based on the consistently strong success of Muriel Summers and her staff at A. B. Combs Elementary in Raleigh, N.C. in applying the Covey 7 Habits. By recognizing that each student possesses unique gifts and talents, and building on students' strengths rather than their weaknesses, Muriel and the other faculty guide students at A.B. Combs to continually achieve high levels of academic performance year after year. "Factual knowledge alone is thus no longer the great differentiator between those who succeed and those who do not. Instead the individuals who are emerging as the new winners - the new thrivers of the twenty-first century are those who possess above average creativity, strong analytical skills, a knack for foresight, and, surprise, good people skills. If we are putting all of our efforts on the almighty test scores alone, I am quite afraid that we are going to create a generation of children who know how to do nothing well but take a test well. " (Muriel Summers, Principal A. B. Combs Elementary, *The Leader in Me* (Covey, 2008))

Legacy Academy's learning environment will include: 1) use of inquiry-based teaching approaches, 2) small learning community environment (small school size), 3) smaller class size, 4) extended time for teacher planning and professional development, 5) Response-to-Intervention (RTI), 6) daily morning class connection time to integrate social and emotional learning with academic learning, 7) frequent physical education 8) adequate time for recess, 9) opportunities for parental involvement and 10) integration into the curriculum of multi-age approaches toward learning.

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Provide a synopsis of the planned curriculum, including:

1. *One sample curriculum outline (in graph form) in the Appendices (Appendix B) for one core subject (specific to the school's purpose) for each grade span (i.e. elementary, middle, high) the school would ultimately serve.*
2. *If you are proposing a high school, as Appendix B2, provide a visual disseminating what courses (core content and electives) will be offered at the charter high school to ensure students meet the proposed charter school's graduation requirements. 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.*

Since leaders are not unique to one industry or subject, a curriculum with breadth and depth is needed. Core Knowledge was selected because it does both of these. It is unique in that it provides sequential knowledge year over year so that knowledge can build upon prior knowledge. The Sequence represents an effort to describe and state the specific core of shared knowledge that all children should learn in U.S. schools, and that speakers and writers assume their audience knows. Moreover, because the Sequence offers a coherent plan that builds year by year, it helps prevent the many repetitions and gaps in instruction that often result from vague curricular guidelines. The Core Knowledge Sequence is not meant to outline the whole of a schools curriculum, but rather to provide a coherently organized plan for content and skills instruction, while remaining flexible enough to not exclude locally determined or other required content and skills.

Legacy Academys definition of leadership is unique in that all students have strengths and should be developed. Our target student population is not limited to one group but desires a diversity of students. The Core Knowledge Sequence is a detailed outline of specific content and skills to be taught in language arts, history, geography, mathematics, science, and the fine arts. As the core of a schools curriculum, it is intended to provide a coherent, content specific foundation of learning, while allowing flexibility to meet local needs.

Legacy Academy will follow the North Carolina Standard Course of Study and the Common Core State Standards. Required federal programs will also be implemented. All state mandated testing will be given. Rubrics and other alternative assessment measures will be utilized in performance-based accountability systems. Such rubrics will evaluate a broad view of student learning, as opposed to rule-based grading policies.

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 for each grade span (i.e. elementary, middle, high) the school would ultimately serve.*

Legacy will expect teachers to master curriculum plans, referred to as MAPs, that align with grade specific content and the common core state standards. MAPPING strategies are based on those of the Core Knowledge philosophies including content specific, coherent, cumulative, and context-rich lessons that help students remember, add-to, and challenge existing knowledge for a more comprehensive education. In addition teachers will be expected to master six instructional strategies for subject areas: integrative units,

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small group activities, project-based learning, classroom workshop, authentic experience, and reflective assessment. In addition Legacy will provide instructional support by having special instructors to help children learn with reading comprehension.

These instructional research based strategies along with the Core Knowledge curriculum will result in increased academic achievement for the targeted student population even more effectively because the Sequence builds upon prior knowledge. This method of teaching has been shown to increase student success and increase cognitive abilities. The Core Knowledge sequence states, "If you have a rich base of background knowledge, it's easier to learn more. And it's much harder to read with comprehension, solve problems and think critically if you don't." In addition, "The Sequence is not a list of facts, events, and dates to be memorized. It is a guide to content from grade to grade, designed to encourage steady academic growth and progress as children construct their knowledge and develop literacy and critical thinking skills year after year." <http://www.coreknowledge.org/sequence>

Core Knowledge through cognitive science findings helps create a link between reading comprehension and background knowledge. Core Knowledge is based on the presumption that, "Students will comprehend, evaluate, and respond to works of literature and other kinds of writing which reflect their own cultures and developing viewpoints as well as those of others, using prior knowledge to extend reading ability and comprehension." Core Knowledge Sequence.

According to University of Virginia cognitive scientist Daniel T. Willingham. "Most of us think about reading in a way that is fundamentally incorrect. We think of it as transferable, meaning that once you acquire the ability to read, you can read anything. But being able to decode letter strings fluently is only half of reading. In order to understand what you're reading, you need to know something about the subject matter. And that doesn't just mean that you need to know the vocabulary; you need to have the right knowledge of the world," he says.

"General reading comprehension ability is much more than comprehension strategies," wrote Core Knowledge founder E.D. Hirsch, Jr. in his 2006 book *The Knowledge Deficit*; "it requires a definite range of general knowledge." The following is from Hirsch.

A grasp of Core Knowledge is necessary in order to understand better what is being read. Reading is often compared to as a "two-lock box". In order to open a lock the first key is decoding. The second key is language, which requires general knowledge that helps give greater meaning and context to what is read.

Traditional language arts instruction has typically paid little attention to listening and speaking. This failure to focus on the development of oral language in language arts instruction is a serious oversight. The ability to read and write written language, is highly correlated with students oral language proficiency, and the ability to understand a text read aloud is a prerequisite for making sense of the same text in printed form. It is essential that children build listening and speaking competency while also developing reading and writing skills.

5. *Explain how the proposed instructional plan and graduation requirements will ensure student readiness to transition from grade to grade and to the next grade span upon program completion.*

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The Academy's primary goal at the elementary level is to produce middle school-ready students, equipped with solid literary and mathematical skills as well as history, geography and science knowledge based on the mastery of subject content. Improving graduation rates, reducing dropout rates and increasing the rate at which graduates choose to enroll in higher education all rest on the foundation of effective schooling long before those children walk through the doors of the high school program. The opportunity to be challenged, supported and systematically guided toward graduation is part of the unique mission of this Academy and the key rationale for proposing an integrated K-8 educational opportunity.

The purpose in education is to develop conceptual knowledge, techniques, procedures, and algorithmic problem solving using Verbal/Linguistic and Logical/Mathematical intelligences. The learner requires scaffolding to develop schema and adopt knowledge from both people and the environment. The educators' role is pedagogical in that the instructor must develop conceptual knowledge by managing the content of learning activities. This theory relates to early stages of learning where the learner solves well defined problems through a series of three stages. These stages, referred to as the Trivium when applied to classical education, are described below.

The Trivium, or "three roads," speaks to the structure of every subject and discipline. The Trivium model describes three stages; grammar, logic, and rhetoric, which follow the developmental growth of children from their ability to memorize information to giving a name to everything in their world to becoming argumentative, looking at the big picture, and expressing thoughts and opinions. "Grammar," the first stage, is defined as the foundation of a subject or the collection of its parts and the mechanics of how they work. In the past, elementary schools were referred to as "grammar" schools; they provided students a foundation in the "basics." The rationale for the grammar stage is there must be an understanding of the facts before students can move to the next stage. During the grammar stage, specific literacy skills such as explicit phonics, grammar, and rules of spelling are intensively taught. Science is based on an understanding of key concepts as well as learning to use the scientific method as a grammar for scientific thinking.

The second stage, "logic," is characterized as the understanding of the parts, their relationship to each other, and the organization of the parts into the whole. In subsequent years, students revisit the data they have learned and begin to develop analytical skills by connecting themes, ideas and causes. Students at this age want to look at the big picture; they want to know "why?" As they continue to learn facts, they have the intellectual capacity to question those facts. The primary pedagogical style in this stage is logic or dialectic. In this method of instruction, answers are arrived at by the exchange of logical arguments. There is a focus on higher-level thinking and communication skills. This method takes students to the highest of thinking examination of pertinent primary source documents. During this stage, and in the next stage known as "rhetoric," students read great works in the American tradition to better learn about and understand the great ideas, texts and events of Western Civilization.

The last stage, "rhetoric," is the ability to apply the foundational knowledge and logical understanding of a subject, and to creatively solve problems and express opinions. Students learn to read with sophistication and judgment, to attend to details, and to track nuances in both style and argument. They learn to take their time and work carefully and conscientiously. By doing so, students develop habits of mind that are an essential life skill. They are prepared to analyze arguments, present new

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ideas, and express their ideas.

6. *If you are proposing a high school, describe how the proposed charter school will meet the Future-Ready Core requirements. Provide details on how the students will earn credit hours and how grade-point averages will be calculated?*
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.*

The calendar is designed to give students and teachers not only sufficient time learning how to be a leader but also time to spend away from their studies for greater reflection. It is believed that great leaders need to have balance in their lives by experiencing more than just what is in the classroom so extended summer and winter breaks are scheduled. Some holidays were selected to commemorate and help students recognize a few of the great leaders in the world.

In addition, based on the Gallup Path engaged schools begin with engaged teachers. The calendar allows for sufficient time for not only the training of teachers, but also allowing enough work days and holidays to accommodate for Coveys 7th Habit of sharpening the saw.

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.*

Legacy Academy will utilize a Response to Intervention (RTI) approach to address learning and behavioral problems. We will provide high quality instruction and intervention matched to student need, monitor progress frequently to make decisions about change in instruction or goals, and apply child response data to important educational decisions, such as need for remediation.

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) Methods for identifying ELL students.

In the first year of operation, students will be screened by a trained educator, via a Dynamic Indicators of Basic Early Literacy Skills (DIBELS) measure for both reading and literacy as a snapshot to determine surface discrepancies of fundamental content skills. The DIBELS are a set of standardized, individually administered measures of early literacy development. They are designed to be short (one minute) fluency measures used to regularly monitor the development of pre-reading and early reading skills. The measures were developed to assess student development of phonological awareness, alphabetic understanding, and fluency with the code.

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The DIBELS measure will continue to be administered at the end of each nine week period to only students identified as needing monitoring via the Response to Intervention (RTI) model.

(After the first year of operation DIBELS will be applied to K-3 students and other approaches will be used for assessing the individual needs of older students.)

2) Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for these students.

Our holistic approach to helping ELL students involves implementing ELL curricula that includes an emphasis on high-level or higher order thinking and the mental processes of application, analysis, synthesis, and order evaluation. ELLs need these skills to pass high stakes tests, compete in a high-stakes global job market and initiate social change.

Strategies that may be put in place to assist the ELL students are:

- * Provide English language learners access to English speaking peers
- * Ensure teachers do not force production of English before students are ready
- * Utilize various sources of literature to inspire learning and literacy
- * Respect the student's primary language and culture
- * Ensure that teachers utilize a variety of student-centered methodologies with English language learners
- * Encourage the use of content-based sheltered English methodologies in the classroom
- * Utilize a balanced approach to literacy instruction

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

While Legacy Academy acknowledges it is important to keep realistic timelines in mind when considering how long ELL support may be needed, we believe there is evidence that the process can be accelerated to some degree if adequate support is provided and innovative methodologies are used. Additional resources may be allotted to ELL students. Student progress is monitored by the Intervention and Advancement Team, IAT. Evaluations and skill level will be considered and discussed by IAT at regularly scheduled meetings instead of biweekly and monthly meetings and appropriate action will be determined.

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

1) Specific instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.

Legacy Academy recognizes that gifted students have special educational

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needs and hence, require specialized programming that goes beyond that ordinarily provided by regular classroom/school programs. In response to the needs of gifted students, the School will establish and maintain a school culture that values, promotes and recognizes excellence; stimulates students to pursue higher level goals and aspirations; provides learning activities at an appropriate level and pace; provides a variety of learning activities that supplement or extend requirements of the curriculum; and fosters on-going professional development to enable school staff to enhance their ability to meet the needs of gifted students.

Legacy Academy may employ a number of different administrative and organizational strategies in the delivery of its program for gifted students. These strategies include cross-grade or multi-age grouping, course and/or grade advancement, independent study, and seminars and tutorials.

2) Plans for monitoring and evaluating the progress and success of intellectually gifted students.

Intellectually gifted students will be monitored and evaluated throughout the year and advancement may continue throughout the school year depending on the students response to the intervention. A system of graphing concrete data for visual analysis will be provided by the classroom teacher to the parent and stakeholders involved in the interests of educating the individual learner. Curriculum may be further altered to match the skills and learning of the intellectually gifted students.

Exceptional Children

*The public charter school cannot deny admission to any child eligible for special education services as identified under the federal legislation Individuals with Disabilities Education Improvement Act (IDEA), 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) 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.

All students identified as qualifying for services under IDEA or 504 will be

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referred by the parent or teacher to the Academic Director. A team composed of the student's teachers, parent/guardians, Academic Director and the Exceptional Children's Coordinator (IEP / 504 Team) will convene to discuss the educational program designed to meet the individual student's needs. Methods of evaluation of current skill levels may include prior test results, grades, portfolio assessments, standardized tests, observations and teacher recommendations. These possible variances in performance are not limited to academic area, but may include social or emotional factors. Corrective action plans, including intervention by the school staff will be developed in cooperation with the parents.

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.

Legacy Academy will implement comprehensive K-8 universal screening measures to be determined during the continued planning phase. We will use the NWEA Measures of Academic Progress (MAP) tool. The assessment program will include benchmark assessments (3 times per year) as well as progress monitoring assessments (conducted either weekly or every 3 weeks, depending on student risk level). The school will gather formative assessment data and the faculty will collaborate to make data-based instructional decisions via the Intervention Advancement Team, IAT that meets bi-weekly or monthly.

This data will be a secondary source of information displaying the progress of the individual student receiving research based interventions from the IAT. The IAT will include, at a minimum, parents, the regular classroom teachers, the Managing Director or the Academic Director, and a representative special education teacher.

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

First we will determine all students who have been identified with disabilities and who have 504 Accommodation plans. Parents will be asked to sign a release form which will permit Legacy Academy staff to request confidential and academic records from the student's school of transfer.

b) Record Confidentiality (on site)

All student files are considered confidential. Student records, including IEPs, intervention methods, evaluations, etc. will be maintained in the main office of Legacy (including filed hard copies and digital copies maintained through secured computers) and only be available to members of the IEP team as identified on IEP forms and others as specified only under the Family Education Rights and Privacy Act.

c) Record Compliance (on site)

The records of students identified as eligible for services through IDEA or 504 will follow federal mandates. These records become a part of the students permanent file that is maintained in a highly secure and fire proof area. A record including date, time, name of person and reason, will be maintained of all persons who access individual student records. All records will be maintained as required under the Family Education Rights and Privacy Act (FERPA).

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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) Describe the educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities.

As prescribed by Federal and associated State laws, an Individual Educational Plan (IEP) will be developed for each special education student. IDEA requires that students by the age of 14 be provided with an annual meeting for the purpose of discussing possible transition services. The school shall invite the parent and a student of any age with a disability to attend the IEP meeting if the purpose of the IEP meeting will be the consideration of transition services. This may include discussion concerning what the student wants for his or her future, what needs or challenges are perceived as barriers to reaching student goals, and what accommodations and supports will aid the students efforts. Annual goals, short term objectives, statement of interagency responsibilities, statement of participation in state and district-wide tests and a list of special education and related services to be provided will be a part of the IEP. The IEP / 504 Team for the student will determine if services outside the school are required for a student.

