

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.

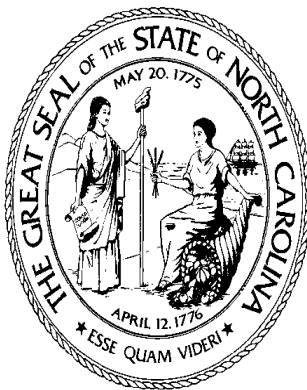
Subcommittee Members:

Cheryl Turner
Joe Maimone
Amy Ruck Kagan
Becky Taylor
Eric Sanchez
Helen Nance
Mike McLaughlin
Marie Massengill
Sherry Reeves
Tammi Sutton
Greg Schermbeck
Tracy Kelley
Alan Hawkes
Steven Walker
Cande Honeycutt
Phyllis Gibbs

Date of Review:

Lionheart Charter Academy - To develop diploma seeking students with Autism Spectrum Disorders into independent adults through research based education strategies designed to increase academic and social success.

10/24/2014



NORTH CAROLINA CHARTER SCHOOL APPLICATION

Lionheart Charter Academy

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: *Lionheart Charter Academy*

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: *Lionheart Charter Academy*

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

Name of contact person: *Heather B.Pardue*

Title/Relationship to nonprofit: *President*

Mailing address: 3903 Katie Dr.
Greensboro NC 27410

Primary telephone: 336-908-1074 Alternative telephone: 336-638-5251

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

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

County: *GUILFORD*

LEA: *410-Guilford County Schools*

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

No:

Yes:

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*

Lionheart Charter Academy -To develop diploma seeking students with Autism Spectrum Disorders into independent adults through research based education strategies designed to increase academic and social success.

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>
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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? Lionheart Charter Academy

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

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2016 Month August

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	06,07,08,09,10	75
Second Year	06,07,08,09,10,11	90
Third Year	06,07,08,09,10,11,12	105
Fourth Year	06,07,08,09,10,11,12	120
Fifth Year	06,07,08,09,10,11,12	135

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 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.

Lionheart Charter Academy - To develop diploma seeking students with Autism Spectrum Disorders into independent adults through research based education strategies designed to increase academic and social success.

lionheart
Signature

Heather B. Pardue, President
Title

lionheart
Printed Name

09/24/2014
Date

Section I: Application Contact Information Concerns and Additional Questions	<u>Reviewer</u>	<u>Page Reference</u>
<u>No evidence presented that the school would be able to fill enrollment. Grade levels proposed, targeted population, and school size pose issues with budgeting and appropriate licensure and provision of services.</u>	<u>Cande Honeycutt</u>	<u>Grade Levels</u>
<u>Projected enrollment figures are not realistic given (year 1-5) the staff necessary to operationalize the proposed school design in terms of staff to student ratio.</u>	<u>Tracy Kelley</u>	<u>Grade Levels</u>
<u>15 students per grade level is incredibly small. It is unclear how the school can become financially stable with only 15 students per grade level or 75 students across 5 grade levels.</u>	<u>Greg Schermbeck</u>	<u>Grade Levels</u>
<u>unsure if projections are realistic</u>	<u>Amy Ruck Kagan</u>	<u>Grade Levels</u>

<u>Reviewer</u>	<u>Score</u>
<u>Cheryl Turner</u>	
<u>Joe Maimone</u>	
<u>Amy Ruck Kagan</u>	<u>Pass</u>
<u>Becky Taylor</u>	
<u>Eric Sanchez</u>	
<u>Helen Nance</u>	
<u>Mike McLaughlin</u>	
<u>Marie Massengill</u>	
<u>Sherry Reeves</u>	
<u>Tammi Sutton</u>	
<u>Greg Schermbeck</u>	<u>Pass</u>
<u>Tracy Kelley</u>	<u>Fail</u>
<u>Alan Hawkes</u>	
<u>Steven Walker</u>	
<u>Cande Honeycutt</u>	<u>Fail</u>
<u>Phyllis Gibbs</u>	

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:

To develop diploma seeking students with Autism Spectrum Disorders into independent adults through research based education strategies designed to increase academic and social success.

Clearly describe the mission of the proposed charter school:

Individuals with Autism Spectrum Disorder have different learning needs that exceed the typical school environment. Independence can be achieved post high school using programming developed to address their specific needs. Learning is a behavior. As a result, research based strategies such as Applied Behavior Analysis (ABA) and Social Thinking (developed by Michelle Garcia Winner) will drive individualized instruction and programming used throughout their education.

Educational need and Targeted Student Population of the Proposed Charter School:

- 1. Provide a description of Targeted Population in terms of demographics. In your description, include how this population will reflect the racial and ethnic composition of the school system in which it is located. Describe the rationale for selecting the location and student body.*

The Centers for Disease Control (CDC) has an Autism and Development Disabilities Monitoring (ADDM) network. The data they have collected show the estimated number of children identified with Autism Spectrum Disorder (ASD) is about 1 in 68 and almost half of the children with ASD have average to above average intellectual ability. The CDC has requested people in communities across the United States to use the ADDM to raise awareness and take action to help these children. This application is our way of helping those children with ASD that have the ability to earn a diploma, become independent adults by providing them with a comfortable school environment from which to learn.

According to the CDC, Autism is a developmental disability that is caused by differences in how the brain functions. People with ASD may communicate, interact, behave and learn in different ways. They may have difficulties with social interaction, communication and highly focused interests or repetitive activities. (www.cdc.gov) The board members of Lionheart Charter Academy believe that the education plan and overall school environment will allow us to focus on these differences and help the children develop skills to allow them to be as successful in life as their peers without Autism.

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Autism impacts all racial, ethnic and socioeconomic groups. The ADDM reported statistics obtained in 2010 showing 1 in 58 children identified with ASD in North Carolina. This estimate is higher than the average number of children in all areas of the United States where the CDC tracks ASD (www.cdc.gov). In NC, the prevalence of ASD according to race is as follows: 1 in 53 white children, 1 in 64 black children, 1 in 103 Hispanic children and 1 in 53 Asian or Pacific Islander. Lionheart Charter Academy will not discriminate against any individual because of their race, ethnicity or socioeconomic background.

In Guilford County, there are 72,388 total public school students. Of these students, 1054 have been identified with Autism Spectrum Disorder. (add appendix) This is roughly 1.5% of the students in Guilford County. Nationally, 1% of children ages 3 to 17 have a diagnosis of Autism Spectrum Disorder. Guilford County is the perfect place for a school for children with ASD since there is a higher concentration of these children in North Carolina as compared to the national average.

Caring for a child with ASD places a heavy economic burden on families plus a large financial impact to the entire community. The estimated cost of caring for a child with ASD is \$17,000 more per year than a typically developing child (www.cdc.gov website). It is the fastest growing developmental disability at 1,148% growth rate and costs \$60 billion annually with 60% of those costs applied to adult services. (www.autismsociety.org) According to the Autism Society, only 56% of students with Autism finish high school. This impacts our local economy because public funds must be used to support those not appropriately prepared through their education. Lionheart Charter Academy (LCA) will target those individuals capable of achieving a high school diploma, but have difficulty learning in a traditional classroom environment. Lionheart Charter Academy is committed to provide the quality education needed to ensure that these individuals will become independent contributing members of society.

- 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 projected enrollment for Lionheart Charter Academy (LCA) is 75 students in grades 6-10 in the first year, and 105 students in grades 6-12 by year three. We project 100% of our student population will come from Guilford County Schools LEA. Guilford County Schools serves approximately 72,400 students, of which approximately 37,800 students are in grades 6-12. In year three, our projected enrollment of 105 students represents 0.3% of the LEA.

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

A primary way in which LCA will differ from the LEA is in the specialization of educational programming and teaching strategies specific to the research based needs of the target population-diploma seeking students with an Autism Spectrum Disorder (ASD). The physical and academic setting will differ from the LEA. Lionheart will be a smaller school environment, with 75 students in

year one, and 135 in year five, as compared to the LEA's secondary schools with enrollment as high as 700+ students. These environments are particularly difficult for students with ASD as these schools are difficult to navigate and there is often sensory overload in the crowded halls. Our classroom sizes will also provide more effective learning environments, given class sizes of 15 students for subject areas. This minimizes distractions and provides a sense of safety as they pass from grade to grade in Middle School to High School with peers that they are familiar with-increasing their ability to make "friendships" at school and relieve the anxiety of starting over each year with new teachers and often, entirely new classmates in each class. While this may seem insignificant to those who do not have an in-depth understanding of ASD, it can have a profound effect on ASD students as the anxieties of these large settings begin to shut them down socially and affect academic performance. The overload (sensory, social and other demands) in the larger school setting/larger classrooms of the LEA can also contribute to poor academic performance since students on the spectrum often exhibit difficulty keeping up with the pace of the instruction, avoid asking questions for clarification, avoid group work, and have difficulty advocating for themselves. While the teachers in the LEA are trained in differentiation (as will Lionheart teachers be), it is difficult for them to apply this in class sizes of 27-30 students, even in co-taught classes. At Middle School levels, teachers may use a team teaching approach; however, at the High School level, this is seldom seen in the LEA schools. An additional dilemma faced by the LEA is that teachers receive very little training specific to ASD (both in university education as well as in ongoing professional training). The result of this is that the teachers find themselves with ASD students in their classrooms, but are generally not equipped to understand and provide needed interventions for the academic/learning needs, as well as the other related issues (sensory, behavior, social, and executive functioning). Lionheart's proposal incorporates the requirement for teachers to be trained in methods and strategies specific to the needs of the target population. These include the ongoing daily use of Applied Behavior Analysis and Social Thinking (developed by Michelle Garcia Winner); methodologies for building upon their learning styles and strengths; a specific daily class period for Project-Based Learning (for application, generalization, problemsolving, and learning to work as part of a group); two daily check ins and an abbreviated class period at the end of the day to address executive functioning skills, as well as the specific strategies for academic success. These strategies will be presented in depth in appendix U of the proposal. It is important to recognize students/individuals on the spectrum as having "unique" learning needs. While it is common knowledge that students with ASD often learn best through visual representation, there tends to be a lack of understanding in how to effectively use visuals as well as the many other learning differences that may be seen as a result of "Theory of Mind" in ASD. This, as well as other terms specific to understanding education with this population, are defined in the Appendix U Glossary of Terms. It is imperative that parents have a choice for an education that will greatly increase post-high school success.

- 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 students.*
- 6. Encourage the use of different and innovative teaching methods.*

The choices available to parents of children with ASD are very limited. Parents are advised of their children's least restrictive environment and are placed at the school that is closest to their home. These schools vary greatly in administrator and teacher knowledge and experience in working with these students. While Guilford County appears to provide appropriate services for the ASD students that are highly impacted and those few that can access the general education curriculum without specialized ASD supports- there is a gap that exists for those students that are in the high functioning range. Children with ASD are considered high functioning if they have the potential to earn a high school degree and work competitively. Guilford County appears to have developed a policy to effectively dismantle programs specific to high functioning children with autism preferring now to group all exceptional children under one umbrella regardless of diagnosis. This cross-categorical approach is likely more efficient at the County level and seemingly equitable in terms of the delivery of services, but with the elimination of dedicated ASD programs, these high functioning children are falling through the cracks. These students have the potential to earn a diploma and become independent with researched based instruction and specialized supports. Furthermore, charter and private schools that parents have encountered in the area have been found to lack the necessary components for success. Additionally, many private schools will not enroll children with ASD in their school. Innovative teaching/learning approaches that address the needs of the "whole child" are imperative to the long-term success of ASD individuals. Research shows this population has specific needs requiring direct instruction for social skills/thinking, executive function skills as well as specialized interventions and supports for developing self-regulation of behavior.

A parent of a child without ASD has options such as magnet schools, charter schools and private schools. These schools are generally not equipped to teach ASD students and lack staff trained in the research based teaching/learning needs, both academic and non-academic, for this population of students. Due to these educational issues, specific to ASD students,

Lionheart Charter Academy -To develop diploma seeking students with Autism Spectrum Disorders into independent adults through research based education strategies designed to increase academic and social success.

many parents have opted to home school; however, these students miss out on the many social learning opportunities that they would encounter in a public/private school setting.

Lionheart's purpose is to provide an innovative school that will meet the academic and non-academic needs of this unique population, utilizing the most current research based teaching/learning approaches for teaching the "whole student". There are currently no educational options such as this, available for parents and students.

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.*

I Operations Goals

1. To form a Parent Teacher Organization (PTO) that will include the following committees:

a. Transportation - This committee will form a carpool group that will encourage people to

volunteer for carpool and schedule riding groups based on where people live.

They will also recruit volunteer drivers and follow procedures for obtaining

background checks and contracts. This committee will report to the Head of

School weekly regarding children in need of transportation. The committee will

report problems and progress during monthly board meetings.

b. School Lunch - This committee will develop the monthly school lunch menu and distribute it to

parents for review. They will also place the lunch orders and collect the

money. The committee chair will distribute the lunches as well. This committee

chair will report weekly to the Treasurer on the board.

c. After School - This committee will form after school clubs. Depending on interest, the clubs

may include: running, Lego, social or Tae Kwon Do. The Head of School will work

closely with this committee reporting weekly progress. The committee will

report problems and progress during monthly board meetings.

d. Fund Raising - This committee will develop and run fund raising campaigns to provide working

capital and supplemental operating funds. This

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committee will report monthly
to the board Treasurer.

2. To form good relationships with employers that will provide our students with stimulating work for our Occupational Course of Study (OCS) program. Lionheart will survey students and parents regarding the work and employers. A Lionheart representative will also make monthly site visits and report to the board.

II Academic goals

1. Students on grade level will show 60% proficiency or academic growth on end of grade testing in the first two years.

2. Those students not on grade level will show academic growth by one grade level per year for each tested area or as otherwise determined by the IEP team for their expected level of growth.

3. 95% graduation rate with success post high school determined by enrollment in higher education or obtaining and sustaining competitive employment within one year of graduation. This will be monitored with quarterly post high-school support group meetings where alumni can share their experiences.

III Finance goal

1. Maintain a budgetary surplus.

2. Acquire capital to provide an exemplary physical environment and educational framework.

IV Governance goal

1. Maintain a strong team of teachers. Teachers will be supported by and receive feedback from the Head of School and Assistant Head of School/Special Education Coordinator.

2. The board will form a close working relationship with administration, staff and families by keeping parents engaged and up to date on school operations and activities. Parents will fill out annual surveys with 90% of them having favorable responses.

3. The board will function in an efficient manner building committees and subcommittees to drive the school toward strategic plan success. This will be measured as set committee goals are reached.

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

The governing board will meet monthly and establish an efficient agenda. The board meetings are open to the public and all are welcome. The agenda of each meeting may be adjusted according to current issues that require discussion.

During board meetings, selected committee chairs will report current progress. The board will help the committee to determine follow-up action steps that the committees may need to take to continue to make forward progress toward goals and objectives. It will be the responsibility of the committee to provide any necessary documentation of progress to the board, however it will be the governing board's responsibility to ensure that the committee's are focusing their efforts in areas related to the attainment of the mission statement.

The governing board will collect and evaluate data regarding enrollment, wait lists, grade advancement, end of grade testing, student achievement and graduation rates. This data will be a good indicator of mission and vision success. If action is required in any of these areas to better meet the mission of the school, the board may propose changes or adjustments to committee focus and or marketing efforts.

The board will be able to obtain concrete evidence of the success of the mission based on parent and student surveys. Keeping open lines of communication between families, board and staff will be an integral part of receiving feedback about the proposed mission.

The board will make every effort to track students beyond graduation to determine if their educational environment has added to their level of post high school success. They will ask alumni to attend a forum in order to provide statements of success related to the mission. This may also become a potential piece of marketing in year four of Lionheart's inception as alumni success will be a powerful factor in the decision of families to enroll their children.

There are concrete national statistics that show that only 56% of students with Autism finish high school. Lionheart's graduation statistics as well as post graduation employment data collected will be an excellent indicator of mission success.

Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
now enrollment makes a bit more sense broad spectrum of challenges to serve	Amy Ruck Kagan	Mission Stat
Insufficient evidence provided to demonstrate full demand for proposed school. Sample survey statements does not constitute as evidence as commitments for 75 students.	Cande Honeycutt	Educational
Evidence presented supporting of need for the school model is less than compelling. Likely, financial viability of the school program is dubious. There is not a clear articulation of sufficient interest in the school, sufficient demand for the school model and prospective student data is not disaggregated by where students fall along the spectrum. while there is a description of outreach activities they are not designed to reach a broad enough audience. It is unclear whether outreach activities are sufficient to ensure equal opportunity to enroll.	Tracy Kelley	Educational
Of the 1054 students in Guilford County identified as Autistic, all should be contacted regarding if their educational needs are being met and if they would be interested in attending a new charter school focused on serving students with autism. Again, the Charter School team should gather a better understanding of if such a small school is financially viable while still being able to serve their projected numbers. The attached evidence of educational need is noble however only lists quotes from different community members. Additional information including the number of people polled and percentages of responses to questions relating to a charter school serving autistic children would be beneficial.	Greg Schermbeck	Educational
The evaluation criteria are met for the fifth legislative purpose however additional information should be gathered that satisfies additional purposes.	Greg Schermbeck	Purposes of
more detail could be provided less on outcomes, more focus on changing the expectations for students	Amy Ruck Kagan	Purposes of
Purpose does not address students on the lower-performing students on the autism. The school should be prepared to provide a full continuum of services for all enrolled students as the needs for children with ASD can vary widely.	Cande Honeycutt	Purposes of
Applicant addresses just 1 purpose, attempts to satisfy additional purposes should be explored to ensure a broader impact.	Tracy Kelley	Purposes of
Operations, governance and finance goals are not SMART. The governing board is not reasonable for gathering data--indicates a lack of understanding pertaining to role and responsibility of school leader, staff, and board. Student perf goals are not sufficient.	Tracy Kelley	Goals for th
goals need development not specific or measurable governing board should not be collecting data	Amy Ruck Kagan	Goals for th
The academic goals are noble, but I'm unclear on the testing logistics and requirements for autistic students. "Students on grade level will show 60% proficiency or academic growth on end of grade testing in the first two years." This goal is unclear on if 60% proficiency is the bar or just growth. If growth, how much? Also, 60% is generally a low metric and I'm not sure if the bar should be lowered for students with autism.	Greg Schermbeck	Goals for th
PTO committees are inappropriate. The board and administration should be responsible for those areas. How will academic goals be measured beyond EOG/EOC? What constitutes as one year of growth?	Cande Honeycutt	Goals for th

<p>Budget goals are generic.</p> <p>Governance goals are generic and lack quantative measurements. There is a heavy reliance on surveys.</p>		
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Reviewer	Score
Cheryl Turner	
Joe Maimone	
Amy Ruck Kagan	Fail
Becky Taylor	
Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Marie Massengill	
Sherry Reeves	
Tammi Sutton	
Greg Schermbeck	Fail
Tracy Kelley	Fail
Alan Hawkes	
Steven Walker	
Cande Honeycutt	Fail
Phyllis Gibbs	

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.

A Universal Design of Learning Model and Instructional Systems Design will provide the framework for instructional programming. Given the unique learning needs of ASD students-several methods will be incorporated throughout subject areas/learning experiences. Students learn best when they are actively engaged in the learning process. Meyers and Jones (1993) define active learning as learning environments that allow "students to talk and listen, read, write and reflect as they approach course content through problem-solving exercises, informal small groups, simulations, case studies, role playing, and other activities-all of which require students to apply what they are learning" (p.xi). Major instructional methods will be Direct Instruction (DI), Interactive Instruction, and Experiential Learning (EL). DI is the explicit teaching of a skill-set using lectures or demonstrations of the material. Students with ASD generally have less difficulty learning concrete information and struggle with abstract concepts. DI will allow students a way to learn information in a concrete fashion by providing: 1) introduction and review, 2) presentation of new information, 3) guided practice, and 4) independent practice. Interactive Instruction incorporates high levels of discussion and sharing among participants. Students can learn from their teachers and peers to develop social skills and abilities, to organize their thoughts, and to develop rational arguments. This method is particularly important to this population due to challenges in the areas of social and communication, as it requires cooperative learning and problem solving in pairs or in a group. These are skills that are difficult for ASD students and need to be developed and facilitated, as they are essential to higher level education and employment. Experiential Learning (EL) is process-based with the desirable outcome of making meaning from direct experience (i.e., "learning from experience"). Lionheart will incorporate an extensive amount and variety of opportunities throughout the instructional day for EL methods (field trips, experiments, simulations, role-playing, etc.) as well in the Project-based Learning class that each student will participate in daily. While students with ASD are often primarily visual learners, EL will enhance other learning styles such as kinesthetic and tactile. Methods such as Indirect Instruction, Instructional Skills, and Independent Study will be used based on individual needs for remediation or advanced learning. In alignment with 21st Century Teaching/Learning, technology will be incorporated throughout the instructional day as appropriate and meaningful. In assessing students, we will take a holistic approach. The Exceptional Children's Director will conduct a comprehensive review of all cumulative files. This will provide all service providers with information needed for guidance and instruction

for each student's individual needs. Further formal assessment needs will be determined upon admission. Informal and formal assessment for academics (as well as functional behavior analysis for learning and other needs to access the curriculum/school environment) will be ongoing. Goals based on "needs" will be set for those students without an IEP and monitored. Throughout the academic year, progress will be measured through a variety of means. Students will be graded for their work. Data will be kept for IEP goals for monitoring progress and revisions as needed, as well as goals for students without an IEP/504 plan. Because the target population is diploma seeking students, they will participate in the NC State testing program. Benchmark testing (2016) and End of Course and End of Grade tests (2016) will be administered and used for assessment purposes, remediation, and evidence of progress. These teaching methods and assessment strategies, as well as specific ASD strategies (Appendix B/B2), will ensure Lionheart students achieve our Mission.

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.

Lionheart Charter Academy (LCA) will serve students grades 6-10 in the first year of proposed inception; 15 students per grade. For the first year and continuing, there will be 6 teachers/3 teacher assistants (TA) for instruction and support. Each successive year, a teacher will be added and in years 2 and 4 a TA position will be added. All students will be taught the NC approved course of study for all grade levels/spans. Classroom sizes for core subjects, for all grade spans, will consist of 15 students (opposed to LEA class sizes of 30+ students). Academic instruction for core subjects will be classroom-based and content will be differentiated. ASD research-based instructional strategies will be used throughout all subject areas (see Appendices B and B2: LA Scope and Sequence). Since the target population is ASD, it is anticipated that most will have an Individual Education Program (IEP). Therefore, all teachers will be certified in special education, as well as highly qualified when required, for subject areas they teach. Differentiation of education will ensure that below grade level and those on grade level or academically gifted can all achieve/demonstrate academic growth measured by their IEP or end of grade state test standards. Non-academic subjects will be taught through classroom-based instruction for all grade spans with exception of World Languages (virtual learning monitored by teacher of record). A typical MS day will consist of 70 minutes instruction for Language Arts (LA); 45 minutes allotted to core content and 25 minutes to remediation or specialized group work for those who are performing to level and/or academically gifted. Likewise, there will be a 70 minute period for Math (MA); 45 minutes for core content and 25 minutes for remediation or specialized group work. It is important to note that for the ASD population, reading "comprehension", writing, and math "reasoning" are of particular challenge, requiring additional time in these subject areas. Students will attend a Science and Social Studies class (45 minutes each). Interdisciplinary learning units will be pertinent to learning. Lionheart students will additionally have a 45 minute Project-based Learning class daily to engage them in application of academic and non-academic skills (Executive Functioning and Social Thinking). All MS students will attend two

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30 minute elective courses: Physical Education/Health and the "Wheel", consisting of different courses each quarter to broaden experiences (i.e., arts, music appreciation, technology, foreign language, life skills, job skills/career preparation, independent living skills, etc.). A HS day will resemble a MS day with classroom-based instruction for HS courses required for the Future-Ready Core or Future-Ready Occupational degree, ensuring High School Graduation Requirements are met for the NC approved course of study. English courses and Mathematics courses will consist of 70 minute class periods; Science, Social Studies, Occupational Preparation and Project-based Learning courses 45 minutes; PE, required CTE, World Languages (WL) and Electives 30 minute periods. Students in the Future-Ready Occupational Course of Study will be provided 330 hours of school-based training and transportation/work sites for the required 240 hours of community-based training and 360 hours paid employment.

Non-academic learning is an essential part of Lionheart's mission and purpose. Each student will have a homeroom teacher. The day will begin with a 15 minute home room period to prepare for the day; a 30 minute lunch period in homeroom for "check in"; and a 25 minute period at the end of each day for guidance/instruction in Executive Function/Study Skills/Transition Goals. All students will have in-depth transition plans, exceeding the depth of those of the local LEA. Through this learning environment, we can prepare students for each grade level/span and for success in college, employment and independent living.

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.*

Following the NC Standards for curriculum and instruction allows teachers to prepare students with the necessary academic content that is required to show progress on the interim and end of year assessments as outlined by the NC Accountability Model. Although this is successful for the typical student population, more specific strategies that target ASD deficiencies must be put in place to close the gap between ASD students and their non-disabled peers. Without deploying additional strategies, that Lionheart Academy intends to use, it is difficult at best that the same measures of proficiency and accountability could be attained.

Adding researched-based methods, strategies and supports to the curriculum will enable students with ASD to access the curriculum, show student proficiency in each grade that is necessary to obtain their diploma, and to have the social/problem solving skills necessary for post high school success in employment and/or higher level learning. Universal Design of Learning will identify barriers to learning so supports (visual, audio, etc.) can be put into place for each student. Direct instruction will deliver academic instruction in a concrete fashion. Interactive learning and project base learning will be incorporated in the curriculum to teach

students problem solving skills, negotiation skills, communication skills, executive function skills, and social thinking (developed by Michelle Garcia Winner) which are all areas in which students with ASD struggle. Instructional strategies and supports provided in the classroom such as priming, whole-part-whole instruction, task analysis, etc. are strategies and supports that improve learning outcomes. Employing academic and non-academic research based ASD specific strategies with common core standards will ensure Lionheart students college/career readiness, improved social skills, and increase independence which encompasses the mission of Lionheart Charter Academy. The academic goals set out in this charter are targeted to improve students overall performance in middle school and high school and upon graduation from high school have students prepared for college or career.

- 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.*

The learning needs of students on the autism spectrum (ASD) are unique and instructional strategies need to be research-based for this population of learners. First, teachers must be able to implement an Individualized Education Plan (IEP) and 504 plan for specified modifications and accommodations, recognize when revisions need to be made, and collect meaningful data. This is essential to making informed decisions regarding differentiation and effectiveness of strategies being used in the classroom. Three other broad areas required are strategies for Applied Behavior Analysis (ABA), Executive Functions, and Social Thinking developed by Michelle Garcia Winner. Students with ASD have complex behavior challenges in the many areas previously described. It is essential that all teachers are proficient in ABA and master functional behavior analysis for intervention. Learning is a behavior and students with ASD have compounding factors that interfere. Executive function difficulties and Social Thinking challenges impact these student's ability to access the curriculum and achieve at the levels that they are capable of both in school and post-high school. In viewing the example curriculum synopsis and Scope and Sequence for all grade spans in the area of Language Arts, there are many specific research-based academic strategies. We chose Language Arts/English since reading comprehension affects all areas of learning/all subject areas. Understanding of written material affects Social Studies, the Sciences and Mathematics (word problems for application for mathematical operations). Students with ASD often have difficulty staying engaged and attending in traditional academic settings. To be engaged, they need connectivity in learning. Lionheart will teach at the MS level using interdisciplinary units at least twice per year where team teachers will be required to plan units for a novel appropriate to the grade level and applying content area from each of the core disciplines. Middle School (MS) Language Arts and High School (HS) English teachers will use a Four-Block Method. This method requires that the core subject allotted time (excluding the 25 minutes for remediation/group work) incorporates vocabulary, group reading, writing and self-selected (with teacher approval of content) reading. All teachers will be trained in the strategies for Language Arts (Scope and Sequence section; appendices B and B2), due to reading and comprehension requirements of other core subjects. Mathematics, both MS and HS, will require that teachers create lessons that provide for engagement through several methods and

master strategies for interactive learning through the use of manipulatives and presentation of material with visual representations. Mathematics teachers will need to master Schema-Based Instructional Design, as a foundation for math strategies, which a review of literature/research supports as extremely effective with this population. MA teachers will also be trained in strategies for reading comprehension, due to the difficulties that ASD students have with word problems (understanding what is being asked/what mathematical operation to apply). The final area that all teachers will be required to learn and master is planning and implementation strategies for Project Based Learning. All Lionheart teachers will need to participate in teaching Project Based Learning classes and contributing to innovative learning projects from their content area disciplines. Student's with ASD learn through doing and PBL can provide for the needs of this population for problem solving, cooperative group learning, and recognition of multi-intelligence strengths. Teacher training and mastery of both the broad and specialized strategies will ensure that Lionheart students access curriculum and the general school setting; most importantly they will be prepared for success post-high school, which is our ultimate purpose and mission.

- 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.*

The instructional plan provides for the NC approved curricular needs for each Middle School grade level and for High School grade level students; both the NC Future-Ready Core and the NC Future-Ready Occupational diploma tracks. Lionheart Academy recognizes that simply meeting the curriculum requirements for the target population (student's with ASD) is not enough. There can never be total assurance that these students will be prepared for the next grade level or grade span; however, we know that we can increase the chances of this dramatically through our specialized programming and strategies. To truly access the curriculum and educational environment, as well as be successful and independent post-high school, these students need a high level of education and intervention in what is generally considered as non-academic areas-areas that the LEA can no longer address through the curricular day due to class sizes and lack of specialized teacher training for this population. These are the areas that will make Lionheart different and effective with these students. Through continuous use of Applied Behavior Analysis (ABA) for learning behavior and ASD related behavior, as well as Social Thinking Concepts (developed by Michelle Garcia Winner) throughout all programming; trained/experienced Exceptional Children Educators; and the training and use of specialized strategies for learning in the content areas (as well as CTE and elective courses) our students will be prepared to the best of their abilities for continued growth and success. Additionally, we have integrated Executive Function skills (an area essential for students/individuals on the spectrum) and Project-based Learning classes/experiences. All of these areas are presented in the research for this population as needs for our target population as well as needs (lacking) of the adults that are entering society. The Lionheart educational plan has been deeply thought out, researched, and developed to ensure that Lionheart Charter Academy can meet it's mission and purpose in Guilford County.

- 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?

The proposed Lionheart Charter Academy educational plan provides for all academic coursework requirements for the NC Future-Ready Core and the NC Future-Ready Occupational diplomas, as well as required work hours at the school site and in a community work setting. Credit hours will be earned according to the same standards as the LEA (Guilford County Schools) for the NC Future-Ready Core and NC Future-Ready Occupational diploma courses of study. Credit hours will be earned accordingly. Grades will be based on a 10 point scale: 90-100 A; 80-90 B; etc. Lionheart will not use grading as a modification/accommodation. Student's will be graded according to what they earn on assignments, quizzes, tests and class participation with the Individual Education Program modifications and accommodations specified in their IEP/504 plan, when appropriate. Teachers will determine how overall grading will be weighted for tests, quizzes, homework, class assignments, and class participation, under the supervision of the Head of School and the Exceptional Children's Director. Parents and students will be notified of the grading for each class attended with a rationale provided for the teacher's grading system. Interim grade reports will be provided to parents and students at three week increments and an opportunity to request a parent-teacher conference (students will be able to attend these conferences). Report cards will be provided quarterly (as indicated in the academic school year calendar, which will coincide with the local LEA's calendar). Grades will accumulate with quarterly grades averaged for the semester grades and semester grades averaging for the overall end of school year grade. Notification will be provided on the final student grade transcript in regard to if the student will pass to the next grade level. Lionheart will participate in the NC State Testing Program. Students will be tested in accordance with NC DPI requirements and with IEP accommodations and modifications as described in each student's individual plan.

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 proposed Year 1 school calendar is based on a projection of what the 2016 school calendar for the LEA, Guilford County Schools (GCS) may resemble. It provides for the 185 instructional days; 1,025 hours. The calendar is anticipated to change based on the adoption of the LEA's traditional school year calendar for each proposed Lionheart school year. Many of our students will have siblings attending GCS and a consistent calendar will relieve parents of the burden of having students on two different school schedules. The academic calendar provides for a traditional educational school year in which students in Middle School and High School can complete educational requirements for each grade and be prepared for the next grade or grade span. Additionally, professional development will be scheduled according to the needs for teachers that are identified in this plan. This will ensure that teacher's are prepared and student's can attain our mission "to develop diploma seeking students with an Autism Spectrum Disorder into independent adults through research based education strategies designed to increase academic and social success".

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.

Student's performance and progress will be measured in several ways. Like the LEA, student performance will be measured through progress on interim/benchmark subject area testing and quarterly/semester grades. Given that our target population consists of students with ASD, and the poor outcomes for individuals on the spectrum post-high school, we will adopt an approach that all of our students are or have the potential to be "at risk". For this reason, other methods and systems will be put into place for prevention and intervention. All teachers will be required to keep data for academic and non-academic goals (note: those students without IEP's will also have measurable academic and non-academic goals based on ongoing behavior analysis for learning needs/behaviors). During weekly teacher team meetings, facilitated by the Exceptional Children's (EC) Director, each student's performance will be briefly discussed by the team to determine prevention/intervention needs. The grade level team will determine if interventions in place need to be used more consistently, or if a separate/formal meeting needs to be held to determine revisions in goals and interventions. Due to the small class/grade number of students, teacher team approach, and school-wide practice of Applied Behavior Analysis (ABA) monitoring of students will be intensive and preventive so that interventions can be put into place quickly. To ensure that each student's educational goals are being addressed, and as part of the teacher evaluation/growth and development process, the EC Director or Head of School will formally observe each classroom twice per month and classroom walk throughs will occur on a regular basis (weekly at a minimum). This will serve to ensure that the broad educational strategies of ABA and Social Thinking (developed by Michelle Garcia Winner) are being used, IEP's and educational/behavior plans are being followed, and ASD strategies specific to subject areas are being implemented. The EC Director or Head of School will additionally observe students who appear to be struggling in order to provide further feedback and suggestion to the teacher team. Two periods of time are built into the core subject areas of Language Arts/English and Mathematics for remediation. These times will be used to target areas of concern for prevention and intervention. If it is determined by grade level team and EC Director that classroom remediation and interventions are insufficient for a particular student, afterschool tutoring will be available to address specific needs.