Students at Legacy Academy with active Individualized Education Plans (IEPs) will automatically be assigned to Tier 2 and Tier 3 interventions.

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).

If such services are deemed appropriate, the IEP / 504 Team and the school administration will make arrangements for additional, supportive services to be secured. Some of these possible services to be secured may include speech, assistive technology, transition services, mental health, and vocational rehabilitation.

3) Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents and relevant staff.

The school will have appropriately trained and licensed teachers to adhere to Federal and State guidelines to make sure all of the IEP services are implemented. It will also participate in the needed compliance reporting and maintenance of data systems. Legacy will have a director for exceptional children that will oversee a team of IEP staff or specialists. The IEP staff will coordinate with stakeholders e.g. parents, students, teachers, administrators regarding exceptional children and ensuring requirements are communicated and met.

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Exceptional children teachers have the immediate responsibility for servicing students needs in class, while still coordinating with the regular teacher to help facilitate exceptional children in activities, lessons and instruction.

Each IEP Team will include a parent, special education teacher, a classroom education teacher, an appropriate representative from the LEA and a qualified person that can analyze evaluations and determine eligibility. Placement decisions will be reviewed annually.

Parents may examine all records of their children regarding the rights of the students and parents according to Federal and State Law. Parents can request a copy of the evaluation report and other documents used to determine eligibility and assessments.

4) Describe the proposed plan for providing related services.

IEP mandated services will be obtained by Legacy Academy through qualified local providers and such mainstream services will be paid for (if any required) by Legacy Academy. Every effort will be made to maintain service providers for students already receiving services. For newly identified students, a review of providers will be conducted to determine the best options for the student. Staff training will be provided and parent involvement will be included throughout the process.

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. Describe the student performance standards for the school as a whole.

Legacy Academy student performance standards will be based on the established school achievement goals as measured by End of Grade tests, school wide benchmark assessments and the individual progress of each student.

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.

Legacy Academy will use the established NC End of Grade tests as well as results derived from Dibels and NWEA's MAP, teacher observation and classroom performance. Data will be used to determine student achievement. Scheduled data review sessions will allow teacher collaboration to determine

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instructional supplementation or enrichment for individual students. Teachers will work within grade levels to ensure that curriculum needs are met for all levels of learners. Teachers will work across grade levels to determine previous grade level deficiencies and future curriculum needs.

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.

The Legacy Academy Parent Handbook will outline the promotion standards for each grade level. Promotion standards are in accord with the NC Standard Course of Study

Kindergarten students are required to achieve a minimum of Satisfactory in reading and math as determined by end of year performance and a portfolio of completed student work.

Students in grades one to five will be promoted with a grade of "D" or higher in Science, Math, Language Arts/English, History and Geography and a passing score on any required NC End of Grade Test including third grade reading and math and the fifth grade science test.

For grades six to eight, students will be promoted with a grade of "D" or higher in Science, Math, Language Arts/English, History and Geography and a passing score on the NC End of Grade Tests in reading and math and the eighth grade state science assessment. Eighth graders not meeting passing scores on the End of Grade tests in Reading and Mathematics will be considered for retention.

Parents will receive progress reports and report cards four times a year. Progress reports will be issued at the mid-point of each grading period to update parents on the student's progress through the grading period. Report cards will be issued at the end of each grading period, providing a summation of the student's work. School communication folders will be sent home weekly. Parents will also have access to the Parent Portal through Powerschool.

4. Provide the public charter schools 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.

Legacy Academy will establish a rigorous instructional program with appropriately established assessments throughout all grade levels to ensure students have met the standards for promotion to the next grade. Students will be evaluated using the standards for each grade as noted. Students exiting the eighth grade will be expected to meet the minimum standards for promotion to high school and ultimately ensuring the students are on track to graduate from the high school of choice. All eighth grade students will be assessed using the NC End of Grade tests for reading and math as well as the eighth grade science assessment. Promotion and exit standards from the school will meet the standards established by the state and local LEA. For At-Risk populations, End of Grade Reading and Math scores along with a review of information provided by the IEP Team will be used for promotion decisions

Student Conduct:

Legacy Academy of Charlotte - The mission of Legacy Academy is to instill in students a love of learning while engaging them through academic scholarship, strength-based leadership and character development, one child at a time.

*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.*

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.

Good leaders are created through respect for self and others. To help all students develop respect and strong leadership abilities, Legacy Academy will require good manners, appreciation for property, honesty, punctuality, reliability, and responsibility from all students, staff, parents, and community participants. We fully expect the focus on ethics and decision-making to lead to an environment where good character is important to all. Legacy's intention is to praise rather than to reprimand whenever possible. Nonetheless, if redirection is necessary due to disruptions to others learning experiences, offense guidelines will be enforced.

In the event that a student needs specific guidelines, certain offenses are stated below which would include, but are not limited to, these suggestions. Legacy Academy has adopted a description of violations defined as Class I, II, or, III offenses as specifically detailed within the Student Parent Handbook. SEE Appendix D. Students who exhibit any Class I offenses may receive a 1 day in-school suspension. A Class II violation will result in temporary suspension from Legacy for up to 5 days. To re-enter the school, the student must show evidence that indicates that he or she is now focused on academic, motivational, and behavioral aspects of his or her life.

Day-to-day application of the discipline code will be the responsibility of the classroom teacher, the Grade Leader, and the Managing Director. Student disciplinary issues, which may be the result of an existing student condition, will be evaluated on a case-by-case basis. A procedure for appeal will be available for consideration by the Managing Director and the Legacy Board. All Class III offenses will be automatically appealed.

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Section III: Education Plan Concerns and Additional Questions		
<p>The narrative indicates that the school will use Core Knowledge, but does not discuss the previously mentioned Gallup and Covey components, which appear integral to the proposed design.</p> <p>There is mention of "research-based, teacher-tested Core Knowledge ..." yet there is not evidence included that the proposed approach will lead to improved student performance for the targeted population.</p>	Kathryn Mullen Upton	Instructiona
<p>Why are there no apostrophes in the document? What schools using classical curriculum and models did the Legacy team visit? What curricular products will be used? how does the classical model integrate with the Gallup/Covey model? If this is a classical school, why are the elements of the trivium not discussed and why is there no vision for how the other model elements will evolve as students progress through grades? What are the "specialized instructional strategies and core beliefs?" Core Knowledge is a sequence of topics. what curriculum will be used? what schools are using CK and classical structure? What is the rationale for the assumption that students will not have access to resources/literature? What is the "specialization in music and art?" What does this statement mean: "Every child should learn the fundamentals of science, basic principles of government, important events in world history, essential elements of mathematics, widely acknowledged masterpieces of art and music from around the world?" By eighth grade, shouldn't student be well past "fundamentals" and "basics"?</p>	Kristen Vandawalker	Instructiona
<p>Applicant does not provide a clear and coherent description of the instructional program in this section. Instructional methods are not described, rather components of Core Knowledge are presented. Further, there is no information regarding how this program will lead to improved student performance for the targeted population. The application only stated that other schools have had success.</p>	Lisa Swinson	Instructiona
<p>There is not much detail regarding the basic learning environment other than class size and teacher aides for K-2.</p> <p>Class sizes start at 19 in kindergarten and grow to 25 in the upper grades; however, there is no breakout provided. Additionally, this information is contrary to information contained in paragraph 3 of this section, which states that small school and small class sizes will be part of the learning environment. (School size is 700 initially, 900 at capacity.)</p> <p>There is no mention of Gallup/Covey in the narrative or in Appendix B.</p> <p>The academic calendar is very general and contains teacher workdays and holidays only (e.g., no assessment, no specific plans for teacher workdays, etc). The calendar does not address instructional days or hours.</p>	Kathryn Mullen Upton	Curriculum a
<p>Appendix B is a copy of the Scope and Sequence of Core Knowledge. Will this be the only instructional tool used? Instead of describing the primary instructional strategies and learning environment the applicants have provided research information about the Core Knowledge program. It appears that this section was take directly from the Core Knowledge handbook/basal. Calendar provides a Teacher Workday approximately one day per month. Narrative for calendar is vague.</p>	Lisa Swinson	Curriculum a
<p>Where will the extra six students per classroom in grade one come from in years two and beyond? What types of support do the TAs provide? is AB Combs a classical school? Do they use Core Knowledge? Are the student populations similar? What is the success of the school mentioned here? What are the measures and the rationale for this assertion? How large are other area schools? What is the basis for calling a school of 900 students "small?"</p>	Kristen Vandawalker	Curriculum a

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<p>How large are classrooms in other area schools? what is the basis for asserting that these class sizes are small? Generally, class size makes little difference until you dip below a 17:1 ratio.</p> <p>How do the 10 elements named work together? this seems like a kitchen sink approach. No actual curriculum is discussed, nor is development of standards and CK-aligned curricula.</p> <p>Instructional strategies are not discussed. Curriculum maps are tools.</p> <p>What is the basis for asserting that children in other area schools have a deficit of speaking and listening instruction?</p> <p>Why does the school seek to create "middle school ready students" when they will serve MS grades?</p> <p>Providing a CK-developed document is insufficient and shows lack of understanding and ability to develop curriculum maps. this document does not address skills and standards appropriately.</p> <p>What is the rationale for providing only four days of teacher induction? what is to be accomplished during the teacher workdays? are these aligned with testing or report card days?</p>		
<p>There is not a sound plan for identification, prevention and intervention for all students; rather, there is a very general statement that the school will use Response to Intervention (RTI). There is no detail on how, specifically, RTI will be implemented in the proposed school.</p> <p>Regarding ELL students, the school will use DIBELS for students in K-6 to identify those that may qualify as ELL in year one of operation. The narrative then states that other methods will be used with older students in subsequent years, but does not those methods. There was no mention of strategies other than DIBELS (e.g., surveys).</p> <p>The plan does not detail specific instructional programs that the school will use with ELL students. The plan does not demonstrate capacity to meet state and federal requirements for ELLs.</p>	Kathryn Mullen Upton	Special Prog
<p>This section is wholly undeveloped. No understanding of RTI is demonstrated. No understanding of the needs of ELLs or LEPs is demonstrated. Why are WIDA an a home-language survey not discussed?</p> <p>In year one, All students up to grade 6 will be scteened using DIBELS? How will DIBELS results identify ELLs? Will students not under RtI monitoring not be given a DIBELS assessment at EOY?</p> <p>No ELL curricula or specific plans are included. The applicant demonstrates insufficient understanding of the needs of ELLs to fully meet FAPE requirements and fulfill public school obligations.</p> <p>What is the IAT, and who are its members? what is "regularly sxcheduled, if not 1-2 times per month?</p> <p>No clear plan for addressing the needs or differentiating for AIG students is presented.</p> <p>What is the rationale for assuming that multi-age classes or grade skipping will be possible.</p>	Kristen Vandawalker	Special Prog
<p>Applicants did not included State and federal mandates for serving ELL.</p>	Lisa Swinson	Special Prog
<p>Applicant does not demonstrate an understand of state and federal requirements regarding EC: Students who are enrolled and have previously been identified and found eligible for special education services do not need to be referred. Child Find mandate is not accurately described for students who may be eligible.</p>	Lisa Swinson	Exceptional
<p>How is the IEP/504 team different from the IAT team?</p> <p>How will MAP identify students in need of SpEd services?</p> <p>This is the first time MAP is mentioned, which indicates lack of understanding of the purpose and value of this tool.</p> <p>It does not appear that the applicant understands or can uphold the responsibilities of a public school meeting FAPE requirements.</p>	Kristen Vandawalker	Exceptional
<p>Questions for interview: please describe the security procedures for the electronic records of students with disabilities and 504 plans.</p>	Kathryn Mullen Upton	Exceptional
<p>It is unclear how the school forsees using RTI to provide or supplement SpEd services. This section is wholly undeveloped and does not indpire confidence that the applicant uderstands or is prepared to serve students with a range of needs, including low-incidence disabilities.</p>	Kristen Vandawalker	Exceptional

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<p>staff involved in the various student service teams changes from section to section. it is not clear how student's rights will be protected or how accountability will be assigned and enforced.</p>		
<p>The application states that students with disabilities will be automatically assigned to RTI tiers two or three; however, the application does not detail what comprises those tiers. Without more specific information on the tiers, it is difficult to determine alignment with the curriculum, instructional methods and mission, as well as whether a full range of programs and services exists.</p> <p>It is unclear why all students with IEPs will be automatically assigned to tiers two or three. Question: why are students automatically assigned to those two in particular? What if a student only needs tier one interventions?</p>	<p>Kathryn Mullen Upton</p>	<p>Exceptional</p>
<p>The response in question one did not fully articulate the full continuum of services. Further responses indicate that students with disabilities would be served in class. It is unclear if this is meant to be within the general education setting or within resource or separate settings. Responses regarding supports and services for students with disabilities were unclear.</p>	<p>Carol Ann Hudgens</p>	<p>Exceptional</p>
<p>Because the school will be K-8, there is not need for the applicant to expound on the services of students ages 14 and up.</p>	<p>Lisa Swinson</p>	<p>Exceptional</p>
<p>The narrative did not expound on the academic goals in question 2.</p> <p>While the narrative references three assessments (DIBELS, MAP, and state assessments), there is not detail that evidences how the use of these assessments will result in data that will drive instruction.</p> <p>While the promotions standards are clear, they are low, and not indicative of a rigorous instructional program.</p>	<p>Kathryn Mullen Upton</p>	<p>Student Perf</p>
<p>this section is wholly undeveloped and in many cases the questions are not answered in sufficient detail for evaluation.</p> <p>Why would students with a D average be able to be promoted. Will this not, after even one year, create a culture of low expectations and a student body that is multiple grade levels behind? Is it even possible for student to pass the EOG tests and have a grade as low as a D? What is the basis for believing that these practices are appropriate and will push students to achieve?</p> <p>No actual promotion standards or graduation requirements are presented.</p>	<p>Kristen Vandawalker</p>	<p>Student Perf</p>
<p>The discipline policy does not align with the narrative, and in some cases offers conflicting information. For example, the narrative indicates a Class I violation may result in an in-school suspension, but Attachment D (Student Handbook) states Class I violations may result in out-of-school suspensions.</p> <p>Similarly, the narrative states that Class II violations will result in suspensions up to 5 days, yet Attachment B states the suspensions may be up to 10 days.</p> <p>While there is reference to appeals, there is no appeal process set forth, and no procedural information (e.g., timelines regarding notice, hearing, decision, etc) was included.</p> <p>A very broad reference to IDEA was included regarding students with disabilities; no detail was included that would inform parents of student rights in these cases.</p>	<p>Kathryn Mullen Upton</p>	<p>Student Cond</p>
<p>This section does not address the standards as presented. There is no plan for setting a positive culture or promoting good behavior, nor is an approach to discipline outlined. It is not clear what Appendix D actually is, it appears to be a conglomeration of a number of documents.</p> <p>It appears that student conduct will be "graded." other than a scale (S/N/U), no parameters or description is provided.</p> <p>Why would the Board be involved in issues with "recurring late student pickups?" this is a management issue.</p> <p>Failure to present immunization records results in suspension? This is a disciplinary action, shouldn't it be exclusion or some other non-punitive/recorded action?</p> <p>How does the dress code "help students and faculty detect those who should not be at</p>	<p>Kristen Vandawalker</p>	<p>Student Cond</p>

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<p>the school?"</p> <p>Is it legal to require that students "dress gender appropriate?" How would clothing constitute a "threat to health or safety?"</p> <p>Why will there be no cafeteria? What extra provisions will be made for student health if lunch and snacks are eaten in the classroom. How will FRL eligible students be provided for?</p> <p>Why is the board involved in determining fees for extracurriculars?</p> <p>The discipline guidelines are underdeveloped and unreasonable. There is a heavy reliance on out-of-school offenses and it appears that the school intends to push out students it deems unworthy.</p> <p>VERIFY that the student handbook is not plagiarized in whole or part, this appears to be a poorly executed cut-and-paste. Additionally, it references New Jersey law.</p>		
<p>There are no references to the discipline of students with disabilities and the requirement to provide services in the event that a disciplinary removal results in a change in placement. It is highly recommended that the applicant review the NC Policies Governing Students with Disabilities.</p>	Carol Ann Hudgens	Student Cond
<p>Discipline policy in the handbook does not align with narrative.</p>	Lisa Swinson	Student Cond

Reviewer	Score
Joe Maimone	
Carol Ann Hudgens	Fail
Kathryn Mullen Upton	Fail
Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Sherry Reeves	
Kristen Vandawalker	Fail
Tammi Sutton	
Lisa Swinson	Fail

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IV. GOVERNANCE 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 upon application submission.