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.*

Lionheart Charter Academy will serve all ELL students identified during the enrollment process. In accordance with The North Carolina State Board of Education policy GCS-K-000 (16 NCAC 6D.0106), by providing all new students with a Home Language Survey (HSL) during their initial enrollment process, Limited English Proficient (LEP) students will be id'd. Students who transfer to Lionheart during the school year will be assessed using the annual ACCESS test of English language proficiency.

Lionheart will utilize the organizational flow chart for identifying LEP

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students available at:
<http://eldnces.ncdpi.wikispaces.net/NC+Charter+Schools>. The majority of the students who enroll at Lionheart will already have an IEP. For these students the procedures for students who have an existing IEP will be followed.

Regardless of whether Lionheart has identified LEP students it will designate a staff member to work with LEP data through the authoritative source. If Lionheart identifies LEP students, the designee will join the LEP coordinator listserve, provide contact information for the LEP Coordinator and attend an LEP informational webinar. It will be the responsibility of the LEP coordinator to complete the October 1 and February 1 headcount, follow appropriate test training, validate the tiers for ACCESS testing and attend the beginning of year LEP Coordinators meeting hosted by NCDPI.

Lionheart Charter Academy will utilize the 2012 Amplification of The English Language Development Standards. The NC ELD Essential Standards or WIDA continuum process for listening and reading as well as speaking and writing will be the base for LEP instruction. The continuum consists of the following components:

- Entering
- Emerging
- Developing
- Expanding
- Bridging

Within this continuum the students will work their way through the Discourse, Sentences, and Word Phrase components as outlined below:

Linguistic Complexity
Language Forms
Conventions Vocabulary Usage

This process will begin with smaller concepts and continuously build to larger ones. Due to the unique nature of Lionhearts target population the ELL strategies often required for ELL students to be successful are the same strategies that are successful with students with autism. Visual examples and cues are the norm in a classroom for students with autism as well as ELL. Another commonality is the need to directly teach and build vocabulary using visuals from a basic level up. These teaching strategies for two different populations actually lend themselves to each other well.

Lionheart Charter Academy recognizes that their LEP population will struggle with the co-morbidity that comes with having an overlapping diagnosis impeding the language development process and is committed to helping these students to not only become proficient English speakers, but also develop the students ability to read social cues by providing equitable access to the curriculum. The latter is likely affecting the students in their native languages as well.

North Carolina is a member of the WIDA Consortium. Once students have been identified using the appropriate placement tests HSL or WIDA ACCESS, individual ELL plans will be developed based on the results. Additionally,

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the school will annually assess the English proficiency of ELL students through the use of the ACCESS for ELLs test, provided by the WIDA Consortium. This assessment will be used to modify curriculum or exit students with proficiency from the program.

While these methods will provide solid data. Students will continuously be monitored on an informal basis to determine if they are advancing in progress. Progress considerations for Lionheart Academy students will be:

- acquisition of new language, vocabulary and writing skills
- applications of new language, vocabulary and writing skills
- understanding of new language and vocabulary in applied social contexts in both directed groups as well as informal settings with peers.

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.*

Lionheart Charter Academy acknowledges that "Academically or Intellectually Gifted students require differentiated educational services beyond those ordinarily provided by the regular educational program." Article 9B 115C-150.5 All students at LCA, as previously discussed, will have access to differentiated instruction to meet their individual needs. While most students at LCA will have an IEP or 504 plans for provision of a Free and Appropriate Public Education (FAPE), we recognize that some students may also be identified as Academically/Intellectually Gifted (AIG). These students will receive AIG services in accordance with NC AIG Program Standards, Article 9B (N. C. Gen. Stat. 115C - 150.5 150.8).

We will ensure that student identification procedures for AIG are clear, equitable, and comprehensive, leading towards appropriate educational services through careful monitoring by the EC Director. Lionheart will ensure that identification, screening, parental involvement, and procedural safeguard requirements are adhered to in accordance with the North Carolina AIG Program Standards (2009) as well as ensuring consistency in the implementation of the screening, referral and identification process for those not previously identified AIG.

Screening procedures will provide equal opportunity for all students using the following:

- Multiple criteria for decision-making including informal classroom assessment and formal assessment such as benchmark/interim assessments and end of course and end of grade assessments
- Assessments that go beyond a narrowed conception of giftedness
- Reliable instruments/strategies for assessing giftedness,
- Appropriate instruments to be used with underserved populations, and
- Data which provide relevant information for instructional decision-making.

Data obtained through the process of screening for AIG will be maintained in the student file. If identified, this information will become part of the student's cumulative file in an AIG Differentiation Program folder and will

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be used to determine appropriate differentiation of services. Screening procedures and processes as well as a list of the specific assessments used to determine aptitude and achievement will be included in the folder.

Students who qualify and have been identified for AIG will each have a Differentiated Educational Plan written to include:

- the present levels of educational performance
- goals, including measurable short-term instructional objectives
- the specific services to be provided to the student, and
- criteria for evaluation procedures and schedules for determining whether the objectives are being achieved.

Gifted Curriculum objectives will focus on developing cognitive, learning, research and reference, and metacognitive skills appropriate to performance levels, while also taking into account IEPs as appropriate. Differentiation for AIG needs will be incorporated into one or more of the following content areas: mathematics, science, language arts, social studies, and/or foreign language based on each student's identified needs.

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)*

The target population for Lionheart Academy Charter School will be students who have been identified with an Autism Spectrum Disorder and are diploma seeking; therefore parents will be required to present copies of school records and other diagnostic/evaluation information. The Exceptional Children's (EC) Director will meet with each parent seeking enrollment in regard to appropriateness, adhering to our mission, and determining EC services needed.

Requesting Records: A request for records will be sent to the previous school upon admission. If not received in a timely manner, information

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provided by the parent will be honored until the student's records are received. Follow-up requests will occur through fax, phone calls, and request to access EC records through the Comprehensive Exceptional Children Accountability System (CECAS) online data management system. A comprehensive review of records will be conducted to determine if further assessment may be needed, as well as to disseminate essential information to the Head of School, student's teachers, and other support staff on a "need to know" basis. Pertinent information will include, but will not necessarily be limited to:

- medical diagnoses/medications currently being taken/immunizations and health records
- unusual family circumstances (homelessness, guardianship, persons prohibited contact with the student)
- the IEP or 504 plan with specifics for accommodations and modifications
- sensory, behavior and other non-academic areas needs not clearly specified in the IEP or 504 plan
- student discipline records and behavior intervention plans
- student history of grades and,
- screening for ELL and AIG needs.

Based on our target population, it is anticipated that students will have an IEP or 504 plan; it would be highly unusual that they would not. If, however, a student who enrolls does not have an IEP or 504 plan, the EC Director will oversee monitoring of these students through team meetings and classroom observations/assessments. If the student is found to be struggling in academic or non-academic areas a functional behavior analysis and review of student performance in both academic and non-academic areas will be completed; interventions will be put into place to target identified needs and data kept to be monitored by the EC Director. If it is then determined that the student is in need of further psychoeducational evaluation, by an IEP team, a request for formal testing will be made to the student's LEA home school.

IEP's and 504 plans will be monitored for effectiveness throughout the year, and meetings held for revision as needed.

Confidentiality (on site) Records will be kept confidential in accordance with the Family Educational Privacy Act (FERPA) and IDEA. Records will be stored in a locked, fire proof file cabinet and in a room that is to be kept locked when not in use. Records may only be viewed by authorized personnel and an access record with the date, name of person, and purpose will be maintained. Parents/legal guardians may view files, upon request, with school personnel present. Confidentiality of electronic records will be ensured through the secure systems (CECAS/other state/local records sites) and pass-word protected to ensure use by only those authorized.

Record Compliance (on site): The EC Director will be responsible for record compliance for IEPs consistent with the IDEA; an annual review of the IEP and three year re-evaluation determination, with an IEP team. 504 plans will also be reviewed yearly. Records will be retained and stored consistent with federal and state statutes.

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.*

By enrolling a student in Lionheart Academy, parents are placing their child by choice into a school setting designed specifically for students with an Autism Spectrum Disorder. Therefore, they are recognizing that their child/teen will not be taught in an inclusive classroom with non-disabled peers and IEP's will be revised accordingly to reflect that the student is being taught in a separate setting environment. As previously discussed, class sizes will generally consist of one teacher and 15 students per class, which is similar in size to the resource classes at the secondary level of the LEA. High levels of differentiation will be used in teaching student's as deemed appropriate and necessary for their academic present levels of functioning. Additional staff support will be available through the use of three teacher assistants, trained in the area of ASD, for those students deemed in need of additional behavior support to access the classroom environment. Given the high levels of staff development and use of Applied Behavior Analysis, Social Thinking concepts based on the work of Michelle Garcia Winner, as well as other ASD specific strategies previously discussed, we feel confident that most all students will be able to access the classroom setting/school environment for their Free and Appropriate Public Education and that additional intervention through the use of teacher assistants for behavior support will be minimal and short-term (as behavior intervention plans will be continually monitored and interventions and supports put into place in a timely manner for preventative purposes). As discussed in the previous section, identification and records, IEPs and 504 plans will be monitored throughout the academic year by the special education teachers and the EC Director. Compliance will be maintained through dissemination of IEP/504 plan information to the teachers, annual reviews of the IEP and 3 year re-evaluation determination meetings. Following any revisions to an IEP/504 plan (determined by the IEP committee), annual meetings, or reevaluation determination meetings, teachers who teach the student, the parent(s) and students age 14 or above will be provided a copy of the finalized documents resulting from the meeting and the minutes of the meeting within two school days of the IEP team meeting. Related services will be provided in accordance with the IEP and related services providers will be members of the IEP team for students that they serve. Credentialed related services providers will be contracted to provide services needed by Lionheart students at the levels specified in the IEP.

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. For our Future Ready Core diploma seeking population, our students are expected to perform in a manner so as to show that each student demonstrates consistent and measurable improvement equivalent to one grade level advancement per year in each subject area. We recognize that students may demonstrate varying degrees of proficiency depending on the subject area and our school will modify each individual students course of study as needed. For our Future Ready Occupational diploma seeking population, our students will be expected to meet all course requirements, career portfolio, IEP goals and objectives, and 900 training hours.

2. Although no additional formal evaluation tools or assessments will be administered to collect data outside of the state mandated assessments, informal classroom assessment (CBM and behavior) data will be collected for each student. This data will be used in conjunction with state assessment data to drive instruction and show progress on students IEP goals. Student achievement data provides a way to assess what students are learning and to identify students that are making progress toward goals. Data will also be used to identify instructional strategies that are creating the best results and see where additional strategies might be needed to improve student learning.

3) To be promoted in grades 6-8, students must pass a minimum of five subjects, may not fail more than one core subject(language arts, mathematics, science, social studies),and score a level III or IV on the End-of-Grade Tests in reading and mathematics. Students in grades 6-8 that do not show proficiency on end of year state assessments will receive focused intervention and then retest. If the student does not score a level III or IV on the retest the student can go through the appeals process. The appeals process will be in place for students who score below the level of proficiency on state assessments. It provides an alternative method for assessing proficiency of state standards. If a student has not met Promotion Standards, an appeal to promote the student can be made if evidence that the student is performing grade level work in the areas of reading and mathematics is shown in a portfolio of student work. The final decision to retain or promote will be made by the head of school.

To be promoted in grades 9-12 students must meet the following minimum culmination of units:

* Grade 9 to 10 - A minimum of 5 units cumulative course credit must be earned

* Grade 10 to 11 - A minimum of 10 units cumulative course credit must be earned

* Grade 11 to 12 - A minimum of 16 units cumulative course credit must be earned

* Graduation - A minimum of 22/26 units cumulative course credit and successful completion of any other state standards must be earned

High School (HS) End-of-Course (EOC) tests will be calculated as 25% of the students final grade for that course. A student who scores below a Level III on any EOC exam will be provided an opportunity to retest. The higher of the two grades on the EOC will be used to calculate the student's final course average. HS students who do not receive a passing grade in a course may have the opportunity to recover the credit through face-to-face instruction or online through NC Virtual Public Schools.

To ensure that parents are well informed, a progress report will be sent to the parents of each student at the end of each grading period. Teachers will meet quarterly with parents of students who are experiencing learning difficulties. If a student is in jeopardy of not being promoted to the next grade, parents will be informed by the end of the third quarter.

4) Students who successfully satisfy the graduation requirements by completing the required number of course credit and completes a post-secondary transition plan will be allowed to graduate. An exit exam will not be required for graduation since we will not be participating in race to the top.

Upon graduation, students from Lionheart Academy will have the general knowledge and ability to live independently and be successful whether they are attending post-secondary education or employed. All Lionheart students are "at risk" since our target population is students with autism. Therefore any "at risk" support or strategies have been put into place for all students.

Student Conduct:

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

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

Be sure to include:

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

1. Lionheart Charter Academy teachers and staff will pull from a variety of behavioral intervention plans such as Applied Behavior Analysis (ABA), Positive Behavioral Interventions and Supports (PBIS), and Social Thinking (Michelle Garcia Winner). The teachers and staff will perform functional behavior analysis for intervention when needed. A behavior intervention plan will be added to the IEP. If a behavior intervention plan already exists, it will be revised. Quarterly meetings will be held to review the behavior intervention plan unless otherwise indicated.

2. Offenses resulting in suspension or expulsion(taken from Asheboro City Schools Parent/Guardian Handbook, 2014):

- a. Weapons - possessing, handling, using or transmitting, whether concealed or open, any weapon, or instrument that looks like a weapon or could be used as a weapon. Weapons include the following: loaded or unloaded firearm, explosives such as dynamite, bombs, grenades and mines, knife - including a pocket knife, slingshot, leaded cane, blackjack, metal knuckles, BB gun, air rifle or pistol, stun gun, icepick, razor or blade, fireworks and any sharp pointed or edged instrument.
- b. Bomb Threats - students are prohibited from making, aiding and/or

abetting in making a bomb threat or perpetrating a bomb hoax against school property by making a false report that a destructive device is located on the property.

c. Terrorist Threats - students are prohibited from making, aiding, conspiring and/or abetting in making a terrorist threat or perpetrating a terrorist hoax against the school by making a false report that something designed to cause harmful or life-threatening injury to another person is located on school property.

d. Clear Threats to Safety of Students and Staff - behavior constituting a clear threat to the safety of others includes but is not limited to:

1. theft or attempted theft by a student from another person by using a weapon;
2. intentional burning of any structure or personal property;
3. an attack or threatened attack by a student against another person wherein the student uses a weapon;
4. an attack by a student on any employee, adult volunteer or another student which is intended to cause or reasonably cause serious injury;
5. an attack by a student upon another person whereby the victim suffers severe or aggravated bodily injury;
6. any intentional, highly reckless or negligent act that results in the death of another person;
7. confining, restraining, or removing another person from one place to another, without victim's consent for the purpose of committing a felony;
8. theft from another person by force;
9. unwanted intentional touching or attempt to touch, by one person of the sex organ of another;
10. possession, manufacture, sale or delivery of a controlled substance;
11. any behavior resulting in a felony conviction; and
12. any other behavior that demonstrates a clear threat to others.

3. Our school is particularly cognizant of the fact that students with disabilities, particularly children with an autism diagnosis, sometimes exhibit behaviors that within the LEA would be considered suspension or expulsion offenses. Our school will use discretion rather than strict guidelines in determining appropriate discipline. If a student exhibits behaviors that are a danger to the student or others, then the school will take appropriate actions to protect the students and staff.

4. Students and parents will be afforded an opportunity to be heard by the Head of School prior to a suspension or expulsion. Parents may appeal any suspension over three days or expulsion to the Board of Directors discipline committee for a full hearing and decision. Our school will follow all elements of IDEA laws and related statutes for Due Process and Manifestation Determination.

Section III: Education Plan Concerns and Additional Questions		
using DI, interactive instruction and EI- expensive, challenging, need specific mapping and a lot of thought still unclear how all programming will benefit target population	Amy Ruck Kagan	Instructiona
The education plan includes Direct Instruction and Expeditionary Learning, two opposite approaches to teaching and learning. How will these methods of instruction work cohesively to serve students with ASD? What benchmarks tests will be used to guide insruction?	Cande Honeycutt	Instructiona
Additional information should be provided regarding assessment strategies. Benchmarks and state exams are not sufficient. Documented evidence regarding the proposed approach or examples where this is successful is not included.	Greg Schermbeck	Instructiona
still concerned how it all works together	Amy Ruck Kagan	Curriculum a
The academic calendar is attached and well-done. The learning framework and sample course of study are attached and provides ample information and detail. Graduation requirements are attached as B2 however it does not list any electives or full range of programs.	Greg Schermbeck	Curriculum a
Fifteen to one ratio is not appropriate for all students with ASD. What about students who may require a 1:1 or other more intensive services? Budget does not align with plan in that there is no budget for increased services and no budget for any technology that would be used within the classroom or for the world languages component. Not enough funds allocated for the services that may be appropriate for a variety of needs. Six teachers would not be adequate when consideraion of required licensure for EC services in middle and high school. Concern that the school would be providing Future Core and Occupational track with only six teachers. Both tracks require specific certification especially when addressing EC licensure. The school does not have a budget for techology and would not have sufficient means to provide for virtual education as a supplement to the standard curriculum.	Cande Honeycutt	Curriculum a
The strategy of identifying gifted students is clear however a plan for how instructing will differ is not included. Additional detail should be provided regarding how the day to day instruction will be altered for gifted students.	Greg Schermbeck	Special Prog
"During weekly teacher team meetings, facilitated by the Exceptional Children's (EC) Director, each student's performance will be briefly discussed by the team to determine prevention/intervention needs" It would not be appropriate for the EC Director to be routinely facilitating discussions of regular ed. students. " the broad educational strategies of ABA and Social Thinking (developed by Michelle Garcia Winner) are being used," The practices of MG Winner are referenced often in the charter. What is the plan if this does not work w/a student or more than one student?	Marie Massengill	Special Prog
examples of interventions? how will gifted students' programs be differentiated? ELL- broad strokes, no detail	Amy Ruck Kagan	Special Prog
No funding for qualified staff to provide ELL and AIG programming. How will the school ensure that ELL students are served by a qualified teacher? How will AIG students received instruction in accordance with this plan if the school has no staff budgeted?	Cande Honeycutt	Special Prog
Chartering a school of EC identified students is problematic. It essentially becomes a public separate school, therefore, eliminating the ability to provide a full continuum of alternative settings, which is required by IDEA. Even with the 504 student enrolled is will be virtually impossible for this school to offer all levels on the curriculum.	Marie Massengill	Exceptional

<p>"The Exceptional Children's (EC) Director will meet with each parent seeking enrollment in regard to appropriateness, adhering to our mission, and determining EC services needed." What is meant by "appropriateness" and one person cannot "determine EC service needed" this is determined by an IEP team. If the student comes with an IEP, comparable services are required to be provided.</p> <p>"based on our target population, it is anticipated that students will have an IEP or 504 plan; it would be highly unusual that they would not. If, however, a student who enrolls does not have an IEP or 504 plan, the EC Director will oversee monitoring of these students" - this statement if problematic. It is not appropriate to have the EC Director monitor students who have not been identified as eligible for special education. This looks like predetermination that the student is in need of these services and will be referred.</p> <p>"If it is then determined that the student is in need of further psychoeducational evaluation, by an IEP team, a request for formal testing will be made to the student's LEA home school." Once the student is enrolled in Lionheart, then Lionheart is the student's home school. The previous school district is no longer responsible for any needed evaluations, screening, etc. That responsibility is now Lionheart's.</p>		
<p>who beyond EC is doing this work?</p>	<p>Amy Ruck Kagan</p>	<p>Exceptional</p>
<p>School cannot pre-screen candidates by requiring records or diagnosis of any kind. This section does not align with the admissions section later in the application.</p>	<p>Cande Honeycutt</p>	<p>Exceptional</p>
<p>How will the school follow Child Find procedures? The school cannot assume all children will come with a 504 or IEP.</p>		
<p>"By enrolling a student in Lionheart Academy, parents are placing their child by choice into a school setting designed specifically for students with an Autism Spectrum Disorder. Therefore, they are recognizing that their child/teen will not be taught in an inclusive classroom with non-disabled peers and IEP's will be revised accordingly to reflect that the student is being taught in a separate setting environment." Changing a student's IEP to "fit" what is offered at the school is referred to as changing it for "administrative convenience" and is noncompliant. As a reminder, this concept will not afford the offering of a full continuum which is required by IDEA. The IEPs will all be for public separate, which is actually more restrictive than separate. Students served in separate settings have the opportunity to have educational experiences with non-disabled peers, such as lunch, art, music, PE, and selected academics. This is essentially impossible in a school that whose student population made up of EC identified students. There would not be enough 504 students to make the difference. This also brings up the question of who will serve as the "regular education teacher" of the child on the IEP team.</p> <p>"we feel confident that most all students will be able to access the classroom setting/school environment for their Free and Appropriate Public Education" - keeping in mind that the classroom setting will be an EC classroom. No opportunity for accessing a regular education classroom for academics.</p> <p>There was an indication that more space was needed to complete this portion of the charter application but I did not find any more info.</p>	<p>Marie Massengill</p>	<p>Exceptional</p>
<p>no range of services prodded</p>	<p>Amy Ruck Kagan</p>	<p>Exceptional</p>
<p>There are no support mechanisms described to ensure students receive a FAPE.</p>	<p>Greg Schermbeck</p>	<p>Exceptional</p>
<p>How does this educational plan assure that children are receiving FAPE?</p>	<p>Cande Honeycutt</p>	<p>Exceptional</p>
<p>How does this plan ensure that children of all needs on the ASD spectrum are being adequately served?</p>		
<p>Performance goals do not include specific goals for grade levels or specific content exams. Clear goals and metrics should be set in order for teachers and students to have clear sense of what they are working towards.</p>	<p>Greg Schermbeck</p>	<p>Student Perf</p>
<p>how are they measuring growth and improvement? no other assessments? state end of year tests?</p>	<p>Amy Ruck Kagan</p>	<p>Student Perf</p>
<p>How will this school provide both Future Ready and Occupational track with the budget provided? Occupational track is a completely separate education program with</p>	<p>Cande Honeycutt</p>	<p>Student Perf</p>

Lionheart Charter Academy -To receive diploma seeking students with Autism Spectrum Disorders into independent adults through research based education strategies designed to increase academic and social success.

stringent requirements. Not enough teachers/staff to implement both programs with fidelity.		
Handbook does not contain a thorough discipline plan that outlines expectations for student conduct. Insufficient information to determine the processes and policies for this school.	Cande Honeycutt	Student Cond
how will they track, know it's working or know they need to adjust? although there is a need for discretion with this population, broad and open	Amy Ruck Kagan	Student Cond
" If a behavior intervention plan already exists, it will be revised." I would add the term "as needed" or "as warranted" to this statement. I think this section, given the fact that Lionheart Academy is being chartered for EC students, is inadequate. It does not even have the statement that all Federal and State laws regarding the discipline of students with disabilities will be followed. I think there needs to be some more thought and work need to be put into the very high priority section, exp. considering the category of students that are being targeted. With the information provided I think there will be high issues that will arise. This is not preparing them.	Marie Massengill	Student Cond
Applicant has provided some information about student discipline but does not address how expulsion or suspension will be handled in a way that is aligned with stated mission and with sufficient detail and specificity. It is unclear whether or not the student discipline policies as presented are in compliance with applicable laws. Student handbook was blank. Overall, the applicant did not provide sufficient details in order to determine the extent to which there is a shared vision for promoting, enhancing and sustaining a positive school climate. There was no articulation of policies promoting the development and sustainability of social, emotional, ethical, intellectual skills knowledge, dispositions, or a comprehensive system to address barriers to learning and teaching and student engagement.	Tracy Kelley	Student Cond
Student conduct and discipline is mentioned yet a thorough plan or framework is not provided. The application should state specific consequences for specific student actions that are clearly understood by both students and teachers. Further, a complete student conduct system should be put in place that encourages and rewards positive students behavior and choices. A draft handbook is provided however it is lacking great detail.	Greg Schermbeck	Student Cond

Reviewer	Score
Cheryl Turner	
Joe Maimone	
Amy Ruck Kagan	Fail
Becky Taylor	
Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Marie Massengill	
Sherry Reeves	
Tammi Sutton	
Greg Schermbeck	Fail
Tracy Kelley	Pass
Alan Hawkes	
Steven Walker	
Cande Honeycutt	Fail
Phyllis Gibbs	

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: Lionheart Charter Academy

Mailing Address: 1734 Battleground Ave

City/State/Zip: Greensboro NC 27408

Street Address: 1201 Merritt Dr., Greensboro NC

Phone: 336-908-1074

Fax: 336-790-9764

Name of registered agent and address: Chris Justice
1734 Battleground Ave
Greensboro, NC 27408

FEDERAL TAX ID: 47-1769903

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)
 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?

Lionheart Charter Academy -To develop diploma seeking students with Autism Spectrum Disorders into independent adults through research based education strategies designed to increase academic and social success.

Julie Taylor	Director	GUILFORD	Engineer		
Lorie Dietz	Director	GUILFORD	Autism Teacher		
Melanie Hanson	Director	GUILFORD	Autism Teacher		
Chris Justice	Treasurer	GUILFORD	Lawyer		
Aimee Picon	Secretary	GUILFORD	School Administrator		
Heather Pardue	President	GUILFORD	Audiologist		
Joe Hopkins	Director	GUILFORD	Small business owner		

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.*

Lionheart Charter Academy consists of a diversely experienced board. The primary function of the board of directors is to govern the school and oversee the Head of School.

The Head of School will oversee the general day to day operations of Lionheart Charter Academy. These duties include but are not limited to overseeing the teachers, teaching assistants, and administrative office staff including the Assistant Head of School/Special Education Coordinator. The Head of School will also oversee and partner with the Parent Teacher Organization (PTO) once it is established, as well as, any professionals who may be contracted to work at Lionheart Charter Academy such as Speech Therapists, Occupational Therapists, Physical Therapists, or Behavior Analysts. All board members, the Head of School, and all instructional staff as well as the PTO will establish an open line of communication with the parents and families of Lionheart Charter Academy. A depiction of this structure can be found in Appendix F.

The board's primary functions are to govern the school and oversee the Head of School. The board will oversee, participate in the development of, and approve a strategic plan for the school, forecasting action steps to accomplish goals according to said plan which will be developed as part of a 5 year growth plan. Additionally, the Board of Directors will be responsible for: the fiscal health of Lionheart Charter Academy, the adoption of policies, procedures and plans put before the board, the overall educational growth of the students of Lionheart Charter Academy and the non-evaluative role of employer to all staff. The Lionheart Charter Academy Board will serve as ambassadors for the school while out in the community and will play an active role in marketing toward Lionheart's target population of students and families.

The board has recruited a Head of School who is serving as an active board member until the time comes to assume the role of Head of School. The board

desired to recruit a person who has been an active educator of students with autism for many years, and who has in depth knowledge and training in the field as well as experience in supervision of others and understanding a school or business budget.

Outside of her core educator role, this person has established a non-profit organization to serve the autism student population of Guilford County by developing an after school care program, a Friday night social group for middle school and high school students, weekend outings and summer camps all designed to immerse students with autism in the social world in an authentic environment free from contrived scenarios so that the students can generalize the skills they learn during group classes. She holds an EDD in Counseling Psychology and has extensive experience in the implementation of ABA style therapies and Social Thinking.

The board intends to supervise the Head of School by helping to guide the Head of School to make sound fiscal and mission based decisions, while giving her the freedom to run the day to day operations of the school without excessive or unnecessary governance over those responsibilities.

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

The Board of Trustees is currently made up of seven (7) members. It will consist of no less than seven (7) members and will not exceed fifteen (15) members. The board will consistently seek to recruit board members with varying and diverse skill sets to maintain its integrity and sound structure. The initial board members are grouped into three terms with two members terms expiring the first year, two members terms expiring the second year, and three members terms expiring the third year. Subsequent terms will be three years for every board member.

The board shares the responsibility to govern the school in a fiscally responsible manner. Therefore, checks and balances will be put in place with regard to how money is handled. Some examples of checks and balances include: recording minutes during board meetings which will be available to the public, having parents as board members, and more than one signature will be necessary for checks written over a threshold amount. Additionally, we will comply with annual reporting requirements established by the state board of education.

Other initial primary governing duties of the board will be to establish the policies by which the school is governed. These policies will include the actions of school personnel and board members in the event of accidents, natural disasters, lockdowns and on campus violence. The board will contact the Lionheart Charter Academy's local school resource officer to tour the facility and determine the best course of action in the event of a crisis. The resource officer will be invited to the school to train the staff once it is in place.

The board will also develop policies and procedures for how to handle human resources issues such as staff grievances and employee conflicts.

Lionheart Charter Academy - To develop diploma seeking students with Autism Spectrum Disorders into independent adults through research based education strategies designed to increase academic and social success.

The board consists of an attorney with an undergraduate degree in accounting, two (2) special education educators who specialize in Autism Spectrum Disorders, one of which holds a Doctorate in Counseling Psychology and a private school administrator who holds Wilson Trainer Certification and specializes in intensive reading instruction intervention for students with learning disabilities related to reading. Four (4) of the board members are small business owners familiar with the budgeting needs of a school based business as well as employment management. Three of those businesses provide special education related services for Guilford County Students outside of school hours. Five (5) of the board members are parents of students with autism who are heavily driven by their shared vision of the need for a learning environment tailored to service the whole child toward life success. One of the board members is an engineer.

By maintaining a mission focused board, free from personal agenda, and driven by the implementation of a strategic plan, Lionheart Charter Academy will ensure effective representation of the key stakeholders, the parents of the children served by the school.

With the current board in place and its members' particular skill sets in both education and business, Lionheart Charter Academy's board is well prepared for the work involved in starting a school that the members feel so passionately about. The board has already taken necessary steps toward developing and securing a sound relationship with the building partner in order to ensure a smooth transition into their existing building.

The board will set forth an evaluative criteria for the Head of School based on the goals identified for or by the Head of School as pertinent to the annual function of the school as well as individual goals and smaller objectives designed to work toward and align with the strategic goals 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?

The founding board members are a group of parents and educators concerned about the future of students on the autism spectrum. Board members recognize that changes in the setting that their children are currently in, or transitions into new environments such as the transition to middle school from elementary will not meet the expectations of the parents. The stakeholders of Lionheart Charter Academy wish for their graduates to be able to successfully function independently after high school. National statistics show that the typical school environment does not currently produce adults on the autism spectrum prepared for independent living. The current board members feel confident that there is a specific need for this type of charter school and have come together to produce and provide that type of environment. This particular group of parents have a specific skill set that lends itself to a functioning and effective board. Special education professionals with a clear vision in alignment with parent's wishes and the ability and experience to provide an environment that utilizes research based programs became interested in helping to develop a school that leads students down a path towards employment and independence.

The initial board members are grouped into three terms with two members

terms expiring the first year, two members terms expiring the second year, and three members terms expiring the third year. Subsequent terms will be three years for every board member. When a position becomes vacant, the board will determine if that position needs to be filled. If so, we will seek someone with the qualifications that we need, but will open it up to our parent population first in order to maintain a representation of the major stakeholders of Lionheart Charter Academy. In the future, the board will also seek out alumni who may qualify to serve on the board. In the interest of the school maintaining a functional and effective board, the existing board will seek to fill positions within sixty days of vacancy. However, more time may be taken if a suitable replacement is not readily available.

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

Open meetings will be held on the third Wednesday of every month.

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).

New board members will receive and read the book "Charter School Leadership: Elements for School Success" by Cameron Curry. A brief discussion about each chapter will be discussed during the first year as a board. After the first year, new board members will be required to read the book as they take their seats on the board. They will also be required to watch an archived webinar pertaining to board leadership.

In order to prepare our new board for success, the following trainings will be viewed through the National Charter School Resource Center Website:

October 2014:

- All board members will participate in the archived webinar, "School Quality: Pointed Advice and Guidance for Charter School Boards"
- Two board members will participate in the archived webinar, "Financial Management and Fiscal Controls"

November 2014:

- Two board members will participate in the archived webinar, "Charter School Leadership: Elements for School Success"
- Two board members will participate in the archived webinar, "Master Class Two: Legal Issues Impacting the Public Charter"

December 2014:

- Two board members will participate in the archived webinar, "Sector Webinar: Student Discipline Policy and Practices in Charter Schools"

January 2015:

- All board members will participate in the archived webinar, "Finding, recruiting and retaining outstanding charter school board members."
- Two board members will participate in the archived webinar, "Performance Management: Evaluating Charter School Academic Performance"

Subsequent training:

Board members will be required to view two webinars per year pertaining to their board position. They will share learned information with the rest of the board during meetings. As new board members are acquired an assessment of the training needs of new members as well as new trainings designed to keep the current board up to date on human resources, charter school law, special education law, finances, operations and other topics may be required by board members on an as needed basis.

- 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 board will make a good faith effort to identify any existing relationships that could pose actual or perceived conflicts if the application is approved. This will involve a discussion of specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts. The board of Lionheart Charter Academy has adopted bylaws that include a conflicts of interest policy. The policy selected serves the purpose of protecting the interests of Lionheart Charter Academy when the board is contemplating entering into a transaction or arrangement that may benefit the private interest of a board member.

Currently, two special educators are serving on the board. There are plans for the employment of both of these professionals at Lionheart Charter Academy. Lionheart Charter Academy has included in its bylaws that no Board Member may be a paid employee of the school. Board members will receive additional trainings through 2016 to ensure that members are well versed in policies on human resources, charter school law, special education law, finances, operations and other topics that will allow for proper board governance and effective communication, management and operations by the board.

In the event that it becomes evident that a board member is not working to meet the mission and vision of the school and its student population, or a conflict of interest arises, an individual may be removed from the board based on a majority vote by the board members.

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

School policies will be developed through the advice and counsel of the Board of Directors who will vote from time to time on school policies and procedures. Our bylaws state that policies and procedures will be developed and passed by the vote of the majority members of the Board at a meeting in which there exists a quorum. The Lead Administrator will be charged with enforcing any policies and procedures implemented by the Board.

- 8. Describe any advisory bodies, councils, or associations listed in the organization chart or to be formed, including the roles and duties of that body, and the reporting structure as it relates to the school's governing body and leadership.*

There are currently no plans to utilize any outside bodies, councils, or associations to assist in governing the school. We will establish and utilize a Parent Teacher Organization that will function as a typical PTO in that it will work to support the school and the teachers from a volunteer

standpoint.

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

The grievance process for parents and staff members of Lionheart Charter Academy is outlined below.