Name of Private Nonprofit: Legacy Academy of Charlotte, Inc.

Mailing Address: 20723

City/State/Zip: Cornelius NC 28031

Street Address: Torrence Chapel Rd, Suite 204

Phone: 704-892-4465

Fax:

Name of registered agent and address: Ann L. Vano, Esq.
517 Alcove Road, Suite 202
Mooresville, NC 28117

FEDERAL TAX ID:

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	Past or Present Professional Licenses(s) Held	Has any disciplinary action been taken against any of these professional licenses?

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Robert O'Connell	Treasurer	IREDELL	Retired		
Shannon Thompson	Academics	WATAUGA	CEO		
Colonel Jimmy Hull	Vice-Chair	WAYNE	Retired		
Dr. Kenneth Benton	Chair	WAYNE	Retired		
Dr. Kathy Thomas	Secretary	Out of State	Retired		

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.*

The Legacy Board functions, duties, roles and responsibilities are tied to three (3) primary roles: a) Policy Formulation, b) Decision Making and c) Oversight/Evaluation.

The following three roles a,b,c are reflected into five areas

1. Mission

- a) Formulate policies regarding development, review, and approval of mission, operating plans, and budgets.
- b) Approve mission and any changes. Approve the annual operating plan and the supporting operating and capital budgets.
- c) Appraise performance and appropriateness of any management corrective action taken. Ensure compliance with board policies.

2. Leadership

- a) Define Managing Director accountability and how performance will be appraised.
- b) Select Managing Director and determine compensation and annual increases.
- c) Appraise and audit operations to ensure compliance with board policies

3. Conduct of Operations

- a) Formulate policies regarding personnel, facilities, maintenance, safety, financial controls, and other legal requirements.
- b) Approve all policies formulated by management that involve legal, regulatory and external issues.
- c) Appraise and audit operations to ensure compliance with board policies.

4. Financial Stability

- a) Formulate policies regarding financial reporting and controls, control of reporting of contributions and donations, and financial auditing.
- b) Select independent auditor, review and approve audit report. Approve financial investments and financial choices.
- c) Monitor and appraise revenues, expenditures and cash position. Ensure compliance with board financial policies.

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5. Board Organization and Development

- a) Formulate policies regarding board member selection and expectations, board member orientation, board development, board committee assignments, board planning and performance evaluation.
- b) Approve by-laws and amendments; select board members; elect board officers; approve committee appointments, board work-plan and annual board budget.
- c) Develop a board information system to provide the information needed to carry out the board's oversight role; appraise board performance.

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.*

Legacy will be governed by a 5 member founding Board of Directors and move to a 7 member operating Board comprised of engaged advocates for the School Mission with diverse academic, leadership and business development backgrounds. When the board is at seven (7) members it will need to have at least two (2) members that live in Mecklenburg county. The Board of Directors will be assisted by an educational consultant in establishing and maintaining an on-going development of the knowledge and skills of the Board of Directors necessary to best fill their respective roles and responsibilities to the School. The Managing Director (who is the Head of School and principal) will be responsible for the education, evaluation and business affairs of the school as specifically delegated by the Board of Directors within the policies and procedures established by the Board of Directors, including hiring, student oversight, teacher development and volunteer coordination. The specific duties of the Board of Directors and the Managing Director are provided in the Legacy By-Laws. The primary key to the success of the Legacy Board is their focus on their three primary roles: policy formulation, decision making and oversight. The board will use the Gallup Path to evaluate the Managing Director of the school.

The Legacy Board is accountable to the State of North Carolina and to the enduring success of its students and should primarily identify with students rather than the School management or staff. All Legacy Board members are expected to put the welfare of Legacy and its Mission, Vision and Strategy ahead of their personal benefit or convenience.

As the School enrollment grows, the Managing Director and Academic Director roles will be supported by a Student Director and Curriculum Coach respectively. These roles together balance out the entire delivery of the School Mission so that the school can benefit from:

- 1) More ideas from more collaborative sources.
- 2) More involved and satisfied teachers/leaders in the school strategy and tactics.
- 3) Avoidance of over reliance on singular personalities and/or a detached, fragmented organization.
- 4) Functional staff engagement where the school leaders have to be more visionary and teach others what they are proposing rather than the typical top down vertical organization structure.
- 5) Flat organizations where people work best in organizations where people

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are the key resources.

The board will work with several committees which will be made up of key stakeholders including teachers and parents. This will help the board gain feedback of the effectiveness of the school and its accomplishing its mission. The School Operating Structure illustrated in Appendix U provides a much higher reliance on collaboration and leadership by Legacy staff than a more traditional administrator intensive operating structure.

Balance Scorecard will be used to monitor the performance of Legacy in accordance with its mission and objectives. This scorecard will be reviewed quarterly to ensure that the school is true to its purposes. In addition NWEA's MAPS will be used to monitor academic performance. These core metrics will be made available not only to the board but administrators to ensure all are working towards the same end and success of the school.

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?*

Legacy Board members have been self-selecting based on their mutual interests, common community organizations and mutual references by common colleagues. In addition they support a shared desire to develop leadership education.

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

Based on the Legacy By-Laws in Appendix H, the Legacy Board will generally meet monthly unless special circumstances require more frequent meetings.

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).*

The Legacy Board anticipates utilizing The Board on Track system for board training and governance as well as managing overall Board/Administration interaction/protocol. Legacy Board training and development topics shown below shall be covered at least one per month and shall be completed within each fiscal year. All topics below shall be covered every fiscal year. Board participation in The Board on Track is a mandatory Board obligation.

1. Review of Key Board Roles (Oversight, Accountability, Metrics, Evaluation)
2. Review/Evaluate Specific Success Drivers (Mission, Vision, Strategic Goals)
3. Recruitment, Orientation and Retention of Board Members
4. Public/NGO Financial Understanding for Board Members
5. Evaluating Managing Director/School Administration
6. Creating Successful Annual Board Retreats
7. Fund and School Partner Development
8. Running Effective Board Meetings/Board Meeting Protocol
9. Board Self-Assessment/Evaluation Criteria
10. Review/Evaluate Special Education Overview, Plans and Success Measures
11. Review Board Committees (Work, Structure and Board Oversight)
12. Measure and Review Ongoing School Constituent Satisfaction
13. Developing Key Board Operating Processes (Board on Track Orientation)
14. Review Legal Roles/Responsibilities of Board Members, By-Laws Policies
15. Review Hiring, Training, Professional Development, Employment Law

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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.*

The Legacy Board shall adhere to the Board Code of Conduct and Conflict of Interest Policies shown in Appendix J. Any Board member that violates these policies will be removed from the Board where the overall Board is required under the By-Laws to remove any offending Board member. All Legacy Board Members shall be required to submit a Board Member Compliance Letter affirming their individual compliance with the Code of Conduct and Conflict of Interest Policies prior to their becoming a Board Member as well as each year thereafter.

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

Two primary decision making concepts that the Legacy board will utilize are summarized below by Eugene Smoley, Jr.

The decision making process that the Legacy Board will use in developing School policies will follow the following principles (Smoley, Jr., Effective School Boards, 1999):

A. The Board will access and use relevant information. Relevant information comes from many sources, including School staff and the community. The Board will vet information to ensure it is accurate and balanced and use the information as an efficient guide for action. To be relevant, the information should also address Board concerns such as resolving immediate crises and strengthening longer-term educational results.

B. The Board will discuss issues deliberately. This step ensures that Board discussions are systematic, objective and open and that Board members consider the information in context and give the time necessary to avoid forcing decisions prematurely. It also includes Board members being coached to put aside personal differences and hidden agendas and consider the merits of a particular situation or issue without prejudice. It presumes Board members are honest and forthright in their exchange of viewpoints.

C. The Board considers alternative actions. This practice shows that the Board has discussed different points of view, has heard from all sides and assessed the positive and negative consequences of various choices.

D. The Board works toward consensus. This step requires Board members try to find areas of commonality, tolerate differences and recognize the need for compromise in reaching agreement.

The Legacy Board decision making process will be founded in best practice collaborative decision processes based on having clear Objectives, Actions, Risks and Resources. Each Legacy Board decision will be based within an effective decision making framework similar to the OARR Checklist illustrated. (See Appendix U)

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.*

Legacy Operating Committee

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The Legacy Operating Committee functions as the day-to-day collaborative body between the Legacy Board and the Legacy Administration. The Operating Committee facilitates the leadership development of School administrators, School staff, prospective board members and School students where practical. The Operating Committee is the primary venue where actual leadership talents, skills and knowledge is refined by each respective adult contributor in the School and otherwise modeled for School students.

The Legacy administrative structure will consist of the Managing Director and Academic Director and include instructional support staff to comprise the School Leadership Team. The School Leadership Team will work in collaboration with a group of parents and community members that comprise the Operating Committee. The Operating Committee, as approved by the Legacy Board, will be comprised of parents and community members that complement with the day-to-day roles of the School Leadership Team and not supplant the role of the School Leadership Team in leading the School day-to-day. The Operating Committee will collectively and constructively assist the Managing Director and his School Leadership Team, under the direction of the Legacy Board Vice-Chair and the Managing Director in fulfilling the Mission, Vision and Strategy of Legacy. The collaborative efforts of the School Leadership Team and the Operating Committee will be regularly facilitated each month via the monthly Operating Committee meeting to further develop and enhance the School learning environment and curriculum to further stimulate and motivate all Legacy students and teachers to reach excellence. The School Leadership Team will take the lead role in all Operating Committee functions required by the Legacy Charter and/or state law where all non-School Leadership Team members on the Operating Committee shall function in supporting roles wherever deemed appropriate by the Managing Director and the Legacy Board Vice-Chair. The combined Operating Committee and School Leadership Team topics of focus will include the following areas:

- * curriculum development
- * selection and organization of materials
- * implementation of research-based instructional strategies
- * horizontal and vertical articulation of curriculum and instruction
- * data analysis for student and school improvement
- * staff development
- * mentoring, coaching of teaching staff
- * media services coordination
- * special education services coordination
- * parental involvement
- * technology integration
- * service learning
- * character education
- * guidance services for students
- * testing coordinator
- * student assessment coordination
- * scheduling

See Legacy By-Laws and By-Law Exhibits in Appendix H. The Operating Committee concepts variously adapted from Thunderbird Preparatory Academy and Wayne Preparatory Academy.

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

Legacy Academy will work with parents in offering solutions that are win-win. The following is Legacy Academy's approach to resolving disputes with

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parents and the school.

Parental involvement, particularly parent volunteers, are key to the success of small learning communities like Legacy Academy. Parents are needed in order to have engaged schools. This includes their input which may lead to disputes.

At Legacy Academy, disputes will have three tiers of escalation. First, evidence has shown that disputes are best solved by those that created them. For example, if a conflict is between a parent and teacher, they should resolve the dispute at this first level. If this first layer of conflict resolution is not successful it will then escalate to second level, which is taking the matter to the managing director. If the dispute cannot be resolved with the managing director, the parent can then escalate the dispute to the third and final level which is with the Appeals Committee.

The Appeals Committee is commissioned by and responsible to the Legacy Governing Board. It has the responsibility of holding a hearing when requested by the parent(s) or guardian(s) of a student with a grievance with the school. Each hearing will be recorded to assure a proper record is maintained. The following procedure will be undertaken by the Appeals Committee

1. Assemble a review committee of at least three members of the Board and appoint one as "Chair".
2. Call meeting to order, (ask everyone to turn off cell phones, pagers, etc.)
3. Advise attendees that the hearing is being recorded.
4. The Chair states the date and time of hearing.

5. Confirm that no committee member has a conflict of interest.
6. Ask everyone to introduce himself/herself by name and role, beginning with the Chair.

7. Managing Director (or designee) explains reason for dispute.
8. Student/Parent explains the reason for dispute.
9. Student/Parent calls witnesses, if desired.
10. Managing Director (or designee) can respond if necessary.
11. Committee members ask clarifying questions.
12. The committee reviews the facts and makes a ruling. Committee decisions are final.

The Appeals Committee will be comprised of a minimum of three members of the Board, headed by the Chair of the Governance Committee. The Appeals Committee must have a minimum of three members present during each hearing. If the Chair of the Governance Committee is unable to attend, the substitute Chair of the Appeals Committee must be a current Board member.

Parental Notification

Students and parents will receive a Student Handbook at the beginning of the year. Parents/guardians and students will sign a form acknowledging receipt of the book and understanding of and consent to the discipline code in it. Expectations, as well as student rights and responsibilities, including the right to appeal, will be discussed during student orientation and in advisory seminars at the beginning of the school year.

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)

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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 from the NC Department of the Secretary of State. (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:

Outline below, 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.

Managing Director - 1

Academic Director - 1

Finance Officer - 1

Clerical - 2

Food Service Staff - 1

Guidance Counselor - 1

Office Manager - 1

Custodian - 1.5

Maintenance - 1.5

Core Teachers - 29

Specialty Teachers - 7

Exceptional Children Teachers - 6

Teacher Assistants - 8

Media Specialists - 1

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

The Legacy Board will utilize Gallup Teacher Insight for recruiting and retaining high-performing teachers. High teacher professional development is

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a primary driver of the Legacy academic success model. The Gallup Path is the research based sequence of identifying, developing and reinforcing the talents (strengths) of all individuals within an organization. The Gallup Path is primarily sequenced as follows:

Strength Identification (Teachers and Administrators)
Best Fit (Teachers and Administrators)
Great Administrators
Engaged Teachers
Engaged Students
Sustainable Teacher/Student Growth
Measurable Outcomes
Value to the Community

The ultimate core outcome of any successful, enduring organization is the active engagement of all its constituents, particularly its staff. Active engagement is the core objective of all Gallup talent development processes. Legacy will actively seek to practically apply all Gallup engagement processes within its professional development of all Legacy administrators, teachers and other staff.

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

The Legacy Academy Board of Directors will interview and employ the Managing Director. Once in place, the Managing Director will be responsible for reviewing applicant information, completing interviews, and presenting recommended candidates to the Legacy Academy Board of Directors for approval.

All charter school employees will be hired by the Legacy Managing Director under the direct approval/oversight of the Legacy Board as required by North Carolina law. All charter school employees will generally be at-will employees except where certain core administrators shall be retained under an employment agreement.