The complaint should be addressed at the level closest to the origin of complaint. A complaint by a parent regarding a teacher by should be addressed initially to the teacher. If the parent does not receive a satisfactory resolution from the teacher, the parent may then be heard by the Assistant Head of School followed by the Head of School. If the parent still receives an unsatisfactory resolution then it would be appropriate to bring the complaint to the board. At each level of complaint that the parent does not receive a satisfactory resolution, the parent will be informed of the next steps in the grievance process. The initial complaint should be received within 30 days of the incident in question.

It is the responsibility of the board or staff member receiving the complaint to ensure that the parent has followed the appropriate procedures. If the parent has not followed procedures, the staff member can help by directing the parent to the appropriate party.

If a complaint or series of complaints raise a significant issues that affects many families, a committee of both staff and parents may be formed to troubleshoot the issues and make recommendations to the board.

A complaint may not be made to the board without specific documentation to be presented in a board session as permitted by the Open Meetings Law. If a complaint reaches the board level, the board will work to resolve the issue with the parent and if necessary, will vote on a final decision.

When a staff member has a grievance, it is desirable for the staff member and his or her immediate supervisor to resolve problems through free and informal communication. If a resolution cannot be agreed upon in an informal way the staff member can request formal grievance procedures.

A grievance must be filed within 30 days of the incident. The employee must present the grievance in writing to his or her immediate supervisor unless the grievance alleges unlawful discrimination or if the grievance is against the person's immediate supervisor. In this case the staff member can present the grievance to the board of directors.

A meeting will take place within five days of the grievance to discuss possible resolutions. If a satisfactory resolution cannot be made, the employee may appeal the claim to the board of directors.

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.

Lionheart will have a Head of School and Assistant Head of School/Exceptional Children's Director. Both will serve in an administrative capacity overseeing the day to day operations of Lionheart Charter Academy as well as direct supervision of the teaching and support staff. An administrative assistant/bookkeeper will be sought to support the administration. Six special education teachers who are highly qualified in the subject areas they teach will be hired for the 2016-2017 school year. This will provide for a 15:1 ratio of students to teachers. Three teaching assistants will float among the 6 teachers to assist the teachers at designated times or when necessary. Lionheart Charter Academy may contract with the following support staff on an as needed basis, but are not permanent faculty/staff members: A speech therapist and occupational therapist depending on the needs of the students and their IEP stipulations. Cleaning and maintenance staff will also be contracted based on the needs of the school.

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

Lionheart Charter Academy is committed to hiring a highly qualified teaching and support staff with a passion for working with students with Autism Spectrum Disorders. Although ASD falls under the Special Education umbrella, it is a highly specialized field that not all teachers have extensive knowledge in. Many special education teachers would prefer not to work with this particular population as students with high functioning ASD

have greatly varying needs, strengths and weaknesses from students with other types of disabilities. The type of teacher Lionheart seeks to employ is one who has a passion for and is willing to put effort into servicing the whole child. Lionheart's student population will need just as much (if not more) social/behavioral intervention and modeling with an Applied Behavioral Analysis approach, as well as academic support. In an effort to reach educators seeking the opportunity to join an environment rich in a philosophy that extends well beyond the classroom, Lionheart will advertise in regional and local newspapers and publications. It will also post advertisements in print and online at various universities' special education departments. Lionheart will utilize The National Charter Alliance for Charter Schools Jobs Board; and announcements via the Lionheart website and Facebook page to post openings. However, the Lionheart Charter Academy board, feels that one of the best ways to recruit teachers in this field is by word of mouth. Within Guilford county the autism community (network of families, educators in this field and local organizations that serve our target population) is very close knit. The board feels strongly that word of mouth will spread very quickly among our potential pool of employment candidates. It is in providing a working environment in support of what teachers know are best practices for our target population that Lionheart will be able to retain high performers in the field over time.

- 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 Boards primary duties are to govern the school and oversee the Head of School. The Board has a member who will serve as the Head of School upon its opening. Subsequent Heads of School will be hired by the Board. The Board will review staff evaluations conducted by the Head of School at the end of each school year. Also, the board will review recommendations from the Head of School regarding the hiring or dismissal of any employee and will make the final decision in such matters with heavy weight being given to evidence and the recommendations of the Head of School. The Board will have an expectation that all staff members will abide by the the employment policies and procedures agreed upon according to Appendix O and will hold staff members accountable to those standards. The Board will also support staff members in any school employment related function as long as the employee has not violated the policies in place. The Head of School will serve as a liaison between the board and other employed staff members to streamline communication, however, the board will be open to communication from any staff member or stakeholder if the need arises.

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

A committee of Lionheart Board members, the Head of School and or the Assistant Head of School will comprise an interview team that will select qualified applicants. All applicants will be asked to submit a cover letter that states their qualifications and their education philosophy, as well as a resume and the names of three references. After reviewing the resumes, the interview team will decide which candidates to interview and will develop and use an interview rubric designed to learn about teaching philosophies and styles, experience, ability to collaborate with others and willingness to adjust to the culture of Lionheart Charter Academy. The interview process may involve more than one interview session, but will not exceed three sessions. Upon selecting candidates for hiring, background

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checks and detailed reference checks will be conducted. If the interview team is satisfied with the results of those checks, the Head of School will present the teams recommendations to the Board of Director for approval.

Lionheart will not honor tenure or offer guaranteed employment as North Carolina is an employment at-will state. The employee or Lionheart may terminate employment at any time with or without notice as long as there is no discrimination and no violation of applicable federal or state law. Lionheart Charter Academy reserves the right to place an employee on an action plan for performance improvement. The employee may be required to make specific changes and/or adjustments to performance as specified by the Head of School. If following a full and complete review, a teacher's performance is judged to have been unsatisfactory or less than adequate during the period under review, the Head of School may initiate termination of employment procedures as outlined above.

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

All Employees: All employees will begin with a base salary as outlined below. We project 3% annual pay increases subject to successful performance reviews. We will make insurance available to all full-time Administrative and Instructional staff providing a base level of coverage that will be employer paid. Employees may elect to cover family members or obtain enhanced coverage for themselves at their own expense. We will also provide Worker's Compensation coverage as required by law. Employees will be required to acquire 3 full years of employment with the school in order to be eligible for employer contributions to retirement.

In year one our Admin personnel will earn the following annual salaries: Head of School-\$65,000, Assistant Head of School/Exceptional Children's Director-\$45,000, and Clerical \$20,000.

In year one, instructional staff will earn: Lead Teachers-\$40,000, Assistant Teachers-\$20,000.

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

Employee grievances will be handled as follows:

1. Employees with a grievance should follow a chain of command by speaking to a direct supervisor unless the grievance involves the supervisor. In this case the employee can bring their grievance to the Board of Directors.

2. The grievance must be given in writing within 30 days of the incident in question.

3. The supervisor and/or Board will meet with the employee within 5 days of receiving the complaint to gather further information. At this time, possible resolutions will be discussed.

4. If a resolution is not immediately clear, the supervisor and/or Board will further discuss a final decision/solution within 2 weeks of the initial meeting.

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For addition details refer to the parent and employee grievance question under governance.

Employment at Lionheart Charter Academy will be on an at-will basis. Lionheart Charter Academy will provide each employee on or before the first day of work, with a copy of the employee handbook and the employee handbook will be available at the school's front office.

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

The Assistant Head of School/ Exceptional Children's Director will serve a dual role in supporting the Head of School as well as overseeing student IEPs and the IEP process. This person's salary will be based on the overall job description and therefore no additional funding will be allocated for additional duties.

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.*

Lionheart Charter Academy wishes to service a special needs population, and therefore will seek to fill general teaching positions with special educators. As a result, it will not be difficult to service students with learning or developmental disabilities. Further, students with ASD often have 'splinter skills' that don't match their learning profile. It will be important to provide some of our students with gifted enrichment to enhance these skills. Having a primarily special education based staff will make this task easier than it may be in other settings. Related services such as speech therapy and occupational therapy will be contracted as needed according to students' IEPs.

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).*

Head of School:

The selected Head of School will have a minimum educational requirement of a Masters degree in Education and/or Educational Leadership certification, three or more years of experience in Educational Leadership or related leadership role in a business. This person will have experience with planning, implementing and balancing a school or business related budget and will ideally be familiar with non-profit organization operations. Proficiency in collaboration with colleagues, employees and families is necessary. Lionhearts Head of School will have knowledge of Applied Behavioral Analysis intervention strategies for students with Autism Spectrum Disorders, as well as knowledge of Social Thinking curriculum and experience in implementation of the program. The Head will work collaboratively with the board and staff on the development, planning and management of goals, maintain clear records and oversee the total educational program and its compliance with NC Charter School Law. The Head of School will oversee and evaluate the teaching and support staff in conjunction with the Assistant Head of School/Exceptional Children Director. This person will serve as a constant representative of the mission and vision of the school in all settings, provide professional growth opportunities for the staff, establish and develop the school culture while maintaining communication with the board, staff, stakeholders and students.

The Assistant Head of School/Exceptional Children's Director:

The Assistant Head of School/Exceptional Children's Director will have three or more years experience as a special education professional, excellent

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written and verbal communication skills, experience planning and overseeing IEPs and team IEP meetings. It is preferred that this person have knowledge of Applied Behavioral Analysis intervention strategies for students with Autism Spectrum Disorders as well as knowledge of Social Thinking curriculum (Michelle Garcia Winner) and experience in implementation of the program. Responsibilities will include providing effective leadership in developing programs and overseeing the implementation of the programs in the classrooms, working with teachers to meet students' goals, ensuring IEP compliance, maintaining IEP and other records in accordance with local/state/federal policies and assisting the Head of School in the teacher evaluation process. The Assistant Head of School will Provide professional development to the staff as it relates to the schools goals and objectives and will seek out additional support staff that is needed based on student IEPs.

Administrative Assistant

This person will support the school administration with daily operation of the office, data processing duties and management of funds. LCA will seek an individual with three or more years of experience as an administrative assistant, experience with assisting in planning implementing and balancing a school or business related budget, and will possess outstanding written, verbal and human resources skills. Other responsibilities will be to assist in the maintenance of financial records and records for local, state and federal reporting in coordination with the Head of School, oversee the master calendar, building schedule, maintenance and repairs, and student orientation and registration. This person will also coordinate school services and resources such as textbooks, supplies, and hot lunches.

Teacher:

Lionheart Charter Academy will seek teachers who are interested in immersing themselves in a school culture designed to support and scaffold students with ASD into independent adulthood. Teachers will have three or more years of experience as a classroom or EC teacher with additional experience using accommodations and modifications for special needs students, and a NC Professional Educators license. Lionheart Charter teachers will be responsible for using Applied Behavioral Analysis data to plan and set goals for their students. They must also be willing to immerse themselves in the schools common language as it relates to the Social Thinking curriculum (Michelle Garcia Winner) and use it as part of daily instruction and conflict resolution within the classroom community. They will be responsible for working well with colleagues, and understanding their impact on students.

Teacher Assistant:

Teacher Assistants with experience, excellent written and verbal communication, and a record of developing positive relationships with other professionals, students and their families will be sought. Teacher Assistants primary job functions will be to support the teachers by assisting in the supervision, instruction, observation of and documentation of students. They may also be asked to tend to student health care needs. Other responsibilities will include assisting teachers with clerical duties, administering first aid, complying with student IEP objectives and monitoring students throughout the school.

Speech Therapist

Specific job descriptions, required qualifications and responsibilities will

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be developed based upon the contractual scope of work and needs of Lionheart Charter Academy.

Occupational Therapist

Specific job descriptions, required qualifications and responsibilities will be developed based upon the contractual scope of work and needs of Lionheart Charter Academy.

Staff Evaluation and Professional Development

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

The Head of School and Assistant Head of School will maintain professional licensure. They may teach at times. Teachers will maintain licensure, or it may be requested that they seek additional licensure in order to best meet the needs of students.

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

The school administration will provide mentorship or select appropriate mentors from within the staff based on each individuals professional development needs.

Teachers new to the profession will receive a formal orientation and be provided formal mentors. Because of the need to develop common school language based on ABA and Social Thinking (Michelle Garcia Winner), all efforts will be made to pair teachers with mentors who can provide them with support on this specific skills set. Mentors will be encouraged to meet with their assigned novices on an ongoing basis, with sub coverage provided by the Head and Assistant Head of School as needed for peer observation and planning.

Lionheart Charter Academy will seek to hire administrators and staff members that can complement each others professional develop needs in order to minimize the amount of outside expenditure necessary to train staff while the school is still in its infancy. Allowing leadership in the form of mentorship and professional development will increase teacher satisfaction and retention rate as the staff will feel valued and part of the mission and vision of the school.

Teacher evaluation is a mandated duty and responsibility of Lionheart Charter Academy's administration as dictated by the North Carolina State Board of Education. All teachers will receive an annual evaluation based on at least 4 observations throughout the school year. Three of these evaluations will be impromptu evaluations of the day to day operations of the teacher in his or her classroom and will not focus on a lesson designed by the teacher for the purpose of the evaluation. The administration will work collaboratively with the individual teachers to develop personalized professional development plans, which outline their areas of strength and needs for improvement. The administration will conduct informal observations to provide formative feedback over the course of the school year. ABA strategies and Social Thinking (Michelle Garcia Winner) usage will be assessed with a goal of improving the learning environment as well as student achievement and social success.

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Student growth parameters for academic achievement are set by the State of North Carolina, however many of LCA's students will have additional growth goals in non academic areas according to their IEP's. It is the responsibility of each teacher to grow the whole child according to the students IEP goals.

Criminal background checks are required by law and will be conducted before any applicant is offered a faculty, staff, administrative or volunteer position.

The school will follow all federal guidelines to ensure the teaching staff are deemed "highly qualified" per No Child Left Behind standards. Teachers will be required to hold a Baccalaureate degree(or higher) and have experience and licensure in the subject(s) taught. All classroom teachers will be required to hold the exceptional childrens licensure for their teaching assignments and demonstrate subject knowledge and teaching skills in those content areas by passing the Praxis II exams in the core academic areas they teach.

Lionheart Charter Academy will accept "highly qualified" status for teachers from other states, upon submission of documentation that they have such designation (e.g. satisfactory test scores, or National Board Certification, as permissible by No Child Left Behind).

To meet North Carolina state law, a minimum of 50% of Lionheart Charter Academy teachers will hold either a valid continuing North Carolina license that matches their teaching assignment or a temporary North Carolina license, while they work to complete required testing and/or coursework.

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.

Professional development and mentoring will begin during the interview process. All candidates will be questioned about their core beliefs potential to immerse themselves in the schools mission, vision, culture and educational programming. Any strengths and deficiencies will be utilized to develop an initial professional development plan for the school, as well as personalized plans for individual teachers. For example, if a teacher appears to be a great candidate, but lacks knowledge in using ABA and Social Thinking(Michelle Garcia Winner) strategies a professional development plan addressing these skills will be devised. The school administration will select mentors from within the staff based on each individuals professional development needs.

The professional development plan for LCA will be created by a committee comprised of administrators and at least two representatives of the teaching/support staff. Plans will be tailored around staff and student needs. LCA will use information about teacher experience, student assessment scores, and teacher feedback that may outline a staff need. Teachers will operate as a professional learning community to share ideas and educate each other. Teacher to teacher coaching will be supported by the administration so that best practices can be modeled. Teachers will be required to learn about ABA and Social Thinking (Michelle Garcia Winner)

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through administrative training. Professional development days and/or summer trainings will be implemented to keep staff up to date on best practices within the ASD community.

Teachers themselves will utilize their own strengths and resources to share new knowledge and skills with their peers. Teachers will be expected to meet on a regular basis to discuss student work, classroom strategies, problem-solve instructional issues and share best practices. Applied Behavioral Analysis and Social Thinking will be a key focus in training the initial staff on the instructional mode

4. *Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be covered during this induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods.*

The following is based upon the projected calendar for the 2016 school year. This will be the first year of operation so all teachers will be considered as "new" and required to attend Orientation for the purpose of "induction to the Lionheart mission and philosophies" as well as delivery of the instructional methods and strategies that will be essential to educational planning and delivery for our target population. An agenda will be provided to staff through email and US Postal mail by August 1st (or upon hire if later).

August 15, 16: New Teacher/TA Orientation

August 15, 2016

AM: Warm-ups and Introduction of Staff; review of Lionheart Charter Academy target population and mission, purposes, and goals (this will also be discussed in the interview process), overview of class assignments, duties/responsibilities, committees, mentor/mentee assignments, expectations for grade level teaming, subject area meetings, and vertical teaming; as well as other pertinent information for induction into LCA.

PM: Basic Applied Behavior Analysis training, including functional behavior analysis and behavior intervention plans (development, implementation, revision procedures) and effective data for measuring goals and progress in academic and non-academic areas.

August 16, 2016:

AM: Q&A for previous day training; Warm Ups/Staff team building activity; highlighted review of teacher handbook and signature that it has been received; overview of the calendar year; policies and procedures for crisis intervention, emergency plans and drills, lunch, discipline reporting; a global overview of student's projected for the year; Home-base (AA) teacher duties and expectations; Basic training in Executive Functioning and Autism.

PM: Training on Basics of Project Based Learning and assignment of expectations for each staff's involvement; break off session for teacher teams to generate ideas for PBL first quarter.

August 17-19: Professional Development/Induction 9am-3pm.

August 17, 2016

AM: Basics of Social Thinking (Michelle Garcia Winner); presentation of power-points to be provided to students during an extended Morning Home Base (AA) period the first ten school years (teaching students concepts and

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vocabulary of Social Thinking). Note: The class schedule for the first 10 school days will be revised to allow for the extended time in morning home base (AA).