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

Recruitment and hiring of professional personnel will transpire on the basis of qualifications and merit. The Legacy Board will establish an effective recruitment program designed to attract, secure, and maintain the highest qualified persons for all positions at Legacy.

Legacy will be an equal opportunity employer. The Legacy Board will have the ultimate responsibility in assuring that all recruiting, selection, training, and other employment decisions will occur on the basis of individual merit and without discrimination because of race, religion, color, creed, disability, sex, age, or national origin in accordance with applicable state and federal laws. All Legacy job announcements and advertisements may also include where applicable such information as job title, major job responsibilities, location of the school, how to apply for the position, minimum qualifications, and deadline for receiving applications.

Each Legacy job applicant will provide an application form, North Carolina teaching credential, and three professional references. The Legacy Board

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will ensure that background checks and other investigations required by law are conducted prior to any hiring decision. The Legacy Board also reserves the right to conduct background checks on all employees or any individuals that have any contact with Legacy students.

Legacy will be a drug free workplace. Legacy will require pre-employment drug testing of all employees and maintains the right to perform random drug tests according to laws and policy to be set forth by the Legacy Board. Applications of candidates meeting all local, state, and federal guidelines for public school employment will be given to the Managing Director. All hiring interviews will be initially conducted by the Managing Director in order to provide recommendations for hiring to the Legacy Board. The Legacy board will have final say in all hiring.

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

Legacy anticipates employment salary ranges of \$30,000 to \$50,000 for teachers, \$30,000 to \$40,000 for staff and \$50,000 to \$90,000 for administrators. Legacy will initially offer health insurance only as employee benefits with life insurance, 403(b) retirement plans, and disability insurance offered as employee funded benefits under group policies where practical. School matching will be offered as the school becomes more financially established similar to other new charter school employment offerings.

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

Legacy expects to have certain reasonable policies and rules for the conduct of school employees. Legacy will generally retain its staff on an at-will basis. Legacy will have certain minimum rules that should not be violated under any circumstances. Violation of these minimum rules will lead to discipline, up to and including immediate termination. Examples of these rules include but are not limited to:

- * substance abuse
- * insubordination
- * consistent poor performance
- * theft
- * threats and weapons in the workplace
- * harassment
- * absenteeism and tardiness
- * misuse of property
- * fraud, dishonesty and false statements
- * violation and/or lack of enforcement of school rules
- * breaching confidentiality

This list is not all-inclusive, and there may be other circumstances for which employees may be disciplined, up to and including immediate termination. Legacy retains the discretion at all times to immediately terminate an employee or to decide what level or type of discipline is warranted, if any. Employees of Legacy are at-will employees and can be terminated at any time, without resorting to any type of discipline. Legacy does not have to use any of the following steps of discipline, and does not have to use them in any particular order, but retains the discretion at all times to determine the nature and severity of discipline and/or termination.

In the event it becomes necessary to discipline an employee, the following steps of discipline may occur at the discretion of the Managing Director and/or Legacy Board:

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1. Verbal warning
2. Written warning
3. Final warning and/or probation
4. Termination

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

The Legacy Board is unaware of any dual responsibility positions within Legacy.

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.

Legacy will comply with the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act, and the Americans with Disabilities Act. Teachers with certifications in Exceptional Children, Gifted and Talented and ELL will be employed based on the needs of the student population. These teachers will assist in the development, planning, and screening of EC students or prospective EC students. All students identified as qualifying for services under IDEA or 504 will be referred by the parent or teacher to either the Managing Director or Academic Director. A team composed of the student's teachers, parent/guardians, Managing Director or Academic Director (IEP / 504 Team) and the Exceptional Children's Coordinator will convene to discuss the educational program designed to meet the individual students needs. In addition, Legacy will provide gifted and talented students and ELL students with adequate staffing as student needs are identified.

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).

Legacy Academy will seek to employ highly qualified and certified teachers to fill all positions. One of the first classroom positions to be filled will be the Exceptional Children's teacher. Once hired, this person will be available to work with parents and other school staff regarding any special needs which may exist with students. The Exceptional Children's teacher must have a valid North Carolina teacher's certificate and hold appropriate credentials for exceptional children's education. Classroom and elective teachers need valid North Carolina teaching credentials. Teachers for gifted students shall have all gifted student credentials. In the event a teacher does not have the appropriate credentials but meets the 4 year degree requirement, it will be necessary to establish a plan for the individual to secure their certification. Beginning Teacher Support will be put in place to assist the teacher with securing the appropriate credentials.

Staff Evaluation and Professional Development

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

The Managing Director and Academic Director both need to be involved with teacher licensure to ensure checks and balances. Professional development oversight will also include the Managing Director and Academic Director.

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.

Legacy shall actively comply with all requirements for highly qualified

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teachers as provided in The No Child Left Behind Act of 2001 (NCLB). Legacy Academy will emphasize the importance of teacher quality and their development as a crucial factor in improving student achievement. We understand that NCLB requires that we ensure that public elementary school teachers are highly qualified to teach the basic elementary school curricula, and that middle school teachers are highly qualified to teach each core academic subject teaching assignment. The core academic subjects are defined as the following: English, reading or language arts, mathematics, science, foreign languages, civics and government, economics, history, geography, and fine arts. Legacy will evaluate teachers by regular classroom visitations. Master Teachers will be paired with newer teachers to help in mentoring and guidance.

Recruitment and hiring of professional personnel will transpire on the basis of qualifications and merit. Legacy will establish an effective recruitment program designed to attract, secure, and maintain the highest qualified persons for all positions at Legacy Academy. Legacy will be an equal opportunity employer. Its responsibility will include recruiting, selection, training, and other employment decisions on the basis of individual merit and without discrimination because of race, religion, color, creed, disability, sex, age, or national origin in accordance with applicable state and federal laws. Individuals designated by the Legacy Board will analyze each required job prior to initiating the recruitment process in order to determine which recruitment strategies will be the most effective for the specific job vacancy.

- 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.*

The core components of professional development are extensive strength based Gallup seminars to identify teachers strengths. Training will be conducted both internally and externally by experts.

The Gallup Student Poll supplies teachers, administrators, and school leaders with an accurate, useful, and holistic picture of their students and the outcomes they desire. Research by The Gallup Organization shows that hope, engagement, and well-being are positioned as actionable targets and indicators of success, with links to grades, achievement scores, retention, and future employment.

The Gallup Student Strengths Finder Assessment is based on the premise that individual student success is the core of any great school. The Gallup strengths-based approach to student development helps educators, leaders, adults, and students understand the unique talents of every child. Rooted in the science of Positive Psychology, strengths-based student development begins with the assumption that every child is uniquely talented. The Gallup Path enables students to develop these natural patterns of thought, feeling, and behavior - their talents - through the Strengths Explorer and Strengths Quest tools. Students are given a report of their top themes of talent along with action items to help build their talents into true strengths.

Measures of Academic Progress (MAP) is a state-aligned computerized adaptive assessment program that will provide Legacy teachers and parents the information needed to improve teaching and learning. Legacy teachers will use the growth and achievement data from MAP to develop targeted

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instructional strategies and to plan school improvement. With the ability to test students up to three times a year, Legacy MAP test results will enable the teachers to make student-focused, data-driven decisions.

Weekly ongoing two hour collaborative planning sessions usually on Mondays which will allow teachers planning time within and across grade levels.

- 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.*

There will be a teacher orientation before the beginning of the school year to train teachers in the Mission, Goals and Leadership Culture of the school. They will go through Gallup Path and be taught the Covey Leadership Principles. Teachers will be required to follow the core curriculum, Core Knowledge Sequence and use the Core Knowledge Language Arts for reading and language; however, they will be encouraged to present that curriculum in a variety of ways through differentiated instruction. Six instructional strategies will be utilized throughout all subject areas: integrative units, small group activities, Project-based learning, classroom workshop, authentic experience, and reflective assessment. All units of study will be built around these foundations of successful instruction.

- 5. Describe the expected number of days/hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan.*

Teachers will receive Professional Development at the beginning of the school year. Three days will be allocated to Covey's Seven Habits of Highly Effective People; Gallup Strengths Finder training will require one day; Core Knowledge Sequence training will require three days of training resulting in the teachers developing the domain maps for the school. Two days of training involving the use of Core Knowledge Language Arts will be provided and one day of professional development will be included for Math. These established professional development dates will be followed up with additional support for leadership and curriculum training throughout the school year. Teachers will receive 2 to 3 hours every week to collaborate with colleagues regarding Gallup, Covey's Leadership Skills and Core Knowledge. The Gallup Paths research indicates that school engagement begins with teachers. In order to accomplish the mission of an engaged community of learners, significant time and money will be allocated to teacher development.

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)).

Legacy Academy has a marketing plan in place. This marketing plan includes

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several components that will reach the largest audience possible for the amount of resources it has. This strategy includes to establish a Facebook and Website as well as to use Newspaper Advertisements, Radio, Public Community Meetings, Charter Approval Events and Word of Mouth referrals. Most of our marketing expense will be used in social media since more and more parents are turning to digital devices for gathering their information.

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

Parent, community, and educator involvement will be an essential component of the school. As the influence of the home directly impacts the students well-being and academic motivation, Legacy will strive to facilitate, encourage and compliment a high standard of volunteer parental involvement. Legacy will plan explicit fundamental strategies to actively engage families, community members, and educators from the onset of conditional charter by the North Carolina State Board of Education including:

1. Legacy will continue to recruit interested students via its website, Facebook presence and public advertisements. All parents of interested students will receive periodic mailings to keep all informed of the progress of Legacy through its lottery process, administrator/teacher hiring process and facility announcements.

2. Legacy will sponsor various public "charter approval" events that celebrates the approval milestone. Charter approval events may include an outdoor ice cream social, community gatherings, prominent speaker appearance, or any other low cost, high contact events that raise the profile of Legacy.

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.

Legacy will plan explicit fundamental strategies to actively engage families, community members, and educators. The Legacy Board will develop in concert with its Administrators overall parental support guidelines, which will include the following:

1. All parents will be essential participants in the growth, accountability, and overall success of their children and will therefore be strongly encouraged to contribute volunteer hours along with staff and community members during both regular operational hours as well as special events.

2. Constructive parental concerns and recommendations will be encouraged for the improvement of Legacy.

3. Mandatory parent-teacher conferences will include students and will occur on a regular basis. Teachers will be flexible to allow conferences to be held at times and dates convenient for parents. Parents will receive an

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accurate picture of their child's progress and have a constructive venue to regularly provide their context and input for the overall success of their child. Together, parents, teachers, and students will establish learning goals that help the student achieve at the highest levels. Collaborative goal setting will develop a true partnership and sense of ownership for success.

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. Tentative dates for application period; enrollment deadlines and procedures.

Legacy will begin advertising for student enrollment application on October 15, 2015 and each October 15 thereafter. The enrollment deadline for Legacy will be February 15, 2016 and each February thereafter. All enrollment applications may be submitted either paper application (blank forms will be made available at Iredell County public facilities) or by website electronic enrollment. All student enrollment applications will be received and processed by the Managing Director of Legacy. Media advertisements and public announcements will clearly state how or where applications are available and the deadline for receipt of completed applications.

2. Clear policies and procedures detailing the open enrollment lottery plan including policies regarding statutory permitted student enrollment preferences.

If the number of applicants exceeds the capacity of a program, class, grade level or building, a lottery process will be used to determine enrollment. The lottery will be held no later than March prior to the beginning of the school year.

- * The names of each applicant will be placed on an index card.
- * The individual index card will be placed in a box.
- * All index cards placed in the box will be shuffled.
- * An individual with no professional or business relationship to Legacy Academy will randomly select index cards from the box.
- * The name of the student will be announced and assigned a lottery number. This number will be recorded on the index card and the application. This information will also be recorded on a ledger.
- * This process will continue until all index cards have been drawn and recorded.
- * The names drawn in lottery number order equaling the enrollment openings will be placed on the class roster.
- * The remaining names will be placed on a waiting list in their lottery

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order number.

* The above lottery process will be repeated for all grade levels.

* Class rosters for each grade level will not be finalized until the lottery process for K thru 8 grades is complete.

If feasible, after the first year of operations, the lottery will be conducted via an auditable, statistically valid computer program.

Legacy will give priority enrollment to as permitted by North Carolina state law and recent legislation changes in House Bill 250 . An enrollment spreadsheet will organize all students and siblings assuring a transparent and documented enrollment process to ensure fair and legal entrance to Legacy.

3. Policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.

Legacy will maintain a student wait list for all students not immediately chosen in the lottery process above. Such wait list shall be maintained for the duration of the Legacy school year based on Legacy admission policies.

If a student chooses to withdraw from the school, a parent/guardian will be asked to fill out a withdrawal form stating the effective date and school where students records should be sent. If a school name is provided, Legacy will transfer the students records, otherwise Legacy will wait until a request for records is received. Any transfers into Legacy shall be subject to Legacy enrollment policies, enrollment application process, lottery and North Carolina law governing inbound transfer students.

4. Explanation of the purpose of any pre-admission activities (if any) for students or parents.

Legacy will hold orientation meetings for all prospective Legacy parents and students so as to establish clear expectations and objectives within the Legacy charter.

5. Clear policies and procedures for student withdrawals and transfers.

Any transfers into Legacy or withdrawals shall be subject to Legacy enrollment policies, enrollment application process, lottery and North Carolina law governing inbound transfer students.

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PROJECTED ENROLLMENT

2016-17 through 2020-2021

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Charlotte-Mecklenburg Schools

LEA #2

LEA #3

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

	2016-2017			2017-2018			2018-2019			2019-2020			2020-2021		
	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000
Kindergarten	100	0	0	100	0	0	100	0	0	100	0	0	0	0	0
Grade 01	100	0	0	100	0	0	100	0	0	100	0	0	0	0	0
Grade 02	100	0	0	100	0	0	100	0	0	100	0	0	0	0	0
Grade 03	100	0	0	100	0	0	100	0	0	100	0	0	0	0	0
Grade 04	100	0	0	100	0	0	100	0	0	100	0	0	0	0	0
Grade 05	100	0	0	100	0	0	100	0	0	100	0	0	0	0	0
Grade 06	100	0	0	100	0	0	100	0	0	100	0	0	0	0	0
Grade 07	0	0	0	100	0	0	100	0	0	100	0	0	0	0	0
Grade 08	0	0	0	0	0	0	100	0	0	100	0	0	0	0	0
	700			800			900			900			0		

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Section IV: Governance and Capacity	Reviewer	Page
<u>Concerns and Additional Questions</u>		Reference

Reviewer	Score
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V. OPERATIONS

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.

Legacy will not provide school bus transportation to or from school unless a critical mass of at least 50 students without transportation alternatives are identified. Legacy will actively advertise to parents in the enrollment process that Legacy will facilitate transportation for students not otherwise able to attend Legacy. Families will provide their own carpool transportation. Legacy will provide a carpool assistance committee, helping parents arrange carpools to ease transportation needs. Extenuating circumstances preventing carpool transportation will be presented to the Board of Directors. The Legacy proposed budget includes contingency funds to assure student transportation arrangements are possible in extraordinary situations as approved by the Board of Directors and according the North Carolina state law.

Transportation shall not be an obstacle to any child attending this school.

School Lunch Plan:

Describe in detail the school lunch plan that will ensure that no child is lacking a daily meal. The details of this plan should align with the targeted student population and school budget proposal.

The Legacy lunch program will be created and operated under the auspices of the Legacy Operating Committee staffed by parent volunteers. There is no cafeteria, so all students will need to bring a healthy lunch (snack where appropriate) from home. Lunch at Legacy will be eaten "parochial school style" in the classrooms. Parent volunteers will watch the classes during their 30 minutes of lunch and 30 minutes of recess immediately following lunch. Students in grade levels K-2 will also have a morning snack break. Lunch will also be offered every full school day at the school by school approved outside vendors and must be pre-ordered via parent/teacher orders. Outside lunch vendors will be identified, screened and managed by a designated member of the Operating Committee. Students in economic need will have a lunch provided by the School by the same outside vendor lunch order process described above.

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

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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	\$3,000,000		\$6,059.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$5,500.00
Property Insurance	\$1,500,000		\$4,522.00
Motor Vehicle Liability	\$1,000,000		\$192.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$1,000.00
Other	\$500,000		\$15,529.00
Total Cost			\$32,802.00

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

legacyacademy 09/22/2014

(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 Q).

Legacy expects to open, if approved, in temporary facilities by leasing an existing building until it can acquire a permanent facility, either an existing building or if financially possible depending on acquiring costs, develop land. The initial size of the school, and a survey of the real estate market in the county suggests that unused commercial space will be available for the size of the school through the first two to three years of operation. We have retained the services of real estate agents, legal counsel, and architects to assist in identifying, evaluating, and developing proposed modifications to target properties in accordance with our target

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market, the needs of the students, building code requirements, and financial efficiencies.

We have been targeting leasing facilities as well as looking at buildings to buy based on size and location. Immediately after our charter application is approved we will move forward to lease a temporary facility and eventually purchase a permanent site.

The Legacy Board has established a Preliminary Building Timeline to assure it has fully identified all key facility planning and acquisition milestones. The Preliminary Building Timeline outlined below provides a fairly concise outline of facility planning typically used by commercial organizations in their facility acquisition process. Each step will include the entire Legacy Board in an oversight role where at least two Board members will serve in lead facility acquisition roles for the benefit of the entire board.

Preliminary Building Timeline

July 2015

Facility Financing Options

Land/Lease Due Diligence

Land/Lease Contract

Land Purchase

September 2015

Land/Use Plan Design

Building Design

October 2015

Building Permitting

Site Prep

January 2016

Construction Commencement

July 2016

Certificate of Occupancy

September 2016

School Opening

What is the breakdown of cost per square foot for the proposed facility? Outline how this cost is comparable to the commercial and educational spaces for the proposed school location.

The budget assumes a \$30/sq. ft. cost for the proposed facility based on recent known educational lease rate activity in the area. The assumed rate also provides some cushion to allow for the possible development of the permanent facility option.

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.*

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We intend to identify several proposed properties that will meet our initial needs and pursue a multi-track approach to facilities. Delays in acquisition, zoning, and modifications are common in these sorts of projects. Therefore, having several under study is the best approach to obtaining suitable facilities in time for opening.

The Legacy Board will develop various facility possibilities that are mutually exclusive wherever possible. The Legacy Board anticipates three viable options that can be fully developed based on preliminary due-diligence already completed by the Legacy Board. Each of these have different price points with one being the least expensive to three being the most expensive. In order for three to be solvent, it would take the right purchase price for the right piece of land.

1. The initial plan is to acquire a temporary facility to lease
2. The second plan is to purchase or lease/purchase a permanent facility
3. The third plan is to Purchase and develop a permanent facility on land.

We anticipate needing approximately 30,000 square feet of lease space for year one and two. For year three we anticipate needing approximately 44,000 square feet for K-8 in Legacy's permanent facility. Both the temporary facility and eventual permanent facility will be in compliance with applicable building codes, health and safety laws, and with the requirements of the Americans with Disabilities Act (ADA). Before the start of School operations, the Board will provide all necessary information to the Office of Charter Schools, including a Certificate of Occupancy for Educational Use.

If a permanent site is not acquired, it will not be a hindrance to the education of Legacy Academy students. The Legacy Board does not anticipate that any school programs will be affected in the event a permanent facility is not secured.

Section V: Operations Concerns and Additional Questions	Reviewer	Page Reference
The plan is to facilitate carpool groups, but there is no detail on how the board will execute this strategy. Additionally, it is likely, in a 700-900 student school, that more than fifty students will need transportation. Question for interview: please discuss in further detail how the board will execute this strategy. Please also discuss how the school will fund transportation in the event more than fifty students (likely in a 700 - 900 students school) will need transportation.	Kathryn Mullen Upton	Transportati
How will the applicant provide special transportation for students with disabilities that require it as a related service on the IEP?	Carol Ann Hudgens	Transportati
Information about the schools transportation plan should be included in marketing. If a decision will be made after enrollment, there are some students who will miss the opportunity to attend the school.	Lisa Swinson	Transportati
There is no evidence that the school will accept all students, nor is it believable that transportation will not be an obstacle for attendance.	Kristen Vandawalker	Transportati
this section is underdeveloped and contradictory.	Kristen Vandawalker	School Lunch
It will likely be difficult to rely solely on parent volunteers to staff lunch daily for a 700-900 student school.	Kathryn Mullen Upton	School Lunch
With no cafeteria and no food service infrastructure, it's unclear how even with a		

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vendor the school will provide hot meals. At least some food service equipment will likely need to be purchased.		
why is their quote almost double the others i have seen so far?	Kristen Vandawalker	Civil Liabil
Board chair did not sign. Signed by "legacy academy".	Lisa Swinson	Healthy and
How are the architect, RE vendor, and legal counsel currently being paid? Why is	Kristen Vandawalker	Facility and

Reviewer	Score
Joe Maimone	
Carol Ann Hudgens	
Kathryn Mullen Upton	Pass
Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Sherry Reeves	
Kristen Vandawalker	Fail
Tammi Sutton	
Lisa Swinson	Pass

VI. 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 2016-17

**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 #1600 - Charlotte-Mecklenburg Schools

Revenue	2014-2015 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2016-2017
State Funds	\$4,505.20	700	\$3,153,640.00
Local Funds	\$2,493.00	700	\$1,745,100.00
Federal EC Funds	\$3,768.11	70	\$263,767.70
Totals			\$5,162,507.70

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Total Budget: Revenue Projections 2016-17 through 2020-2021

INCOME: REVENUE PROJECTIONS	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
-State ADM Funds	\$3,153,640	\$3,604,160	\$4,054,680	\$4,054,680	\$4,054,680
-Local Per Pupil Funds	\$1,745,100	\$1,994,400	\$2,243,700	\$2,243,700	\$2,243,700
-Exceptional Children Federal Funds	\$263,768	\$301,449	\$339,130	\$339,130	\$339,130
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$5,162,508	\$5,900,009	\$6,637,510	\$6,637,510	\$6,637,510

***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 S.

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Personnel Budget: Expenditure Projections 2016-17 through 2010-2021

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.

BUDGET EXPENDITURE PROJECTIONS Personnel	2016-2017			2017-2018			2018-2019			2019-2020			2020-2021		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary
Administrative & Support Personnel:															
Lead Administrator	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000
Assistant Administrator	1	\$57,000	\$57,000	2	\$57,000	\$114,000	2	\$57,000	\$114,000	2	\$57,000	\$114,000	2	\$57,000	\$114,000
Finance Officer	1	\$62,000	\$62,000	1	\$62,000	\$62,000	1	\$62,000	\$62,000	1	\$62,000	\$62,000	1	\$62,000	\$62,000
Clerical	2	\$23,000	\$46,000	2	\$23,000	\$46,000	3	\$23,000	\$69,000	3	\$23,000	\$69,000	3	\$23,000	\$69,000
Food Service Staff	1	\$15,000	\$15,000	1	\$15,000	\$15,000	2	\$15,000	\$30,000	2	\$15,000	\$30,000	2	\$15,000	\$30,000
Custodians	1.5	\$33,000	\$49,500	2	\$33,000	\$66,000	2.5	\$33,000	\$82,500	2.5	\$33,000	\$82,500	2.5	\$33,000	\$82,500
Transportation Staff	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Guidance	1	\$40,000	\$40,000	1	\$40,000	\$40,000	2	\$40,000	\$80,000	2	\$40,000	\$80,000	2	\$40,000	\$80,000
Office Mgr	1	\$45,000	\$45,000	1	\$45,000	\$45,000	1	\$45,000	\$45,000	1	\$45,000	\$45,000	1	\$45,000	\$45,000
Maintenance	1.5	\$37,000	\$55,500	2	\$37,000	\$74,000	2	\$37,000	\$74,000	2	\$37,000	\$74,000	2	\$37,000	\$74,000
A - Total Admin and Support:	11		\$450,000	13		\$542,000	16.5		\$636,500	16.5		\$636,500	16.5		\$636,500
Instructional Personnel:															
Core Content Teacher(s)	29	\$38,000	\$1,102,000	33	\$38,000	\$1,254,000	37	\$38,000	\$1,406,000	37	\$38,000	\$1,406,000	37	\$38,000	\$1,406,000
Electives/Specialty Teacher(s)	7	\$37,500	\$262,500	8	\$37,500	\$300,000	8	\$37,500	\$300,000	8	\$37,500	\$300,000	8	\$37,500	\$300,000
Exceptional Children Teacher(s)	6	\$42,000	\$252,000	7	\$42,000	\$294,000	8	\$42,000	\$336,000	8	\$42,000	\$336,000	8	\$42,000	\$336,000

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Instructional Support	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Teacher Assistants	8	\$20,000	\$160,000	8	\$20,000	\$160,000	8	\$20,000	\$160,000	8	\$20,000	\$160,000	8	\$20,000	\$160,000
Media Specialist	1	\$35,000	\$35,000	2	\$35,000	\$70,000	2	\$35,000	\$70,000	2	\$35,000	\$70,000	2	\$35,000	\$70,000
B - Total Instructional Personnel:	51		\$1,811,500	58		\$2,078,000	63		\$2,272,000	63		\$2,272,000	63		\$2,272,000
A+B = C - Total Admin, Support and Instructional Personnel:	62		\$2,261,500	71		\$2,620,000	79.5		\$2,908,500	79.5		\$2,908,500	79.5		\$2,908,500
Administrative & Support Benefits															
Health Insurance	10	\$4,200	\$42,000	13	\$4,200	\$54,600	16	\$4,200	\$67,200	16	\$4,200	\$67,200	16	\$4,200	\$67,200
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	1	\$6,453	\$6,453	1	\$7,859	\$7,859	1	\$9,229	\$9,229	1	\$9,229	\$9,229	1	\$9,229	\$9,229
Social Security	1	\$27,590	\$27,590	1	\$33,604	\$33,604	1	\$39,463	\$39,463	1	\$39,463	\$39,463	1	\$39,463	\$39,463
D - Total Admin and Support Benefits:	12		\$76,043	15		\$96,063	18		\$115,892	18		\$115,892	18		\$115,892
Instructional Personnel Benefits:															
Health Insurance	51	\$4,200	\$214,200	58	\$4,200	\$243,600	63	\$4,200	\$264,600	63	\$4,200	\$264,600	63	\$4,200	\$264,600
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	1	\$112,313	\$112,313	1	\$128,836	\$128,836	1	\$140,864	\$140,864	1	\$140,864	\$140,864	1	\$140,864	\$140,864
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	1	\$26,267	\$26,267	1	\$30,131	\$30,131	1	\$32,944	\$32,944	1	\$32,944	\$32,944	1	\$32,944	\$32,944
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
E - Total Instructional	53		\$352,780	60		\$402,567	65		\$438,408	65		\$438,408	65		\$438,408

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Personnel Benefits:														
D+E = F - Total Personnel Benefits	65		\$428,823	75		\$498,630	83		\$554,300	83		\$554,300	83	\$554,300
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	23		\$526,043	28		\$638,063	34.5		\$752,392	34.5		\$752,392	34.5	\$752,392
B+E = H - Total Instructional Personnel (Salary & Benefits)	104		\$2,164,280	118		\$2,480,567	128		\$2,710,408	128		\$2,710,408	128	\$2,710,408
G+H = J - TOTAL PERSONNEL	127		\$2,690,323	146		\$3,118,630	162.5		\$3,462,800	162.5		\$3,462,800	162.5	\$3,462,800

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Operations Budget: Expenditure Projections
2016-17 through 2020-2021

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
	Administrative & Support:					
Office:	Office Supplies	\$24,000	\$26,000	\$30,000	\$30,000	\$30,000
	Paper	\$15,000	\$17,000	\$19,000	\$19,000	\$19,000
	Computers & Software	\$27,000	\$29,000	\$29,000	\$25,000	\$25,000
	Communications & Telephone	\$6,400	\$7,000	\$7,750	\$7,750	\$7,750
	Copier leases	\$14,000	\$18,400	\$22,400	\$22,400	\$22,400
Management Company	Contract Fees	\$0	\$0	\$0	\$0	\$0
Professional Contract	Legal Counsel	\$12,000	\$15,000	\$25,000	\$25,000	\$25,000
	Student Accounting	\$60,000	\$70,000	\$80,000	\$80,000	\$80,000
	Financial	\$15,000	\$18,000	\$20,000	\$20,000	\$20,000
	Other Professional	\$70,000	\$80,000	\$90,000	\$90,000	\$90,000
Facilities	Facility Lease/Mortgage	\$900,000	\$1,000,000	\$1,200,000	\$1,200,000	\$1,200,000
	Maintenance	\$35,000	\$45,000	\$55,000	\$55,000	\$55,000
	Custodial Supplies	\$38,000	\$43,440	\$48,870	\$48,870	\$48,870
	Custodial Contract	\$0	\$0	\$0	\$0	\$0
	Insurance (pg19)	\$32,802	\$39,400	\$44,250	\$44,250	\$44,250
	Other	\$20,000	\$25,000	\$30,000	\$30,000	\$30,000
Utilities	Electric	\$32,500	\$39,250	\$47,000	\$47,000	\$47,000
	Gas	\$18,000	\$19,500	\$21,250	\$21,250	\$21,250
	Water/Sewer	\$10,000	\$11,000	\$12,000	\$12,000	\$12,000
	Trash	\$5,000	\$6,250	\$8,400	\$8,400	\$8,400
Transportation	Buses	\$12,000	\$15,000	\$18,000	\$18,000	\$18,000
	Gas	\$0	\$0	\$0	\$0	\$0
	Oil/Tires & Maintenance	\$0	\$0	\$0	\$0	\$0
Other	Marketing	\$12,000	\$12,000	\$7,500	\$7,500	\$7,500
	Child nutrition	\$77,500	\$89,250	\$99,400	\$99,400	\$99,400
	Travel	\$6,000	\$8,000	\$8,000	\$8,000	\$8,000
	Other	\$18,000	\$21,000	\$24,000	\$24,000	\$24,000
	K - TOTAL Administrative & Support Operations	\$1,460,202	\$1,654,490	\$1,946,820	\$1,942,820	\$1,942,820
	Instructional:					
Classroom Technology	Computers	\$60,000	\$55,000	\$55,000	\$30,000	\$30,000
	Software	\$20,000	\$24,000	\$26,000	\$26,000	\$26,000

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	Instructional Technology	\$52,200	\$25,000	\$25,000	\$25,000	\$25,000
	Other	\$12,000	\$13,500	\$15,000	\$15,000	\$15,000
Instructional Contract	Instructional Support	\$82,000	\$87,000	\$95,000	\$95,000	\$95,000
	Staff Development	\$97,000	\$112,000	\$124,000	\$124,000	\$124,000
Books and Supplies	Instructional Materials	\$33,000	\$38,500	\$45,000	\$45,000	\$45,000
	Curriculum/Texts	\$95,000	\$47,000	\$47,000	\$38,000	\$38,000
	Copy Paper	\$18,000	\$22,000	\$26,000	\$26,000	\$26,000
	Testing Supplies	\$33,500	\$39,000	\$45,000	\$45,000	\$45,000
	Other	\$7,000	\$9,000	\$12,000	\$12,000	\$12,000
Classroom Technology	Computers	\$0	\$0	\$0	\$0	\$0
	L - TOTAL Instructional Operations	\$509,700	\$472,000	\$515,000	\$481,000	\$481,000
	K+L = M - TOTAL OPERATIONS	\$1,969,902	\$2,126,490	\$2,461,820	\$2,423,820	\$2,423,820

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Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
J - TOTAL PERSONNEL	\$2,690,323	\$3,118,630	\$3,462,800	\$3,462,800	\$3,462,800
M - TOTAL OPERATIONS	\$1,969,902	\$2,126,490	\$2,461,820	\$2,423,820	\$2,423,820
J+ M =N TOTAL EXPENDITURES	\$4,660,225	\$5,245,120	\$5,924,620	\$5,886,620	\$5,886,620
Z - TOTAL REVENUE	\$5,162,508	\$5,900,009	\$6,637,510	\$6,637,510	\$6,637,510
Z - N = SURPLUS / (DEFICIT)	\$502,283	\$654,889	\$712,890	\$750,890	\$750,890

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.