PM: Use of the Social Thinking Curriculum in the classroom; materials for classroom use and visual representations; The mechanics/expectations of applying ABA and Social Thinking (ST) throughout each school day; how ABA, ST, Executive Functioning concepts/strategies and PBL will provide a basis from which students can achieve and excel to meet the Lionheart mission.

August 18, 2016:

AM: Teamtime to review cumulative files, IEPs and 504 plans to prepare for students as well as generation of ideas for differentiation of the curriculum and interdisciplinary theme and how they can use content specific strategies. Note: administration will float through sessions to answer questions and provide feedback. Individual class time for preparation as time permits.

PM: Individual class time for preparation of open house. Administrative walk-throughs for questions and feedback on classrooms.

*Teacher Assistants will attend NCI training for Crisis Prevention and Intervention Training-full day

August 19, 2016

AM/PM: Classroom Planning Time; meetings with administration as needed.

*Teacher Assistants will attend NCI in the AM for completion/certification and assist teachers with classroom set up in the PM.

Notes:

*All teachers will be given a Lionheart Charter Academy Instructional Strategies Guide that contains ASD specific instructional methods and strategies, with examples, upon hire. They will be required to sign a commitment to review these and incorporate these into lesson plans daily/weekly.

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

Professional Development will occur on scheduled Early Release Days and Mandatory Staff Days. In addition, monthly staff meetings will be required, on the first Wednesday of each month (unless otherwise scheduled) for staff communication, review of data for overall school performance measures, as well as staff development deemed necessary by the administration. Teacher assistants will attend professional development with teachers unless a need is found for other training specific to their duties and responsibilities.

The following is a schedule of days/hours for professional development, according to the projected calendar for the 2016 school year, ongoing Professional Development:

September 21st Student Early Release Day for Staff Development: Reading Comprehension and Higher Order Language Acquisition across the content areas

October 5th Student Early Release Day for Professional Development: Schema-based Instruction-Not just for Mathematics

October 31st Mandatory Teacher Workday for Professional Development:

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Inter-disciplinary teaching and PBL Units; Evaluation/lessons learned and Planning for Quarter 2

January 13th Student Early Release Day for Professional Development: Deeper Dynamics of teaching students to be Social Thinkers

February 24th Mandatory Teacher Workday for Professional Development: Awesome Lesson! (teams will present, through the use of various technology and visuals, some of their best lessons including self-reflection on what they might do differently next time.

March 8th Student Early Release Day for Professional Development: Problem-solving and Executive Functioning-moving toward Independence

April 5th Student Early Release Day for Professional Development: Effective remediation based on data.

May 10th Student Early Release Day for Professional Development: Preparing student's for End of Grade tests; how to beat Anxiety

Note:

*Teacher team meetings and Vertical team meetings will not occur as part of professional development; rather, these will be incorporated into teacher planning periods or after-school monthly staff meetings. While monthly staff meetings will only be scheduled monthly, the administration reserves the right to schedule additional meetings as necessary and with one week advance notice, with exception of a highly unusual situation affecting Lionheart students or other emergency.

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)).

There are existing networks for parents of students with Autism Spectrum Disorders in the Piedmont Triad. Lionheart Charter Academy has already reached out to parents through some of these networks. The school will develop a Facebook page and website and will develop an email list through some of these organizations and contacts. Once Lionheart Charter Academy is approved, marketing efforts will be increased through online marketing and distribution of our flyers throughout the following networks and offices.

- Occupational and Speech Therapy offices throughout the Piedmont Triad
- Developmental Pediatrician offices throughout the Piedmont Triad
- The Independence Place

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- Arc of High Point
- Family Support Networks
- The Autism Society Piedmont Triad Chapter
- Autism Unbound
- Guilford County Human Services/Social Services
- Behavioral health offices throughout the Piedmont Triad

Lionheart will market itself as a school of choice to a population of families with very few education options for their children. Although there are some local private schools who offer options for children with learning differences, those schools do not specialize in Autism Spectrum Disorders and related co-morbid conditions. In fact the strategies and processes used for students who are learning disabled can often be detrimental to students with Autism. Lionheart Charter Academy will be the only school of it's kind in the area serving a population of students that are often overlooked or labeled capable enough. These students will have great difficulty finding success outside of school regardless of academic achievement. Lionheart is marketing to families who want more than an academic education for their children because they know that future success will only be achieved if students are provided the skills to develop socially during these critical years.

Because Lionheart is marketing to agencies that serve people of every income level, race and ethnicity in Guilford County, we are confident we will reach a population reflective of Guilford County's demographic composition.

Lionheart Charter Academy's chosen location is in a diversely populated area of Greensboro. This will make LCA more reasonably accessible for people with child care and transportation difficulties.

In compliance with GS 115C.238.29F(g)(5), Lionheart Charter Academy will not discriminate against any student on the basis of ethnicity, national origin, gender or disability. Lionheart will evaluate its population throughout the first year, and adjust marketing efforts if the population is not representative of the general population residing within the local school area.

Marketing to a high functioning autism population will present challenges as the school's and parents' definition of high functioning may vary. For this reason, Lionheart Charter Academy is specifically marketing to families of students with autism who have the ability to graduate from high school through a college preparatory or occupational course of study track and who have the potential to work and live independent lives post high school. Students who are accepted through the admissions process will be carefully evaluated to ensure that they fall within the scope of the mission of the school.

Within the year before the school opening, the board will hold monthly information meetings to explain the mission to potential families. If a lottery is necessary based on the number of applicants it will be done without bias. Once students have been admitted, enrollment packets will be mailed to their homes. The board will continue to hold these information sessions to answer questions of both admitted and potential families throughout the summer prior to opening and into the first few months of the school year to ensure that there is a waiting list of potential applicants

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in the event that some enrolled students are not able to attend.

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.*

Using the Lionheart Charter Academy Facebook page, website and email to local agencies, we will advertise monthly information sessions for parents to create an open forum to ask questions. We will also have a link on the website to an email address for parents to ask questions. The main goal from approval time until the opening of the school is to advertise Lionheart's mission to as wide an audience as possible.

During this period of time, board members will be required to be highly active in the community. This will involve speaking at or advertising during local events to promote Lionheart Charter Academy and its mission. The board will seek to develop relationships with some community agencies interested in supporting Lionheart Charter Academy. There are many local companies and agencies willing to give in a variety of ways to schools supporting students with special needs. These relationships will strengthen Lionheart's presence in the community.

Continuous communication with potential and enrolled families will be critical to Lionheart's success. As progress is made the board will update parents through their open meetings and social media. These updates may include information on facilities, curriculum, class choices, and fundraisers.

Parents and families of our students will be an integral part of Lionheart Charter Academy. Lionheart will include parents on the school improvement committee and there will be at least one parent representative on all committees at the school. There is room for parents involvement at many levels. Lionheart will be seeking family members whose time and talents can benefit the school. These talents may be in the form of serving on the PTO board, working on the lunch committee, providing classroom volunteer hours, sitting on the board, supporting fundraising efforts or simply spreading the word.

A supportive parents population is integral to a school's success therefore, Lionheart will not only be seeking families out for volunteer opportunities, it will also seek out, consider and value the opinions of the families when school related issues are involved. Lionheart will survey parents and invite them to board meetings to voice their concerns and opinions.

By clearly communicating the goals and objective that Lionheart Charter hopes to reach through the mission and vision to it's families, it will ensure that all families are also immersed in and working toward the same goals for the students. When all parties are working toward common goals, a strong supportive environment for student learning will be formed.

Lionheart Charter Academy understands that each family situation is

Lionheart Charter Academy -To develop diploma seeking students with Autism Spectrum Disorders into independent adults through research based education strategies designed to increase academic and social success.

different and that we are working with a population of students whose families are already spread very thin in most cases. Families will know that there is no job too small and that all families are invited to provide whatever time or effort they can to the success of the school.

Admissions Policy

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

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

Lionheart Charter Academy will comply will all applicable federal and state laws related to enrollment and admissions.

In accordance with General Statute 115C-238.29F(g)(5) Lionheart Charter Academy will not discriminate against any student because of ethnicity, gender, disability or national origin. Lionheart will not limit admission to students because of their intellectual ability, athletic ability, race, creed, disability, gender, measures of achievement, national origin or religion.

Open Enrollment

For the first year of operation, open enrollment will begin February 2016. All subsequent years, open enrollment will begin the first day of school and will end at 5:00 on the last business day in March. Open enrollment notices will be posted on the school website, at Lionheart Charter Academy School, in a local newspaper and with local agencies that work with ASD children (ex. Autism Unbound, The Independence Place, etc.).

Application Procedures

Applications will be available on the school's website or school office. Applications may be mailed, emailed or faxed after requesting an application by phone. If the number of applications exceeds our capacity either by grade level or building then students shall be accepted by lottery. If the number of applications does not exceed our capacity then all students will be accepted and a lottery will not be conducted. Applications received after open enrollment has ended will not be eligible for the lottery but will be put at the end of the accepted list and offered placement if space is available after the lottery.

Accepted students must complete a form stating their intent to attend the school within four weeks after acceptance. Parents will be sent letters to remind them of their obligation to state their intent. Once enrolled,

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students are not required to reapply in subsequent years. They will be asked to fill out a re-enrollment form showing intent to re-enroll.

Lottery Procedures

The lottery will be open to the public and all applicants will be notified of place and time. It will be video recorded and that recording will be used if there are any discrepancies. A third party person with no relationship to the school, staff, students or anyone applying to the school will be present. Names will be selected randomly until all seats are filled. Remaining applicants will be selected for the waiting list. Names of those applicants whose applications were received after open enrollment will be added at the end of the waiting list in the order in which they were received.

Enrollment Preferences

Preference will be given to the following applicants:

1. Children of the schools founding board of directors,
2. Siblings of children already enrolled that meet the mission of our school,
3. Children of the schools employees.

PROJECTED ENROLLMENT

2016-17 through 2020-2021

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Guilford County Schools

LEA #2

LEA #3

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

	2016-2017			2017-2018			2018-2019			2019-2020			2020-2021		
	LEA 410	LEA 000	LEA 000	LEA 410	LEA 000	LEA 000	LEA 410	LEA 000	LEA 000	LEA 410	LEA 000	LEA 000	LEA 410	LEA 000	LEA 000
Grade 06	15	0	0	15	0	0	15	0	0	18	0	0	20	0	0
Grade 07	15	0	0	15	0	0	15	0	0	17	0	0	20	0	0
Grade 08	15	0	0	15	0	0	15	0	0	17	0	0	19	0	0
Grade 09	15	0	0	15	0	0	15	0	0	17	0	0	19	0	0
Grade 10	15	0	0	15	0	0	15	0	0	17	0	0	19	0	0
Grade 11	0	0	0	15	0	0	15	0	0	17	0	0	19	0	0
Grade 12	0	0	0	0	0	0	15	0	0	17	0	0	19	0	0
	75			90			105			120			135		

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

Lionheart Charter Academy will encourage parents/guardians to transport their children to and from school. Lionheart Charter will develop a carpool committee to help parents arrange carpools. Transportation will be provided for families who can not transport their children to and from school if carpooling can not be arranged. If a child's parents can't provide transportation due to timing conflicts with work, other arrangements for early arrival child care may be considered.

Our transportation plan is centered around utilizing a technology solution designed to allow the parent population to work together within an application environment to help facilitate a workable carpool system. Online software such as Comovee.com or Carpool School Edition offer low cost methods to manage and facilitate effective carpooling.

In the rare instance that a child's IEP requires transportation and the parent(s)/guardian(s) cannot otherwise utilize the carpool option, Lionheart will contract with an outside company to provide the limited amount of children who would require such an accommodation transportation.

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.

Lionheart Charter Academy will provide lunch by contracting with vendors meeting the nutritional requirements set forth by the USDA in accordance with the National School Lunch Program. Lionheart will seek vendors by soliciting competitive proposals. Possible vendors include: Chick-fil-a, Subway and Elizabeth's pizza. Vendors will be sent information about our school lunch program including nutrition and portion size requirements. They will also receive our contract terms and conditions. All contracts will be approved by the Regional Child Nutrition Consultants assigned to our region prior to sending out initial proposals. Contracts will be submitted for approval again prior to signing and execution. We will work on a monthly cycle menu. Parents will be given monthly menus with options available each day from the vendors with price included. Parents and/or children will select what they want to eat and money will be collected. Children will have the option to bring bagged lunches.

In the event that we have children that would qualify for free or reduced lunch within the LEA, Lionheart will provide a lunch as described above. Funding for said lunches will be financed by charging a small up charge to paying students. We have also budgeted a line item to cover lunch related expenses that exceed revenue generated by the up-charge. Our school is also exploring providing qualifying families with grocery gift cards to be used

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to purchase supplies for bag lunches in the event a child who qualifies for free or reduced lunch has dietary needs that would make an outside vendor provided lunch undesirable.

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

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

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

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$1,000,000		\$4,125.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$5,000.00
Property Insurance	\$500,000		\$1,100.00
Motor Vehicle Liability	\$1,000,000		\$500.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$500.00
Other	\$1,000,000		\$10,900.00
Total Cost			\$22,125.00

*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.

lionheart 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).

Lionheart Charter Academy will be located on the campus of Hunter Hills Evangelical Friends Church at 1201 Merritt Dr. Greensboro, North Carolina. Hunter Hills Church's property consists of three separate buildings. The school building sits apart from the church building and maintains a separate entrance and parking lot. The school will be secular and have no direct affiliation with the church other than tenant/landlord. The church built a school for special needs students on the property several years ago. The building is almost 9000 square feet. It is possible to add four more classrooms on to the existing building. The building is perfect for our purposes. See appendix Q for more details.

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.

We are receiving an extremely favorable lease, especially in years 1-3. In year 1 we are paying \$5.66/sq foot compared to an average of \$10-\$12/sq foot for comparable square footage in our market. The lease peaks at \$9.33 sq foot, still below avg.

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.*

This particular question is non-applicable in our situation. The existing facility we will occupy was built as a school and will immediately meet the spatial needs of our school. Our immediate needs require us to have at least 5 classrooms which we have at the leased facility. Our facility will allow us to be fully operational as a school when the school first opens its doors.

Section V: Operations Concerns and Additional Questions	Reviewer	Page Reference
A carpooling system is not a sufficient transportation system. The school should be specific with the neighborhoods they will target, the transportation routes they will offer and the alternative means of transportation they will seek for their students.	Greg Schermbeck	Transportati
It is not clear whether the transportation plan is aligned to school mission and suitable for target population. The budget does not reflect costs for addressing student transportation. needs.	Tracy Kelley	Transportati
Carpooling may not be the best fit for the school's population. \$5,000 contract transportation budget may not be sufficient for children who may require that the school provide transportation.	Cande Honeycutt	Transportati
"In the rare instance that a child's IEP requires transportation and the parent(s)/guardian(s) cannot otherwise utilize the carpool option, Lionheart will contract with an outside company to provide the limited amount of children who would require such an accommodation transportation." Give careful thought to the utilization of a "carpool" as meeting the requirements of provision of the related service of transportation. I believe that a parent could very well challenge this and would be justified in doing so. Also, be careful of removing this related service from an IEP because of the need to carpool students. Removal would required that the IEP team go	Marie Massengill	Transportati

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through the reevaluation process and then provide documentation on the Prior Written Notice to the parent what data, evaluation was used to make the decision that the student no longer was in need of special transportation to benefit from his/her specially designed instruction.		
my guess is it is more children than expected money for system or for needed buses?	Amy Ruck Kagan	Transportati
The outlined lunch program regarding nutrition and portion size requirements should be included. There is also mention that students will be charged an up-charge to subsidize food for other students who can not afford the daily costs. The school would be cautious with this funding plan as many variables could affect the viability of its longevity.	Greg Schermbeck	School Lunch
The lunch plan may not be appropriate for targeted population.	Cande Honeycutt	School Lunch
It is unclear whether the applicant has considered the specific dietary needs of student population. It is unclear whether chik fil a and subway are appropriate food vendors approved by the state.	Tracy Kelley	School Lunch
The school has secured a facility. However, until lease is signed and a CO for Educational Use is secured, the school should still have a contingency plan.	Cande Honeycutt	Facility and
Appendix R is not attached. Appendix Q states that the school has 6 classrooms or one for each grade level. This layout does not seem to be suitable to house six grade levels. Even if four additional classrooms are built, the school must consider a library, cafeteria and pull-out rooms for small group instruction. A clear contingency plan is also not included.	Greg Schermbeck	Facility and
no contingency	Amy Ruck Kagan	Facility and

Reviewer	Score
Cheryl Turner	
Joe Maimone	
Amy Ruck Kagan	Fail
Becky Taylor	
Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Marie Massengill	
Sherry Reeves	
Tammi Sutton	
Greg Schermbeck	Fail
Tracy Kelley	Pass
Alan Hawkes	
Steven Walker	
Cande Honeycutt	Fail
Phyllis Gibbs	

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

<p>SHOW CALCULATIONS FOR FIGURING STATE AND LOCAL DOLLARS FOR THE PROPOSED CHARTER SCHOOL</p> <p><i>Refer to the <u>Resource Manual Finance Section</u> for guidance on estimated funding amounts</i></p>	<p>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.</p> <ul style="list-style-type: none"> In year 1 – Base state allotments are determined by the LEA in which <u>the student</u> resides In year 2 and beyond- Base State allotments are determined by the LEA in which <u>the school</u> is located. <p>Local Funds: Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.</p> <p>Federal Funds: Charter schools must qualify and apply for the individual federal grants based on their population of students.</p> <p>REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS</p>																					
	<p>LEA #1 410 - Guilford County Schools</p> <table border="1"> <thead> <tr> <th>Revenue</th> <th>2014-2015 Per Pupil Funding</th> <th>Projected LEA ADM</th> <th>Approximate funding for 2016-2017</th> </tr> </thead> <tbody> <tr> <td>State Funds</td> <td>\$4,615.50</td> <td>75</td> <td>\$346,162.50</td> </tr> <tr> <td>Local Funds</td> <td>\$2,343.00</td> <td>75</td> <td>\$175,725.00</td> </tr> <tr> <td>Federal EC Funds</td> <td>\$3,574.51</td> <td>75</td> <td>\$268,088.25</td> </tr> <tr> <td>Totals</td> <td></td> <td></td> <td>\$789,975.75</td> </tr> </tbody> </table>			Revenue	2014-2015 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2016-2017	State Funds	\$4,615.50	75	\$346,162.50	Local Funds	\$2,343.00	75	\$175,725.00	Federal EC Funds	\$3,574.51	75	\$268,088.25	Totals		
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Totals			\$789,975.75																			

Lionheart Charter Academy - To develop diploma seeking students with Autism Spectrum Disorders into independent adults through research based education strategies designed to increase academic and social success.