Legacy performed a cost benefit analysis using a Static Break-even, market analysis and financial sustainability. As outlined below, Legacy's Static Break-Even Analysis shows that Legacy can operate a charter school with 395 students. Through demographic, market analysis and survey data presented earlier in this application Legacy has recognized a need for a charter school far greater than the 395 students necessary to operate on a break-even basis. While the market analysis supports a demand greater than the year one initial 700 proposed student enrollment capacity, the school enrollment was based on the optimal community size to implement its mission versus implementation cost and school financial sustainability.

The Static Break-Even Analysis calculated below would be a starting point for any "right sizing" of the overall Legacy operations in the event of any extraordinary negative enrollment variances. Any viable "right sizing" analysis is always based more on real time Dynamic Break-Even calculations which take into consideration real revenue components tied to specific costs (actual classroom enrollment relative to teaching staff needed to viably serve those students at that enrollment level).

Annual Revenues Required for Static Break-Even on a Cash Flow Basis:

Total Fixed Expenses	1,864,090	BE Revenues	Students
Contribution Margin	64%	= 2,913,920	= 395

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

Legacy has established an Operating Surplus (Contingency Reserve) of 9.7% to 11.3% in its 5 year budget to provide a buffer for minor fluctuations in revenue. Revenue shortfalls approaching the Reserve, including any negative enrollment variances will trigger a formal written operational and financial impact analysis by the Legacy Board. Any resulting right sizing decisions made in the overall best interest of the school will be based on objective, constructive financial analysis including a Dynamic Break-even analysis without any bias for Legacy personnel, student or Board personal preferences. Such corrective adjustments associated with enrollment shortfalls may include but not limited to offsetting reductions in staffing, compensation, supply and technology expenditures. In addition, the Board may

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also seek to revise lease escalators to provide additional ramp-up in lease rates that coincide with increases in student enrollment from grade additions in subsequent years.

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

Legacy will seek to obtain federal grant monies, however the budget contained herein does not contemplate any additional funds outside of the state and county allotments provided to Legacy. Legacy's only credit need is in the form of a lease or purchase of its school facilities. Any other Legacy funding needs will be driven by absolute school need versus want so as to assure the best economic outcome for Legacy.

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

K 10:1; 1st 16:1; 2nd 20:1; 3rd+ 25:1

- 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.*

The Board of Directors of Legacy will explore and implement the best options for managing the business affairs of Legacy. At a minimum, the Legacy Board will implement best practice accounting, purchasing, payroll and audit policies and procedures (collectively "Business Affairs") as lead by the Board Treasurer and the outside advice of the prospective Legacy auditor until they formally become the auditor of Legacy. Such best practice Business Affairs will have specific metrics as developed within a Balanced Scorecard process/format that represent the key Business Affairs operations as regularly reported to the Legacy Board in its monthly board meetings. All subsequent development and implementation of Legacy Business Affairs policies and procedures will be carried out by the onsite Financial Officer of Legacy retained by the Legacy Board. The Legacy Board reserves the right to further research and explore all options for fulfilling Legacy Business Affairs on a best long term value basis. Instructional support will be determined based on actual enrollment and best available resources to meet student needs. All options, selection criteria and selection processes will be done on a fully documented, comparative basis so as to assure best outcomes for Legacy. All Legacy financial and related Business Affairs activities will be done via the NC mandated ISIS financial system. In accordance with North Carolina General Statutes, Legacy will adhere to reporting requirements established by the State Board of Education in the Uniform Education Reporting System by reporting at least annually to the State Board of Education via the Department of Public Instruction.

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

Legacy budget criteria includes: 1) classroom sizes comparable to Mecklenburg County LEA, 2) master/apprentice teacher staffing model where proven teachers can excel professionally through extensive professional development and achievement, 3) efficient use of technology/curriculum resources, and 4) budget surplus or contingency always approximates 9-11% annually. The budget surplus serves as a contingency for negative variances

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in enrollment.

Legacy Academys mission is to cultivate a community that engages and inspires each child to reach their unique potential and achieve their leadership aspirations. The Leadership emphasis requires a strong institutional focus of high efficiency, collaborative teaching. The limited financial resources available to Legacy, compared to the surrounding traditional LEAs, creates the very impetus for Leadership to be well thought and efficiently delivered. This is reflected in Legacy's classroom teacher staffing at start-up which will follow a master/apprentice model, with experienced teachers taking grade leader roles and coaching less experienced and/or new teachers to help them reach their unique leadership potential. The key activity of any school is its teaching process as driven by classroom teachers, specialized teachers and school administrators. School personnel as the primary school expenditure approximates 61% of all Legacy expenditures. Legacy will also rely on parent volunteers who pass background checks to supplement the office personnel on an as needed basis as well as lunch and recess monitoring.

The Text and Technology as well as Support Costs (All fixed costs necessary to facilitating the teaching process) are complimentary expenditures that facilitate the teacher driven process yet can rarely supplant the actual classroom teacher experience.

Legacy will not provide bus transportation but will facilitate a parent lead carpool assistance committee to ease transportation needs and provide transportation for students not otherwise able to attend Legacy. However, the Legacy proposed budget includes contingency funds to assure student transportation arrangements are possible in extraordinary circumstances and assure that transportation is not an impediment to entry.

Legacy'S budgeted facilities will reflect Legacy'S mission of developing unique leadership potential through the traditional academia classrooms as well as through the arts and athletics in a safe learning environment.

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.

Legacys proposed budget provides for an annual 9-11% Operating Surplus available to fund the General Contingency Fund . It is anticipated that 80% of the surplus of each year's operations will be rolled over into the General Contingency Fund. Any school expenditures that necessitate utilizing the current year's surplus will be justified via a formal written operational and financial impact analysis as outlined above. Any expenditure that necessitate utilizing the General Contingency Fund will be justified via a formal written capital budget proposal.

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

The Legacy Board has structured the budget for Legacy to be able to fundamentally function on a "classic boot-strap basis" similar to any other well planned start-up enterprise. Any funding needs will be driven by absolute school need versus want to assure the best economic outcome for Legacy. With the exception of a multi-year lease/facility financing Legacy does not anticipate or need significant external financial resources prior to or after its commencement in September 2016.

Legacy's proposed budget reflects Legacy'S intent of opening in an existing

Legacy Academy of Charlotte - The mission of Legacy Academy is to instill in students a love of learning while engaging them through academic scholarship, strength-based leadership and character development, one child at a time.

temporary facility of approximately 30,000 square feet of leased space until it can otherwise acquire a permanent facility by year three. In an effort to manage facility costs, Legacy will seek to obtain a multi-year lease with a landlord which will provide lease escalators to reflect the increase in student enrollment and associated funding. Facility contingency plans as contemplated in the Facility Section of the application must also comply and operate within the proposed budget.

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*

The proposed Legacy budget assumes that all of the school's assets will be acquired/purchased with state and county allotted funds. To maximize these resources, Legacy will utilize surplus and reseller vendors to obtain office and classroom furniture. The Legacy Board reserves the right to further research and explore all options of fulfilling/supplementing its asset requirements, however the budget does not contemplate any outside sources for any assets on which the school's core operation depends.

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?

The Board of Directors of Legacy will explore and implement the best options for managing the business affairs of Legacy. At a minimum, the Legacy Board will implement best practice accounting, purchasing, payroll and audit policies and procedures (collectively "Business Affairs") as lead by the Board Treasurer and the outside advice of the prospective Legacy auditor until they formally become the auditor of Legacy. Such best practice Business Affairs will have specific metrics as developed within a Balanced Scorecard process/format that represent the key Business Affairs operations as regularly reported to the Legacy Board in its monthly board meetings. All subsequent development and implementation of Legacy Business Affairs policies and procedures will be carried out by the onsite Financial Officer of Legacy retained by the Legacy Board. The Legacy Board reserves the right to further research and explore all options for fulfilling Legacy Business Affairs on a best long term value basis. All Business Affairs options, selection criteria and selection processes will be done on a fully documented, comparative basis so as to assure best outcomes for Legacy. All Legacy financial and related Business Affairs activities will be done via the NC mandated ISIS financial system.

In accordance with North Carolina General Statutes, Legacy will adhere to reporting requirements established by the State Board of Education in the Uniform Education Reporting System by reporting at least annually to the State Board of Education via the Department of Public Instruction.

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

Legacy Board is unaware of any related party transactions at this time.

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.

We have identified two firms in our research. 1. Rives and Associates out of Raleigh, NC. 2. Potter and Company out of Concord, NC.

Section VI: Financial Plan Concerns and Additional Questions	Reviewer	Page Reference
<p>why are no raises included? What is the basis for the salary assumptions? why is the "lead administrator" salary so high? The lack of benefits and low compensation rates, it is questionable whether teacher will be attracted to such a complex program.</p>	Kristen Vandawalker	Personnel Bu
<p>Personnel numbers stay the same each year.</p>	Lisa Swinson	Personnel Bu
<p>Budget items do not include contracted services for related service providers-occupational therapists, speech/language therapists, physical therapists, etc. It is unclear where expenses for evaluations conducted by school psychologists are budgeted or needs for assistive technology/special equipment.</p>	Carol Ann Hudgens	Operations B
<p>What are the services for "other professional"? Facility amount is high.</p>	Lisa Swinson	Operations B
<p>what is the basis for the assumption that expenses will remain flat after student capacity is reached? how much paper can one but for \$15K? what is included in computers and software? what is the basis for the growth and decrease in this number? what is "other professional services?" What is "student accounting"? what is included in the maintenance and custodial lines? What is the basis for facility-related expenses and utilities flattening in years three and beyond? What are the buses for? what is the basis for the marketing expenditures? what is the basis for the dropoff in technology expenditures? what is included in the various "other" lines? why are there significant expenses related to technology when no significant technology component is included in the educational model? What are included in the instructional support and staff development lines? this seems very high given the limited time allocated for PD and the limited specific programs teachers will be learning. Why is there another \$18k+ of paper here?</p>	Kristen Vandawalker	Operations B
<p>The costs for instructional materials appears low. Question for interview: what materials does the board plan to purchase for K-6 in year one? Technology costs are very low.</p>	Kathryn Mullen Upton	Operations B
<p>See notes in previous section about curriculum and technology expenses.</p>	Kathryn Mullen Upton	Total Expend
<p>Student to teacher ratio is contrary to statements earlier in the application that mention 19 per class in K and 25 per class in the upper grades. The applicant states that it left federal dollars (IDEA excepted) out of the budget projections on purpose, thereby budgeting very conservatively.</p>	Kathryn Mullen Upton	Budget Narra
<p>The student teacher ratio is not the same as what is describe in the instructional section of the application.</p>	Lisa Swinson	Budget Narra
<p>No definitive contingency plans are presented. Additionally, to assert that student and staff preferences will not be taken into account when determining reductions demonstrates lack of experience or understanding of the impact of these decisions. The applicant does not demonstrate understanding of the cash flow of a school. Is there a basis for the assertion that compensation packages and leases can be changes retroactively? What does this mean: "Any other Legacy funding needs will be driven by absolute school need versus want so as to assure the best economic outcome for Legacy." These student/teacher ratios do not appear elsewhere? does this mean 40 teachers year 1?</p>	Kristen Vandawalker	Budget Narra

Legacy Academy of Charlotte - The mission of Legacy Academy is to instill in students a love of learning while engaging them through academic scholarship, strength-based leadership and character development, one child at a time.

<p>Are the student teacher ratios in Mecklenberg this low? Where is the master/apprentice teacher model described? how is it accounted for in the budget? How are the planned technology & curriculum uses "efficient?" What are the Gallup and covey related expenses? what is "high efficiency" teaching? What does this mean: "The Text and Technology as well as Support Costs (All fixed costs necessary to facilitating the teaching process) are complimentary expenditures that facilitate the teacher driven process yet can rarely supplant the actual classroom teacher experience."? What does this mean: The Legacy Board has structured the budget for Legacy to be able to fundamentally function on a "classic boot-strap basis" similar to any other well planned start-up enterprise. Any funding needs will be driven by absolute school need versus want to assure the best economic outcome for Legacy."</p>		
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Reviewer	Score
Joe Maimone	
Carol Ann Hudgens	
Kathryn Mullen Upton	Pass
Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Sherry Reeves	
Kristen Vandawalker	
Tammi Sutton	
Lisa Swinson	Pass

VII AGREEMENT PAGE

Application Fee:

Pursuant to § 115C-238.29B(e) the charter school applicant must submit a \$1000 application fee to the Office of Charter Schools. The applicant must submit their application fee by the September 26, 2014 5:00 pm EST deadline. Payments will be accepted in the form of a check or credit card. The Credit card Form is found on the Office of Charter Schools website. Cash is not accepted.

**Application Note: The applicant must mail the check or credit card form along with a letter indicating the name of the proposed charter school, contact information, and the enclosed payment amount to be received before or on the due date of September 26, 2014 5:00 pm EST. Failure to submit payment by the stipulated timeline to the Office of Charter Schools will deem the application incomplete.*

Payments should be made payable to North Carolina Department of Public Instruction

*North Carolina Department of Public Instruction
Office Of Charter Schools
6303 Mail Service Center
Raleigh, NC 27699-6303*

I understand the requirements pursuant to G.S. 115C-238.29B(e).
legacyacademy Date: 09/26/2014

Applicant Signature:

The foregoing application is submitted on behalf of Legacy Academy of Charlotte (*name of non-profit corporation or individuals submitting application*). The undersigned has read the application and hereby declares that the information contained in it is true and accurate to the best of his/her information and belief. The undersigned further represents that the applicant has read the Charter School Law and agrees to be governed by it, other applicable laws, and SBE regulations.

Print/Type Name: legacyacademy

Board Position: Dr. Kenneth Benton, Chair

Signature: _____

Date: 09/26/2014

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

Notary Public Official Seal

My commission expires: _____, 20____.

OVERALL ASSESSMENT

Would you as the Advisory Board deem this application complete? The decision of the Advisory Board regarding completeness is final. This rubric, and the following recommendation, is simply a starting point for Advisory Board deliberations regarding which applicants to invite back for an interview.

<u>Total Initial Screening Votes</u>	
No	Yes
0	11 AH, JM, PG, HN, SR, AQ, ES, TS, BT, CT, SW

Would you, as an external evaluator, recommend an interview for this application? Remember that an external evaluator has no authority to bind the Advisory Board to a particular recommendation. This rubric, and the following recommendation, is simply a starting point for subcommittee and Advisory Board deliberations regarding which applicants to invite back for an interview.

<u>Total External Evaluator Votes</u>	
No	Yes
3	0

Would you, as an Advisory Board, recommend this nonprofit group to the SBE to start the Planning year? The State Board of Education gives the final approval to start the Planning Year.

<u>CSAB Votes</u>	
No	Yes

Summary comments are to be provided in the appropriate section detailing the findings and/or concerns of the Public Charter School Advisory Council subcommittee.

<u>Initial Screening</u>

Legacy Academy of Charlotte - The mission of Legacy Academy is to instill in students a love of learning while engaging them through academic scholarship, strength-based leadership and character development, one child at a time.

Mission, Purposes, and Goals	- lsswinso
Education Plan	- lsswinso
Governance and Capacity	- lsswinso
Operations	- lsswinso
Financial Plan	- lsswinso
OVERALL	- dtsmith840 - lsswinso - lsswinso

External Evaluator

Mission, Purposes, and Goals	<p><u>Mission Statement</u> What is a "high yield" instructional strategy? Is this meant to be a classical school? Significant grammar/punctuation/typo issues. - kvandawalker</p> <p><u>Mission Statement</u> The mission is vague and the description of the mission seems to be disconnected from the mission. - lsswinso</p> <p><u>Educational Need and Targeted Student Population</u> No rationale for targeting these students is provided. Are these students actually in need of another option? What research supports use of Gallup's Strengths Based Leadership at the elementary school level? has this been successful in other schools? Is the argument that other than programs for AIG identified students, the whole LEA is weak and does not focus on academics? What are the "comparable existing schools?" Appendix A does not demonstrated academic need or sufficient demand for growth. Only ~100 responses were recieved. they do not indicate a significant base of interested families to meet the projected 700 students in year 1. the survey was distributed to only 181 families, too small a sample size to determine actual community support. - kvandawalker</p> <p><u>Educational Need and Targeted Student Population</u> The targeted student population is not clear. The narrative in this section mentions AIG students, and notes there is only one other area school dedicated to this population. The mission does not discuss gifted, nor does the application specifically state that Legacy Academy is for gifted students.</p> <p>As mentioned previously, the small sample size from the survey is insufficient to demonstrate need. Additionally, if the proposed school is planning to focus on gifted</p>
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	<p>students, no evidence of educational need for this population was present in Appendix A1.</p> <p>- kmullenupton</p> <p><u>Educational Need and Targeted Student Population</u></p> <p>The applicant provided survey information for a small sample of families, 81, for an area with over 46,000 people. The evidence that was provided was not a clear rationale for selecting the location and targeted student population. The applicant provided census information for the area, which was not compelling evidence that another charter is needed for the area. The education plan eludes to the school providing an academic emphasis for AIG students. This is the first time that this is mentioned and does not align with the targeted population description provided or the mission statement. The targeted population is all students in the area.</p> <p>- lsswinso</p> <p><u>Purposes of Proposed Charter School</u></p> <p>Are there no schools using CK sequence in the area? Will parents understand the benefits of the Callup and Covey principles? How will children be assessed on the Gallup scales, this test is not designed for children.</p> <p>it is unclear how the bulleted items differentiate this school.</p> <p>Will the school purchase curricular products or develop their own? this is a critical distinction.</p> <p>how does technology fit into the mission of the school?</p> <p>How will students make choices about their own experience? - kvandawalker</p> <p><u>Purposes of Proposed Charter School</u></p> <p>While the application states that the proposed school will provide parents and students with expanded choices and different educational opportunities than those that currently exist, the narrative contains almost little detail to support that assertion. The application states that it will offer Core Knowledge in combination with Gallup Strength Finders and Covey Leadership Principles; however, there is no detail as to how these programs (1) will be used together, or (2) will be effective when used together.</p> <p>Additionally, many of the general information contained in the bullet points included in this section are often available within most public school systems.</p> <p>The narrative does not address improving student outcomes. - kmullenupton</p> <p><u>Goals for the Proposed Charter School</u></p> <p>It appears that the school will use two systems to monitor/measure success: Balanced Scorecard, and the School Improvement Plan.</p> <p>Two evaluation systems could be problematic; please see questions below.</p> <p>Questions: how do these systems work together? Do they have measures that overlap and/or potentially contradict each other? Why have two evaluation systems?</p> <p>Additionally, there do not appear to be any student growth goals; rather, just end-of-grade goals. If the focus is engagement, one would expect to see a growth measure as an indicator of engagement. And, if the school is focused on gifted, growth goals are quite important to demonstrating progress and showing improved student outcomes. - kmullenupton</p>
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	<p><u>Goals for the Proposed Charter School</u> Goals are not presented in SMART terms. Overall, the goals lack rigor and purpose and are not measurable. How will "engagement" be measured? Why will it grow 5% annually from BOY to EOY, this seems like a low goal? shouldn't 100% of students be "engaged"? Completing required PD is not a goal. How many "Habits" are there? 7 or 8? What is the logic for the 90% goals? why are there no goals for out years? Why are no nationally normed assessments included? is it Level III or Level 111? Why does goal four address only three grade levels? How does community service fit with the rest of the program? Not clear what goal 5 is trying to say. Do other schools use the Balanced Scorecard? is this a vendor product or just a set of business principles? How and what does it measure? What are the inputs and outputs? Who develops and monitors the SIP? What are the inputs and outputs? who is held accountable for progress? What is the basis/threshold for "a positive yield of student achievement for the respective investment?" - kvandawalker</p> <p><u>Goals for the Proposed Charter School</u> The applicant did not provide baseline academic or community data, in this section or previous sections, to establish whether these goals are achievable. The board will use academic data from the State. This will not be available until the end of the school year. - lsswinso</p>
<p>Education Plan</p>	<p><u>Instructional Program</u> The narrative indicates that the school will use Core Knowledge, but does not discuss the previously mentioned Gallup and Covey components, which appear integral to the proposed design.</p> <p>There is mention of "research-based, teacher-tested Core Knowledge ..." yet there is not evidence included that the proposed approach will lead to improved student performance for the targeted population. - kmullenupton</p> <p><u>Instructional Program</u> Why are there no apostrophes in the document? What schools using classical curriculum and models did the Legacy team visit? What curricular products will be used? how does the classical model integrate with the Gallup/Covey model? If this is a classical school, why are the elements of the trivium not discussed and why is there no vision for how the other model elements will evolve as students progress through grades? What are the "specialized instructional strategies and core beliefs?" Core Knowledge is a sequence of topics. what curriculum will be used? what schools are using CK and classical structure? What is the rationale for the assumption that students will not have access to resources/literature? What is the "specialization in music and art?" What does this statement mean: "Every child should learn the fundamentals of science, basic principles of government, important events in world history, essential elements of mathematics, widely acknowledged masterpieces of art and music from around the world?" By eighth grade, shouldn't student be well past "fundamentals" and "basics"? - kvandawalker</p>

	<p><u>Instructional Program</u> Applicant does not provide a clear and coherent description of the instructional program in this section. Instructional methods are not described, rather components of Core Knowledge are presented. Further, there is no information regarding how this program will lead to improved student performance for the targeted population. The application only stated that other schools have had success. - lsswinso</p> <p><u>Curriculum and Instructional Design</u> There is not much detail regarding the basic learning environment other than class size and teacher aides for K-2.</p> <p>Class sizes start at 19 in kindergarten and grow to 25 in the upper grades; however, there is no breakout provided. Additionally, this information is contrary to information contained in paragraph 3 of this section, which states that small school and small class sizes will be part of the learning environment. (School size is 700 initially, 900 at capacity.)</p> <p>There is no mention of Gallup/Covey in the narrative or in Appendix B.</p> <p>The academic calendar is very general and contains teacher workdays and holidays only (e.g., no assessment, no specific plans for teacher workdays, etc). The calendar does not address instructional days or hours. - kmullenupton</p> <p><u>Curriculum and Instructional Design</u> Where will the extra six students per classroom in grade one come from in years two and beyond? What types of support do the TAs provide? is AB Combs a classical school? Do they use Core Knowledge? Are the student populations similar? What is the success of the school mentioned here? What are the measures and the rationale for this assertion? How large are other area schools? What is the basis for calling a school of 900 students "small?" How large are classrooms in other area schools? what is the basis for asserting that these class sizes are small? Generally, class size makes little difference until you dip below a 17:1 ratio. How do the 10 elements named work together? this seems like a kitchen sink approach. No actual curriculum is discussed, nor is development of standards and CK-aligned curricula. Instructional strategies are not discussed. Curriculum maps are tools. What is the basis for asserting that children in other area schools have a deficit of speaking and listening instruction? Why does the school seek to create "middle school ready students" when they will serve MS grades? Providing a CK-developed document is insufficient and shows lack of understanding and ability to develop curriculum maps. this document does not address skills and standards appropriately. What is the rationale for providing only four days of teacher induction? what is to be accomplished during the teacher workdays? are these aligned with testing or report card days? - kvandawalker</p> <p><u>Curriculum and Instructional Design</u> Appendix B is a copy of the Scope and Sequence of Core Knowledge. Will this be the only instructional tool used? Instead of describing the primary instructional strategies and</p>
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	<p>learning environment the applicants have provided research information about the Core Knowledge program. It appears that this section was take directly from the Core Knowledge handbook/basal. Calendar provides a Teacher Workday approximately one day per month. Narrative for calendar is vague. - lsswinso</p> <p><u>Special Programs and "At-Risk" Students</u> There is not a sound plan for identification, prevention and intervention for all students; rather, there is a very general statement that the school will use Response to Intervention (RTI). There is no detail on how, specifically, RTI will be implemented in the proposed school.</p> <p>Regarding ELL students, the school will use DIBELS for students in K-6 to identify those that may qualify as ELL in year one of operation. The narrative then states that other methods will be used with older students in subsequent years, but does not those methods. There was no mention of strategies other than DIBELS (e.g., surveys).</p> <p>The plan does not detail specific instructional programs that the school will use with ELL students. The plan does not demonstrate capacity to meet state and federal requirements for ELLs.</p> <p>- kmullenupton</p> <p><u>Special Programs and "At-Risk" Students</u> This section is wholly undeveloped. No understanding of RTI is demonstrated. No understanding of the needs of ELLs or LEPs is demonstrated. Why are WIDA an a home-language survey not discussed? In year one, All students up to grade 6 will be scteened using DIBELS? How will DIBELS results identify ELLs? Will students not under RtI monitoring not be given a DIBELS assessment at EOY? No ELL curricula or specific plans are included. The applicant demonstrates insufficient understanding of the needs of ELLs to fully meet FAPE requirements and fulfill public school obligations. What is the IAT, and who are its members? what is "regularly sxcheduled, if not 1-2 times per month? No clear plan for addressing the needs or differentiating for AIG students is presented. What is the rationale for assuming that multi-age classes or grade skipping will be possible. - kvandawalker</p> <p><u>Special Programs and "At-Risk" Students</u> Applicants did not included State and federal mandates for serving ELL. - lsswinso</p> <p><u>Exceptional Children – Identification and Records</u> Questions for interview: please describe the security procedures for the electronic records of students with disabilities and 504 plans. - kmullenupton</p> <p><u>Exceptional Children – Identification and Records</u> How is the IEP/504 team different from the IAT team? How will MAP identify students in need of SpEd services? This is the first time MAP is mentioned, which indicates lack of understanding of the purpose and value of this tool. It does not appear that the applicant understands or can uphold the responsibilities of a public school meeting FAPE requirements. - kvandawalker</p> <p><u>Exceptional Children – Identification and Records</u></p>
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	<p>Applicant does not demonstrate an understand of state and federal requirements regarding EC: Students who are enrolled and have previously been identified and found eligible for special education services do not need to be referred. Child Find mandate is not accurately described for students who may be eligible. - lsswinso</p> <p><u>Exceptional Children – Education Programming</u> The response in question one did not fully articulate the full continuum of services. Further responses indicate that students with disabilities would be served in class. It is unclear if this is meant to be within the general education setting or within resource or separate settings. Responses regarding supports and services for students with disabilities were unclear. - carolann_hudgens</p> <p><u>Exceptional Children – Education Programming</u> The application states that students with disabilities will be automatically assigned to RTI tiers two or three; however, the application does not detail what comprises those tiers. Without more specific information on the tiers, it is difficult to determine alignment with the curriculum, instructional methods and mission, as well as whether a full range of programs and services exists.</p> <p>It is unclear why all students with IEPs will be automatically assigned to tiers two or three. Question: why are students automatically assigned to those two in particular? What if a student only needs tier one interventions?</p> <p>- kmullenupton</p> <p><u>Exceptional Children – Education Programming</u> It is unclear how the school foresees using RTI to provide or supplement SpEd services. This section is wholly undeveloped and does not inspire confidence that the applicant understands or is prepared to serve students with a range of needs, including low-incidence disabilities. staff involved in the various student service teams changes from section to section. it is not clear how student's rights will be protected or how accountability will be assigned and enforced. - kvandawalker</p> <p><u>Exceptional Children – Education Programming</u> Because the school will be K-8, there is not need for the applicant to expound on the services of students ages 14 and up. - lsswinso</p> <p><u>Student Performance Standards</u> The narrative did not expound on the academic goals in question 2.</p> <p>While the narrative references three assessments (DIBELS, MAP, and state assessments), there is not detail that evidences how the use of these assessments will result in data that will drive instruction.</p> <p>While the promotions standards are clear, they are low, and not indicative of a rigorous instructional program.</p> <p>- kmullenupton</p> <p><u>Student Performance Standards</u> this section is wholly undeveloped and in many cases the questions are not answered in sufficient detail for evaluation.</p>
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	<p>Why would students with a D average be able to be promoted. Will this not, after even one year, create a culture of low expectations and a student body that is multiple grade levels behind? Is it even possible for student to pass the EOG tests and have a grade as low as a D? What is the basis for believing that these practices are appropriate and will push students to achieve? No actual promotion standards or graduation requirements are presented. - kvandawalker</p> <p><u>Student Conduct and Discipline</u> The discipline policy does not align with the narrative, and in some cases offers conflicting information. For example, the narrative indicates a Class I violation may result in an in-school suspension, but Attachment D (Student Handbook) states Class I violations may result in out-of-school suspensions.</p> <p>Similarly, the narrative states that Class II violations will result in suspensions up to 5 days, yet Attachment B states the suspensions may be up to 10 days.</p> <p>While there is reference to appeals, there is no appeal process set forth, and no procedural information (e.g., timelines regarding notice, hearing, decision, etc) was included.</p> <p>A very broad reference to IDEA was included regarding students with disabilities; no detail was included that would inform parents of student rights in these cases. - kmullenupton</p> <p><u>Student Conduct and Discipline</u> There are no references to the discipline of students with disabilities and the requirement to provide services in the event that a disciplinary removal results in a change in placement. It is highly recommended that the applicant review the NC Policies Governing Students with Disabilities. - carolann_hudgens</p> <p><u>Student Conduct and Discipline</u> This section does not address the standards as presented. There is no plan for setting a positive culture or promoting good behavior, nor is an approach to discipline outlined. It is not clear what Appendix D actually is, it appears to be a conglomeration of a number of documents. It appears that student conduct will be "graded." other than a scale (S/N/U), no parameters or description is provided. Why would the Board be involved in issues with "recurring late student pickups?" this is a management issue. Failure to present immunization records results in suspension? This is a disciplinary action, shouldn't it be exclusion or some other non-punitive/recorded action? How does the dress code "help students and faculty detect those who should not be at the school?" Is it legal to require that students "dress gender appropriate?" How would clothing constitute a "threat to health or safety?" Why will there be no cafeteria? What extra provisions will be made for student health if lunch and snacks are eaten in the classroom. How will FRL eligible students be provided for? Why is the board involved in determining fees for extracurriculars? The discipline guidelines are underdeveloped and unreasonable. There is a heavy reliance on out-of-school offenses and it appears that the school intends to push out students it deems unworthy. VERIFY that the student handbook is not plagiarized in whole or part, this appears to be a poorly executed cut-and-paste. Additionally, it references New Jersey law. - kvandawalker</p>
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	<p><u>Student Conduct and Discipline</u> Discipline policy in the handbook does not align with narrative. - lsswinso</p>
Governance and Capacity	<p><u>Tax-Exempt Status 501 (c)(3)</u> The application did not include Appendix E. It is possible that tax exempt status is pending, but the application did not include any information regarding a possible pending status. Question for interview: what is the status of the application for 501(c)(3) status? - kmullenupton</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> The narrative does not discuss the educational consultant in detail, yet the position is included in the organization chart. Question for interview: what is the purpose of the consultant? What is the scope of services? Who is the consultant, and what was the process via which that individual was selected?</p> <p>A potential concern in the organization chart is that teachers appear to report to three entities: all operating committees, all grade level chairs, and the academic director.</p> <p>The bylaws seem unusually detailed and prescriptive on several matters: hiring procedures for the Managing Director (including that person's term of service) (Art. IV); consequences for surreptitious communications (Art. IV); detailed procedures for arbitration; requirements for action items (H5); 2 successive public readings for all action items (H6); time-frame of 10 minutes per action item (H6); marketing plan for \$10M enterprise. In brief, the bylaws seem to get into numerous areas that are better suited to board policy or a strategic plan.</p> <p>Multiple positions contained in the subsequent section on staffing are not included in the organization chart: Finance Director, Clerical (2), Food service, Guidance, Office Manager, Custodian, Maintenance, Aides, Media. - kmullenupton</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Why are only two members required to live in Mecklenburg country? This section is vague and poorly organized. It does not appear that the applicant understands the accountability required of the governing board, nor their responsibilities to the students and taxpayers. Who is the "educational consultant?" What is the role of this person? How will this person be identified and paid? This section is wholly underdeveloped and appears to conflate the roles of board and staff. I'm not sure I understand all of the provisions around the MD in Article 4, or it may just be that they aren't best practice. Why does the board have power over staffing decisions? Why is a 5% contingency sufficient? Why are so many specific provisions in the bylaws? OML provisions are weak/vague, and the contingency spending rule seems to defy the purpose of having a contingency fund as it cannot be spent without a supermajority vote. Article 5 seems to overregulate the board without establishing basics like size range. Unclear if the bylaws were "adapted" or plagiarised. Where is Wake County? No clear plan or process for board growth or development is presented. Why is the service term October-September? Committee structure seems overambitious for a startup school with such a small board? Why does the executive committee handle marketing and recruitment and what is this \$10M in revenue about? Academic committee duties seem to move into the realm of management.</p>