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	\$346,163	\$424,985	\$499,602	\$575,334	\$652,193
-Local Per Pupil Funds	\$175,725	\$210,870	\$246,015	\$281,160	\$316,305
-Exceptional Children Federal Funds	\$268,088	\$335,807	\$397,417	\$460,732	\$525,789
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$10,000	\$57,000	\$122,000	\$150,000
Z - TOTAL REVENUE	\$789,976	\$981,662	\$1,200,034	\$1,439,226	\$1,644,287

***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.

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	\$65,000	\$65,000	1	\$66,950	\$66,950	1	\$68,958	\$68,958	1	\$71,027	\$71,027	1	\$73,158	\$73,158
Assistant Administrator	1	\$45,000	\$45,000	1	\$46,350	\$46,350	1	\$47,740	\$47,740	1	\$49,173	\$49,173	1	\$50,548	\$50,548
Clerical	1	\$20,000	\$20,000	1	\$20,600	\$20,600	1	\$21,218	\$21,218	1	\$21,855	\$21,855	1	\$22,510	\$22,510
A - Total Admin and Support:	3		\$130,000	3		\$133,900	3		\$137,916	3		\$142,055	3		\$146,216
Instructional Personnel:															
Exceptional Children Teacher(s)	6	\$40,000	\$240,000	7	\$41,200	\$288,400	8	\$42,436	\$339,488	9	\$43,709	\$393,381	10	\$45,020	\$450,200
Teacher Assistants	3	\$20,000	\$60,000	4	\$20,600	\$82,400	4	\$21,218	\$84,872	5	\$21,855	\$109,275	5	\$22,510	\$112,550
B - Total Instructional Personnel:	9		\$300,000	11		\$370,800	12		\$424,360	14		\$502,656	15		\$562,750
A+B = C - Total Admin, Support and Instructional Personnel:	12		\$430,000	14		\$504,700	15		\$562,276	17		\$644,711	18		\$708,966
Administrative & Support Benefits															
Health Insurance	3	\$4,800	\$14,400	3	\$400	\$1,200	3	\$4,800	\$14,400	3	\$4,800	\$14,400	3	\$4,800	\$14,400
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	3	\$628	\$1,884	3	\$647	\$1,941	3	\$667	\$2,001	3	\$687	\$2,061	3	\$707	\$2,121

Lionheart Charter Academy - To develop diploma seeking students with Autism Spectrum Disorders into independent adults through research based education strategies designed to increase academic and social success.

Social Security	3	\$2,687	\$8,061	3	\$2,767	\$8,301	3	\$2,850	\$8,550	3	\$2,936	\$8,808	3	\$3,022	\$9,066
D - Total Admin and Support Benefits:	9		\$24,345	9		\$11,442	9		\$24,951	9		\$25,269	9		\$25,587
Instructional Personnel Benefits:															
Health Insurance	7	\$4,800	\$33,600	8	\$4,800	\$38,400	8	\$4,800	\$38,400	9	\$4,800	\$43,200	10	\$4,800	\$48,000
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Social Security	9	\$2,067	\$18,603	11	\$2,090	\$22,990	12	\$2,193	\$26,316	14	\$2,226	\$31,164	15	\$2,326	\$34,890
Medicare	9	\$483	\$4,347	11	\$489	\$5,379	12	\$513	\$6,156	14	\$521	\$7,294	15	\$544	\$8,160
E - Total Instructional Personnel Benefits:	25		\$56,550	30		\$66,769	32		\$70,872	37		\$81,658	40		\$91,050
D+E = F - Total Personnel Benefits	34		\$80,895	39		\$78,211	41		\$95,823	46		\$106,927	49		\$116,637
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	12		\$154,345	12		\$145,342	12		\$162,867	12		\$167,324	12		\$171,803
B+E = H - Total Instructional Personnel (Salary & Benefits)	34		\$356,550	41		\$437,569	44		\$495,232	51		\$584,314	55		\$653,800
G+H = J - TOTAL PERSONNEL	46		\$510,895	53		\$582,911	56		\$658,099	63		\$751,638	67		\$825,603

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	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Equipment	\$4,800	\$4,800	\$4,800	\$4,800	\$4,800
	Communications & Telephone	\$8,000	\$8,000	\$8,000	\$8,000	\$8,000
	Copier leases	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000
Professional Contract	Speech Therapist	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
	Occupational Therapist	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
	Bc Aba Consultant	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
	Custodial	\$11,000	\$11,000	\$11,000	\$11,000	\$11,000
	Accounting/Audit	\$14,000	\$14,000	\$14,000	\$14,000	\$14,000
	Payroll	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600
Facilities	Facility Lease/Mortgage	\$51,000	\$60,000	\$72,000	\$84,000	\$84,000
Transportation	Contract Transportation	\$5,000	\$6,000	\$7,000	\$8,000	\$9,000
Utilities	Electric	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Gas	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
	Water/Sewer	\$2,400	\$2,400	\$2,400	\$2,400	\$2,400
	Trash	\$2,400	\$2,400	\$2,400	\$2,400	\$2,400
	Cable/Internet	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000
Other	Insurance:Crime \$100,000	\$400	\$400	\$400	\$400	\$400
	Insurance:Contents \$500,000	\$1,100	\$1,100	\$1,100	\$1,100	\$1,100
	Insurance-General Liability \$1,000,000	\$4,125	\$4,950	\$5,775	\$6,600	\$7,425
	Insurance:Workers Comp	\$4,500	\$4,500	\$4,500	\$4,500	\$4,500
	Insurance:Directors & Officers \$1,000,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Insurance:Umbrella \$5,000,000	\$5,500	\$5,500	\$5,500	\$5,500	\$5,500
	Insurance:Auto-Highest Limits	\$500	\$500	\$500	\$500	\$500
	Credit Line Interest	\$5,000	\$10,000	\$0	\$0	\$0
	Reduced Or Free Lunch	\$10,000	\$11,000	\$12,000	\$13,000	\$14,000
	K - TOTAL Administrative & Support Operations	\$202,325	\$219,150	\$223,975	\$238,800	\$241,625
	Instructional:					
Books and Supplies	Instructional Materials	\$50,000	\$60,000	\$70,000	\$80,000	\$90,000
	Testing Supplies	\$3,555	\$4,266	\$4,977	\$5,688	\$6,399

Lionheart Charter Academy - To develop diploma seeking students with Autism Spectrum Disorders into independent adults through research based education strategies designed to increase academic and social success.

Other	Student Web Based Management	\$3,000	\$3,600	\$4,200	\$4,800	\$5,400
	L - TOTAL Instructional Operations	\$56,555	\$67,866	\$79,177	\$90,488	\$101,799
	K+L = M - TOTAL OPERATIONS	\$258,880	\$287,016	\$303,152	\$329,288	\$343,424

Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
J - TOTAL PERSONNEL	\$510,895	\$582,911	\$658,099	\$751,638	\$825,603
M - TOTAL OPERATIONS	\$258,880	\$287,016	\$303,152	\$329,288	\$343,424
J+ M =N TOTAL EXPENDITURES	\$769,775	\$869,927	\$961,251	\$1,080,926	\$1,169,027
Z - TOTAL REVENUE	\$789,976	\$981,662	\$1,200,034	\$1,439,226	\$1,644,287
Z - N = SURPLUS / (DEFICIT)	\$20,201	\$111,735	\$238,783	\$358,300	\$475,260

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.

Student enrollment was projected based on first identifying the total autism population in Guilford County Schools. That number exceeds 1000. In addition to the population currently attending Guilford County Schools, our school will offer parents who currently use private alternatives a superior educational environment developed specifically to educate high functioning children with autism. Based on informal surveying of parents known to have children with autism, we project that we will be in a lottery situation as early as year one. The high functioning population of children with autism fall into a classic educational gap in that they have the capacity to perform at or above grade level but learn differently. Guilford County has enjoyed pockets of exceptional programs designed to teach to this population but two things have happened to change the dynamic. Number one, the population has grown to the extent that it seems to be difficult for the County to develop programs to keep pace with demand. Number two, Guilford County appears to have developed a policy to effectively dismantle programs specific to high functioning children with autism preferring now to group the exceptional children under one umbrella regardless of diagnosis. This cross-categorical approach is likely more efficient at the County level and seemingly equitable in terms of the delivery of services. It is the opinion of our Board and our community's parents, that in order for this population to thrive, there must be an alternative specific to our target population.

The break-even point for our school in terms of student enrollment is 65 students. We can meet our fixed cost obligations with as little as 65 students. As previously stated, our projections indicate that we will not encounter a low enrollment situation.

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

We recognize that Year One will present our largest budgeting challenge because Federal EC funds will not be available until April of the first school year. We will operate the school in year one with a conservative budget to ensure that we can operate without relying on the initial EC funds. Our board is fortunate to have qualified grant writers that will

begin immediately to secure supplemental funding. In addition, we will immediately begin supplemental fund raising actions to ensure financial stability. Upon approval of our initial application, we also intend to secure an operational line of credit. Please note that we have provided a commitment letter in Appendix S for said line of credit up to \$300,000. Because we project larger budget surpluses in subsequent years, borrowing money in year one will not be problematic. We will also look for every possible way to supplement our revenues by applying for all applicable Federal and State grant money such as Title 1 funds.

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

Our school does not RELY on supplementary funds and will be able to operate on known funding sources as outlined in the budget. Our school will have the opportunity to exceed revenues in some cases and will seek additional funding from related service Federal grants and Medicaid reimbursements to the extent our students are eligible. We recognize how tenuous it is to rely on funds other than State and LEA funds and have fashioned our budget in such a way as to remain solvent assuming no additional revenue other than known and predictable sources.

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

15:1

- 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.*

Our school will contract with an outside accounting firm to perform our audits as required by law. Our model is unique in that we intend to service a population of exceptional children. Because of our model, every teacher and assistant will be versed in the education of exceptional children. We intend to contract with private providers to perform specialty functions such as Occupational and Speech Therapies as outlined in our budget. The selection of professionals contracted to perform services on behalf of our students will be made from professionals known to have experience in working with children with autism and are highly qualified in that area.

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

Our budget is specifically designed to meet the needs of the school. In answer to the specific questions outlined in the question, please note the following:

Mission: Our budget addresses the unique academic needs of our student population. A low student/teacher ratio is critical to the success of our population and our budget is designed to maintain a 15:1 ratio. Additionally, focusing financial resources on materials specific to the needs of children with autism will increase the probability that our students are able to perform at a high level on traditional tests and be prepared for college in a traditional environment.

Curricular Offerings: Our budget addresses the technology and physical

material needs of our teachers enabling them to provide a tailored curriculum using the methods outlined in our application.

Transportation Plans: Our transportation plan is centered around utilizing a technology solution designed to allow the parent population to work together within an application environment to help facilitate a workable carpool system. Online software such as Comovee.com or Carpool School Edition offer low cost methods to manage and facilitate effective carpooling. While state law does not require Charter schools to provide transportation, because our school focuses on children who will likely have an IEP, we recognize that our school may be required to provide transportation to certain students. We expect the population of students who would need transportation services outside of our stated plan to be extremely limited. That being said, we have budgeted for the transportation of students who would need additional transportation services.

Facility Needs: Our budget recognizes the expense of managing and operating a suitable facility to run a school. We have utilized conservative budget numbers to ensure that our facility related expenses are not over budget. By leasing space, we are able to limit the potential for disastrous surprise out of pocket expenses related to the facility. We will also be insured at levels so as to minimize any major financial impact to the school in the event of major facility damage or repairs.

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.

Our school will seek to maintain a minimum 2 month operating balance in our general fund. From a percentage standpoint, we will use a calculation based on a 9 month core operations calendar meaning that we will maintain an operating balance equal to 2/9 of our budget or approximately 22 percent. As previously discussed year one will be the biggest challenge. Because we have a commitment for a line of credit and because we will be entitled to Federal EC funds due to our unique population, the challenge will be met. As our population grows, we will allocate a minimum of 50% of our annual surplus budget to working capital that will be available for general fund use if necessary. We will meet our fund balance goal in year two of operations based on normal revenues and our our growing working capital funds.

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

Beyond our allocated funds revenues, our school will use a line of credit to supplement year one operating expenditures until the Federal EC funds come in and until we achieve our reserve general fund balance. Based on our available resources and infrastructure plans, the only lease we are currently entertaining is a small expense for a copier lease. While we have plans to "upgrade" our already available physical assets (desks, tables, chairs) we do not currently plan to finance those purchases. We believe it important for our school to minimize interest expenses to the extent we are able.

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

Our building will be leased (lease attached). Our site was operated as a private school for a few years and as such has enough physical assets available to us to operate as a school today. Although we plan to upgrade much of what is available on site, we will do so as cash is available. We also anticipate capital expenditures to upgrade the playground area for the school. We do not view any such upgrades as vital to our operations and will accomplish those upgrades with contributions or grants.

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 school will utilize the services of a CPA firm to perform annual audits as required by law. In addition, the Board will review financials on a monthly basis in Years 1-3 and shift to quarterly as the school matures. The Board's review will include a review of the monthly reconciliation and physical inspection of the bank statement(s) and processed checks. A payroll company will be used to ensure that no single school staff person will have the opportunity to negatively affect the school's most expensive budget item. Policies will remain in effect that limit any school personnel from initiating transactions over specified dollar amount without prior board approval. Adequate safeguards will also be initiated at the banking level to include not allowing check-cards or wire transfers. The Board will closely monitor and maintain an inventory of physical assets in years 1-3. It is anticipated that the Board will transfer physical inventories to an outside firm in year 4 as the school grows.

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

None. Our Board is committed to being good stewards of the schools assets. No Board member will be permitted to be a paid employee or contractor. Any work performed by a Board member for the school will be pro bono in nature and be considered a donation to the school. Our Board is fortunate to have members in a number of different disciplines who will donate time and services. While it is anticipated that some of the Board members will become employees of the school, it is our policy that any Board member who applies for a position must first resign from the Board.

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.

Smith Leonard PLLC
4035 Premier Drive, Suite 300
High Point, NC 27265
336.883.0181
contactus@smithleonardcpas.com

Section VI: Financial Plan Concerns and Additional Questions	Reviewer	Page Reference
Again, additional information should be gathered regarding the plan to meet projected enrollment numbers.	Greg Schermbeck	Budget Reven
Revenue is not realistic due to the enrollment projections.	Cande Honeycutt	Budget Reven
The budget revenue projections will depend largely on ensuring that projected student enrollment is hit. Close attention should be paid to the student enrollment and recruitment plan. Also, a term sheet for a line of credit is attached but does not guarantee the money will be lent.	Greg Schermbeck	Total Budget
Working capital assurance letter does not match the amounts listed. Revenue projections unrealistic based upon enrollment projections.	Cande Honeycutt	Total Budget
There are not enough staff to provide the legally required components listed in the education program, both tracks of study, and compensation is low for staff who, in order to meet the legal requirements of licensure to provide the proposed services, will need to have multiple areas of very specific licensure. No retirement benefits. Medicare for 3 administrators higher than for 9 staff. There may be errors in this section.	Cande Honeycutt	Personnel Bu
An assistant administrator will likely not be needed for the first year. It is unclear what the specific roles of an assistant administrator would be with only 75 students.	Greg Schermbeck	Personnel Bu
I see no staff for areas such as art, music, PE, etc. Will these be contracted or not offered?	Marie Massengill	Personnel Bu
concerned about expectations of EC staff and salaries	Amy Ruck Kagan	Personnel Bu
Potentially insufficient allocations for EC related services. Transportation insufficient. No marketing budget. No professional development budget. No line for technology.	Cande Honeycutt	Operations B
The following budget items should be addressed: Transportation - \$5,000 - This is a minimal amount to set aside for transportation. The school must dive into greater detail regarding a realistic transportation plan. Instructional Materials - \$50,000 - The school should provide more information to how the \$50,000 will be spent on instructional materials. Copy Paper - Not listed - No funds are set aside for copy paper. It is unclear how the basic functions of a school will operate without copy paper. Staff Development - Not listed - No funds are set aside for staff development.	Greg Schermbeck	Operations B
low cost for BC ABA consultant low custodial low payroll transpiration costs low what is in instructional material costs? no computer costs/IT no marketing or PD	Amy Ruck Kagan	Operations B
The transportation costs are not realistic given the special student population.	Tracy Kelley	Operations B
The budget is deficient in too many areas to be addressed by the surplus. If a student required 1:1 instruction or the other costs would be addressed, this budget would have a serious deficit in year one.	Cande Honeycutt	Total Expend
need more info about surplus ranges	Amy Ruck Kagan	Total Expend
A \$20,000 surplus is very minimal and will likely be spent. Extreme detail should be provided regarding the financial stability of the school and if it's possible to open on such a limited budget.	Greg Schermbeck	Total Expend
Please describe staff projections given the small student enrollment and how revenues will be supplemented to operationalize the proposed plan.	Tracy Kelley	Total Expend

Lionheart Charter Academy - To develop diploma seeking students with Autism Spectrum Disorders into independent adults through research based education strategies designed to increase academic and social success.