	<p>Why is a board signature required on all checks? Does this affect the school's ability to nimbly address financial commitments?</p> <p>The organizational chart is difficult to understand. What is the advisory board, and what is its purpose? what is purpose and role of the educational consultant? why does the managing director oversee the committees? to whom are the teachers actually accountable?</p> <p>Background forms indicate board members lack knowledge, expertise, and understanding of their roles and are not prepared or qualified to govern a school. - kvandawalker</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u></p> <p>Board has listed specific roles. The Legacy Operating Committee appears to be dealing with the day-to-day operations of the school. The organizational chart mentions a consultant. There is no mention of the consultant in the narrative. Although the applicants state that background checks were performed and there were no findings, there is no evidence of this.</p> <p>Board members do not have to live in the area. One member is located out of state. - lsswinso</p> <p><u>Projected Staff</u></p> <p>is this list for year one or capacity?</p> <p>what is the rationale for the three leader model?</p> <p>why are all of these positions, e.g. the fonancial officer and guidance counselor, included in the org chart?</p> <p>Are there 7 teacher assistants as described earlier, or 8?</p> <p>what is the difference between maintenance and custodial? what do the 7 specials teachers and the media specialist do?</p> <p>what is the role of the guidance counselor?</p> <p>why is there a food service staff member if all students must bring food from home? - kvandawalker</p> <p><u>Staffing Plans, Hiring, and Management</u></p> <p>There is no information on how the school will retain high performing staff members.</p> <p>- kmullenupton</p> <p><u>Staffing Plans, Hiring, and Management</u></p> <p>this section is wholly undeveloped and indicates lack of understanding of the gravity and difficulty of executing a teacher search. No actual recruitment or retention plan is provided. No interviews, sample lesson plans or mock teaching or classroom recordings are required.</p> <p>The compensation information is to vague to fully evaluate and the te rnages may not be competitive with the local market. it is unclear if the benefits will ve school-funded or employee funded.</p> <p>These is no "exceptional children's coordinator" in the staff list?</p> <p>The staff policies are poorly pasted together and redundant. - kvandawalker</p> <p><u>Staff Evaluation and Professional Development</u></p> <p>There is no evidence set forth in this section that the professional development in Gallup seminars and/or Covey Leadership will support effective implementation of the school's mission.</p> <p>Regular evaluation consists of "evaluat[ing] teachers by regular classroom visitations" yet there is no detail on what exactly the evaluation process, tools, observations, or feedback</p>
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	<p>cycle look like.</p> <p>None of the pre-opening professional development is included in the calendar attachment.</p> <p>There is not a professional development line in the operating expenditure budget, although there is a line for instructional support. Question for interview: what comprises the expenses within the instructional support category? How do they support the pre-opening professional development and that which will occur throughout the year? - kmullenupton</p> <p><u>Staff Evaluation and Professional Development</u> Master teacher/new teacher pairing is not mentioned previously. It appears that the applicant does not understand the difference between "core" classes and specials. this section is wholly underdeveloped. no actionable PD plan is presented. no PD around core knowledge or the classical trivium is discussed. it is unclear who will manage teacher gallup assesments and provide gallup-based PD, or how this relates to improving teacher quality. PBL is not mentioned prior to now, nor are the other five instructional strategies. No PD time is allocated for new teacher development or classroom management, specified instructional methodoligies, culture or team building, discipline norming, etc. - kvandawalker</p> <p><u>Staff Evaluation and Professional Development</u> What evaluation instrument will be used to evaluate teachers? - lsswinso</p> <p><u>Marketing Plan</u> No marketing plan was attached. The narrative made broad reference to a plan, which included Facebook, a school website, print media, radio, community meetings and word of mouth. The narrative indicates the bulk of marketing expenses will be social media. The operations budget includes \$12K for the entire marketing strategy, which seems low for a new charter school seeking to enroll 700 students on day one. - kmullenupton</p> <p><u>Marketing Plan</u> this section is wholly insufficient and does not contain enough content to fairly evaluate. - kvandawalker</p> <p><u>Marketing Plan</u> \$12,000 is allocated for the first 2 years. - lsswinso</p> <p><u>Parent and Community Involvement</u> The engagement plan is very similar to the marketing plan, with the exception of adding a volunteer component. There does not appear to be a targeted strategy to build and sustain parental engagement as one typically sees in start-up schools (e.g., door-to-door campaign, phone strategy, teacher engagement, etc). - kmullenupton</p> <p><u>Parent and Community Involvement</u> no actionable plan for community engagement or parental involvement is presented. - kvandawalker</p> <p><u>Parent and Community Involvement</u> Parent conferences can not be made mandatory. - lsswinso</p> <p><u>Admissions Policy</u> Where is Iredell County? Shouldn't the forms be in Mecklenberg county? Why is the MD</p>
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	<p>responsible for processing applications? shouldn't this be a business or clerical task? This section is minimally developed, it is unclear whether it complies with state law. It is unclear which enrollment priorities the school will use. It is unclear how these would work with the lottery. - kvandawalker</p> <p><u>Projected Student Enrollment (Table)</u> it is unclear whether the school will be able to identify and recruit sufficient students, especially above second grade, to meet these numbers and backfill for attrition in out years. It is unclear why these numbers do not align with proposed class sizes (19 students for K, 26 by 8?) - kvandawalker</p> <p><u>Projected Student Enrollment (Table)</u> As stated earlier, several schools in the area have not be able to make acquire the number of students that were predicted. - lsswinso</p>
<p>Operations</p>	<p><u>Transportation Plan</u> The plan is to facilitate carpool groups, but there is no detail on how the board will execute this strategy. Additionally, it is likely, in a 700-900 student school, that more than fifty students will need transportation. Question for interview: please discuss in further detail how the board will execute this strategy. Please also discuss how the school will fund transportation in the event more than fifty students (likely in a 700 - 900 students school) will need transportation. - kmullenupton</p> <p><u>Transportation Plan</u> How will the applicant provide special transportation for students with disabilities that require it as a related service on the IEP? - carolann_hudgens</p> <p><u>Transportation Plan</u> There is no evidence that the school will accept all students, nor is it believable that transportation will not be an obstacle for attendance. - kvandawalker</p> <p><u>Transportation Plan</u> Information about the schools transportation plan should be included in marketing. If a decision will be made after enrollment, there are some students who will miss the opportunity to attend the school. - lsswinso</p> <p><u>School Lunch Plan</u> It will likely be difficult to rely solely on parent volunteers to staff lunch daily for a 700-900 student school.</p> <p>With no cafeteria and no food service infrastructure, it's unclear how even with a vendor the school will provide hot meals. At least some food service equipment will likely need to be purchased. - kmullenupton</p> <p><u>School Lunch Plan</u> this section is underdeveloped and contradictory. - kvandawalker</p> <p><u>Civil Liability and Insurance</u> why is their quote almost double the others i have seen so far? - kvandawalker</p> <p><u>Healthy and Safety Requirements</u> Board chair did not sign. Signed by "legacy academy". - lsswinso</p> <p><u>Facility and Facility Contingency Plan</u> How are the architect, RE vendor, and legal counsel currently being paid?</p>

	Why is - kvandawalker
Financial Plan	<p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> why are no raises included? What is the basis for the salary assumptions? why is the "lead administrator" salary so high? The lack of benefits and low compensation rates, it is questionable whether teacher will be attracted to such a complex program. - kvandawalker</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> Personnel numbers stay the same each year. - lsswinso</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> The costs for instructional materials appears low. Question for interview: what materials does the board plan to purchase for K-6 in year one? Technology costs are very low. - kmullenupton</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> Budget items do not include contracted services for related service providers- occupational therapists, speech/language therapists, physical therapists, etc. It is unclear where expenses for evaluations conducted by school psychologists are budgeted or needs for assistive technology/special equipment. - carolann_hudgens</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> what is the basis for the assumption that expenses will remain flat after student capacity is reached? how much paper can one but for \$15K? what is included in computers and software? what is the basis for the growth and decrease in this number? what is "other professional services?" What is "student accounting"? what is included in the maintenance and custodial lines? What is the basis for facility-related expenses and utilities flattening in years three and beyond? What are the buses for? what is the basis for the marketing expenditures? what is the basis for the dropoff in technology expenditures? what is included in the various "other" lines? why are there significant expenses related to technology when no significant technology component is included in the educational model? What are included in the instructional support and staff development lines? this seems very high given the limited time allocated for PD and the limited specific programs teachers will be learning. Why is there another \$18k+ of paper here? - kvandawalker</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> What are the services for "other professional"? Facility amount is high. - lsswinso</p> <p><u>Total Expenditure Projections (Table)</u> See notes in previous section about curriculum and technology expenses. - kmullenupton</p> <p><u>Budget Narrative</u></p>

	<p>Student to teacher ratio is contrary to statements earlier in the application that mention 19 per class in K and 25 per class in the upper grades.</p> <p>The applicant states that it left federal dollars (IDEA excepted) out of the budget projections on purpose, thereby budgeting very conservatively. - kmullenupton</p> <p><u>Budget Narrative</u> No definitive contingency plans are presented. Additionally, to assert that student and staff preferences will not be taken into account when determining reductions demonstrates lack of experience or understanding of the impact of these decisions.</p> <p>The applicant does not demonstrate understanding of the cash flow of a school. Is there a basis for the assertion that compensation packages and leases can be changes retroactively? What does this mean: "Any other Legacy funding needs will be driven by absolute school need versus want so as to assure the best economic outcome for Legacy." These student/teacher ratios do not appear elsewhere? does this mean 40 teachers year 1? Are the student teacher rations in Mecklenberg this low? Where is the master/apprentice teacher model described? how is it accounted for in the budget? How are the planned technology & curriculum uses "efficient?" What are the Gallup and covey related expenses? what is "high efficiency" teaching?</p> <p>What does this mean: "The Text and Technology as well as Support Costs (All fixed costs necessary to facilitating the teaching process) are complimentary expenditures that facilitate the teacher driven process yet can rarely supplant the actual classroom teacher experience."?</p> <p>What does this mean: The Legacy Board has structured the budget for Legacy to be able to fundamentally function on a "classic boot-strap basis" similar to any other well planned start-up enterprise. Any funding needs will be driven by absolute school need versus want to assure the best economic outcome for Legacy." - kvandawalker</p> <p><u>Budget Narrative</u> The student teacher ratio is not the same as what is describe in the instructional section of the application. - lsswinso</p>
<p>OVERALL</p>	<p><u>Cover Page</u> What is the rationale for working with the Bridgewoods Foundation? What are their qualifications to provide support. - kvandawalker</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> It's unclear whether the enrollment figures are realistic. Only seventy survey respondents submitted information, which is insufficient to show that enrollment numbers are realistic. - kmullenupton</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> What is the rationale for such a large school? What evidence supports the assumption that a large number of students in grades 3-6 can be recruited? What is the rationale for starting a new school with such a large grade span? - kvandawalker</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> There are currently 21 charter schools located in the LEA that this applicant is proposing. Of these 21 schools, 11 of them did not reach at least 80% of their projected enrollment for the 2014-15 school year. - lsswinso</p> <p><u>Signature Page</u> Signed by "legacy academy". - lsswinso</p>

Legacy Academy of Charlotte - The mission of Legacy Academy is to instill in students a love of learning while engaging them through academic scholarship, strength-based leadership and character development, one child at a time.

Charter School Advisory Board Subcommittee	
Mission, Purposes, and Goals	
Education Plan	
Governance and Capacity	
Operations	
Financial Plan	
OVERALL	

Overall Summary	
Initial Screening	The Office of Charter Schools deems this application complete.
10/20/2014	The CSAB voted unanimously to deem this application complete on November 14, 2014.
Application Review	<p>On February 9, 2015 the CSAB subcommittee voted to deny this application to interview. The subcommittee vote was 5 to 0 with Mr. Maimone abstaining. The full CSAB vote was 11 to 0.</p> <p>Concerns outlined consisted of the following: Enrollment 700 students. Funding for AIG students appears the applicant believes that EC will fund AIG. Explanations are very broad.</p> <p>During the full CSAB meeting, Ms. Nance made the motion to deny this application for interview. Mr. Maimone made the second.</p>
Application Interview	
OVERALL	On February 9, 2015 the CSAB subcommittee voted to deny this application to interview. The subcommittee vote was 5 to 0 with Mr. Maimone abstaining. The full CSAB vote was 11 to 0.