<p>More information should be requested the demand and legality of opening charter school that only admits students with autism. The application states that 1000 students in the county have autism but it's unclear if those students are properly being served or actively seeking another school.</p> <p>A financial contingency plan is listed but needs more detail. Fundraising and grant writing is mentioned however no clear plan or amount of funds are specified. Again, with only a \$20,000 surplus extreme caution should be used when evaluating the financial stability of the school.</p>	Greg Schermbeck	Budget Narra
<p>The contingency plan is insufficient to meet the potential budget shortfall to meet program objectives.</p> <p>A line of credit is still money owed and could present significant problems should the school fail to meet enrollment or incur additional expenses outside of the projected budget.</p>	Cande Honeycutt	Budget Narra

Reviewer	Score
Cheryl Turner	
Joe Maimone	
Amy Ruck Kagan	Fail
Becky Taylor	
Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Marie Massengill	
Sherry Reeves	
Tammi Sutton	
Greg Schermbeck	Pass
Tracy Kelley	Pass
Alan Hawkes	
Steven Walker	
Cande Honeycutt	Fail
Phyllis Gibbs	

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).

lionheart

Date: 09/24/2014

Applicant Signature:

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

Print/Type Name: lionheart

Board Position: Heather B. Pardue, President

Signature: _____

Date: 09/24/2014

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
4	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>

Mission, Purposes, and Goals	- cande_honeycuttk2
Education Plan	- cande_honeycuttk2
Governance and Capacity	- cande_honeycuttk2
Operations	- cande_honeycuttk2
Financial Plan	- cande_honeycuttk2
OVERALL	- cande_honeycuttk2 - dtsmith840 - cande_honeycuttk2

External Evaluator

Mission, Purposes, and Goals	<p><u>Mission Statement</u> now enrollment makes a bit more sense broad spectrum of challenges to serve - aruckkagan</p> <p><u>Educational Need and Targeted Student Population</u> Insufficient evidence provided to demonstrate full demand for proposed school. Sample survey statements does not constitute as evidence as commitments for 75 students. - cande_honeycuttk2</p> <p><u>Educational Need and Targeted Student Population</u> Of the 1054 students in Guilford County identified as Autistic, all should be contacted regarding if their educational needs are being met and if they would be interested in attending a new charter school focused on serving students with autism. Again, the Charter School team should gather a better understanding of if such a small school is financially viable while still being able to serve their projected numbers. The attached evidence of educational need is noble however only lists quotes from different community members. Additional information including the number of people polled and percentages of responses to questions relating to a charter school serving autistic children would be beneficial. - gscherbeck</p> <p><u>Educational Need and Targeted Student Population</u> Evidence presented supporting of need for the school model is less than compelling. Likely, financial viability of the school program is dubious. There is not a clear articulation of sufficient interest in the school, sufficient demand for the school model and prospective student data is not disaggregated by where students fall along the spectrum. while there is a description of outreach activities they are not designed to reach a broad enough audience. It is unclear whether outreach activities are sufficient to ensure equal opportunity to enroll. - kellestracy</p> <p><u>Purposes of Proposed Charter School</u></p>
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	<p>Purpose does not address students on the lower-performing students on the autism. The school should be prepared to provide a full continuum of services for all enrolled students as the needs for children with ASD can vary widely. - cande_honeycuttk2</p> <p><u>Purposes of Proposed Charter School</u> The evaluation criteria are met for the fifth legislative purpose however additional information should be gathered that satisfies additional purposes. - gscherbeck</p> <p><u>Purposes of Proposed Charter School</u> more detail could be provided less on outcomes, more focus on changing the expectations for students - aruckkagan</p> <p><u>Purposes of Proposed Charter School</u> Applicant addresses just 1 purpose, attempts to satisfy additional purposes should be explored to ensure a broader impact. - kellestracy</p> <p><u>Goals for the Proposed Charter School</u> PTO committees are inappropriate. The board and administration should be responsible for those areas.</p> <p>How will academic goals be measured beyond EOG/EOC? What constitutes as one year of growth?</p> <p>Budget goals are generic.</p> <p>Governance goals are generic and lack quantitative measurements. There is a heavy reliance on surveys. - cande_honeycuttk2</p> <p><u>Goals for the Proposed Charter School</u> Operations, governance and finance goals are not SMART. The governing board is not reasonable for gathering data--indicates a lack of understanding pertaining to role and responsibility of school leader, staff, and board. Student perf goals are not sufficient. - kellestracy</p> <p><u>Goals for the Proposed Charter School</u> goals need development not specific or measurable governing board should not be collecting data - aruckkagan</p> <p><u>Goals for the Proposed Charter School</u> The academic goals are noble, but I'm unclear on the testing logistics and requirements for autistic students.</p> <p>"Students on grade level will show 60% proficiency or academic growth on end of grade testing in the first two years." This goal is unclear on if 60% proficiency is the bar or just growth. If growth, how much? Also, 60% is generally a low metric and I'm not sure if the bar should be lowered for students with autism. - gscherbeck</p>
<p>Education Plan</p>	<p><u>Instructional Program</u> The education plan includes Direct Instruction and Expeditionary Learning, two opposite approaches to teaching and learning. How will these methods of instruction work cohesively to serve students with ASD?</p>

	<p>What benchmarks tests will be used to guide insruction? - cande_honeycuttk2</p> <p><u>Instructional Program</u> Additional information should be provided regarding assessment strategies. Benchmarks and state exams are not sufficient.</p> <p>Documented evidence regarding the proposed approach or examples where this is successful is not included. - gscherbeck</p> <p><u>Instructional Program</u> using DI, interative instruction and EI- expensive, challenging, need specific mapping and a lot of thought still unclear how all programming will benefit target population - aruckkagan</p> <p><u>Curriculum and Instructional Design</u> Fifteen to one ratio is not appropriate for all students with ASD. What about students who may require a 1:1 or other more intensive services? Budget does not align with plan in that there is no budget for increased services and no budget for any technology that would be used within the classroom or for the world languages component. Not enough funds allocated for the services that may be appropriate for a variety of needs. Six teachers would not be adequate when consideraion of required licensure for EC services in middle and high school. Concern that the school would be providing Future Core and Occupational track with only six teachers. Both tracks require specific certification especially when addressing EC licensure. The school does not have a budget for techology and would not have sufficient means to provide for virtual education as a supplement to the standard curriculum. - cande_honeycuttk2</p> <p><u>Curriculum and Instructional Design</u> The academic calendar is attached and well-done.</p> <p>The learning framework and sample course of study are attached and provides ample information and detail.</p> <p>Graduation requirements are attached as B2 however it does not list any electives or full range of programs. - gscherbeck</p> <p><u>Curriculum and Instructional Design</u> still concerned how it all works together - aruckkagan</p> <p><u>Special Programs and "At-Risk" Students</u> No funding for qualified staff to provide ELL and AIG programming. How will the school ensure that ELL students are served by a qualified teacher? How will AIG students received instruction in accordance with this plan if the school has no staff budgeted? - cande_honeycuttk2</p> <p><u>Special Programs and "At-Risk" Students</u> The strategy of identifying gifted students is clear however a plan for how instructing will differ is not included. Additional detail should be provided regarding how the day to day instruction will be altered for gifted students. - gscherbeck</p> <p><u>Special Programs and "At-Risk" Students</u> "During weekly teacher team meetings, facilitated by the Exceptional Children's (EC) Director, each student's performance will be briefly discussed by the team to determine</p>
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	<p>prevention/intervention needs" It would not be appropriate for the EC Director to be routinely facilitating discussions of regular ed. students.</p> <p>" the broad educational strategies of ABA and Social Thinking (developed by Michelle Garcia Winner) are being used," The practices of MG Winner are referenced often in the charter. What is the plan if this does not work w/a student or more than one student? - marie_massengill</p> <p><u>Special Programs and "At-Risk" Students</u> examples of interventions? how will gifted students' programs be differentiated? ELL- broad strokes, no detail - aruckkagan</p> <p><u>Exceptional Children – Identification and Records</u> School cannot pre-screen candidates by requiring records or diagnosis of any kind. This section does not align with the admissions section later in the application.</p> <p>How will the school follow Child Find procedures? The school cannot assume all children will come with a 504 or IEP. - cande_honeycuttk2</p> <p><u>Exceptional Children – Identification and Records</u> Chartering a school of EC identified students is problematic. It essentially becomes a public separate school, therefore, eliminating the ability to provide a full continuum of alternative settings, which is required by IDEA. Even with the 504 student enrolled it will be virtually impossible for this school to offer all levels on the curriculum.</p> <p>"The Exceptional Children's (EC) Director will meet with each parent seeking enrollment in regard to appropriateness, adhering to our mission, and determining EC services needed." What is meant by "appropriateness" and one person cannot "determine EC service needed" this is determined by an IEP team. If the student comes with an IEP, comparable services are required to be provided.</p> <p>"based on our target population, it is anticipated that students will have an IEP or 504 plan; it would be highly unusual that they would not. If, however, a student who enrolls does not have an IEP or 504 plan, the EC Director will oversee monitoring of these students" - this statement is problematic. It is not appropriate to have the EC Director monitor students who have not been identified as eligible for special education. This looks like predetermination that the student is in need of these services and will be referred.</p> <p>"If it is then determined that the student is in need of further psychoeducational evaluation, by an IEP team, a request for formal testing will be made to the student's LEA home school." Once the student is enrolled in Lionheart, then Lionheart is the student's home school. The previous school district is no longer responsible for any needed evaluations, screening, etc. That responsibility is now Lionheart's. - marie_massengill</p> <p><u>Exceptional Children – Identification and Records</u> who beyond EC is doing this work? - aruckkagan</p> <p><u>Exceptional Children – Education Programming</u> How does this educational plan assure that children are receiving FAPE?</p>
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	<p>How does this plan ensure that children of all needs on the ASD spectrum are being adequately served? - cande_honeycuttk2</p> <p><u>Exceptional Children – Education Programming</u> There are no support mechanisms described to ensure students receive a FAPE. - gscherbeck</p> <p><u>Exceptional Children – Education Programming</u> "By enrolling a student in Lionheart Academy, parents are placing their child by choice into a school setting designed specifically for students with an Autism Spectrum Disorder. Therefore, they are recognizing that their child/teen will not be taught in an inclusive classroom with non-disabled peers and IEP's will be revised accordingly to reflect that the student is being taught in a separate setting environment." Changing a student's IEP to "fit" what is offered at the school is referred to as changing it for "administrative convenience" and is noncompliant. As a reminder, this concept will not afford the offering of a full continuum which is required by IDEA. The IEPs will all be for public separate, which is acutally more restrictive than separate. Students served in separate settings have the opportunity to have educational experiences with non-disabled peers, such as lunch, art, music, PE, and selected academics. This is essentially impossible in a school that whose student population made up of EC identified students. There would not be enough 504 students to make the difference. This also brings up the question of who will serve as the "regular education teacher" of the child on the IEP team. "we feel confident that most all students will be able to access the classroom setting/school environment for their Free and Appropriate Public Education" - keeping in mind that the classroom setting will be an EC classroom. No opportunity for accessing a regular education classroom for academics.</p> <p>There was an indication that more space was needed to complete this portion of the charter application but I did not find any more info. - marie_massengill</p> <p><u>Exceptional Children – Education Programming</u> no range of services prodded - aruckkagan</p> <p><u>Student Performance Standards</u> How will this school provide both Future Ready and Occupational track with the budget provided? Occupational track is a completely separate education program with stringent requirements. Not enough teachers/staff to implement both programs with fidelity. - cande_honeycuttk2</p> <p><u>Student Performance Standards</u> Performance goals do not include specific goals for grade levels or specific content exams. Clear goals and metrics should be set in order for teachers and students to have clear sense of what they are working towards. - gscherbeck</p> <p><u>Student Performance Standards</u> how are they measuring growth and improvement? no other assessments? state end of year tests? - aruckkagan</p> <p><u>Student Conduct and Discipline</u> Handbook does not contain a thorough discipline plan that oulines expectations for student conduct. Insufficient information to determine the processes and policies for this school. - cande_honeycuttk2</p>
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	<p><u>Student Conduct and Discipline</u> " If a behavior intervention plan already exists, it will be revised." I would add the term "as needed" or "as warranted" to this statement.</p> <p>I think this section, given the fact that Lionheart Academy is being chartered for EC students, is inadequate. It does not even have the statement that all Federal and State laws regarding the discipline of students with disabilities will be followed. I think there needs to be some more thought and work need to be put into the very high priority section, exp. considering the category of students that are being targeted. With the information provided I think there will be high issues that will arise. This is not preparing them. - marie_massengill</p> <p><u>Student Conduct and Discipline</u> how will they track, know it's working or know they need to adjust? although there is a need for discretion with this population, broad and open - aruckkagan</p> <p><u>Student Conduct and Discipline</u> Applicant has provided some information about student discipline but does not address how expulsion or suspension will be handled in a way that is aligned with stated mission and with sufficient detail and specificity. It is unclear whether or not the student discipline policies as presented are in complacence with applicable laws. Student handbook was blank. Overall, the applicant did not provide sufficient details in order to determine the extent to which there is a shared vision for promoting, enhancing and sustaining a positive school climate. There was no articulation of policies promoting the development and sustainability of social, emotional, ethical, intellectual skills knowledge, dispositions, or a comprehensive system to address barriers to learning and teaching and student engagement. - kelleltracy</p> <p><u>Student Conduct and Discipline</u> Student conduct and discipline is mentioned yet a thorough plan or framework is not provided. The application should state specific consequences for specific student actions that are clearly understood by both students and teachers. Further, a complete student conduct system should be put in place that encourages and rewards positive students behavior and choices. A draft handbook is provided however it is lacking great detail. - gscherbeck</p>
<p>Governance and Capacity</p>	<p><u>Tax-Exempt Status 501 (c)(3)</u> Not required at this time. - cande_honeycuttk2</p> <p><u>Tax-Exempt Status 501 (c)(3)</u> Not selected because tax-exempt status has not been met. - gscherbeck</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> While the narrative contains this information, the bylaws do not specify a minimum number of board members. The board should state a minimum and maximum number of board members to avoid governance issues should the number of board members drop to three or fewer. This would directly affect the quorum and potentially put authority in the hands of one-two individuals. Action without meeting is not legal. Term limits for initial board members not specific enough. Almost half of the board members are slated to be employees of the school. How will the</p>

	<p>board provide continuity in recruiting of other members, address adequate board terms and training, etc.? - cande_honeycuttk2</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> An organizational chart is listed however greater detail should be provided regarding how teachers will function as teams and how leadership will flow throughout the teachers, content teams, and grade levels.</p> <p>Appendix J & K are not attached. - gschermebeck</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> what does it mean to govern? head of school's financial/operational expertise? evaluation? what types of skills are they looking for? need seats filled upon approval - aruckkagan</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> The org chart is not clear with regard to roles, responsibilities pertaining to exceptional children's director (ECD) and principal. Please clarify how Head of School (HOS) and ECD will interact with teachers, office staff, parents and therapeutic staff; and how will teachers interact with therapeutic staff and how will families interface with school leaders? HR policies should already be developed and same for evaluation criteria for HOS and how will therapeutic staff be evaluated and by who and against what evaluation criteria. Please describe the process for transitioning to an official board from a founding board, especially given that the HOS is currently a founding board member. Application does not include a plan for evaluating the Board. - kellestracy</p> <p><u>Proposed Management Organization (EMO/CMO)</u> NA - cande_honeycuttk2</p> <p><u>Proposed Management Organization (EMO/CMO)</u> Nothing was selected because it is not applicable. - gschermebeck</p> <p><u>Projected Staff</u> The school cannot adequately provide for the educational programming outlined with six teachers and offer a full continuum of services by qualified staff for all children with ASD. - cande_honeycuttk2</p> <p><u>Projected Staff</u> Qualifications are listed in the next section. - gschermebeck</p> <p><u>Projected Staff</u> Staffing plan lacks details sufficient to operationalize the proposed school model. - kellestracy</p> <p><u>Staffing Plans, Hiring, and Management</u> The school states that they will seek general educators with EC licensure, but in budget and proposed positions states that they will have six EC teachers. Plan to hire and retain is limited and does not provide enough specifics on how this school will hire and retain teachers with the appropriate credentials to fulfill legal requirements and those set forth in the educational plan. Handbook is mostly generic and does not provide the specificity</p>
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	<p>needed as a solid employment document.</p> <p>Lack of retirement benefits may substantially hinder school's ability to hire and retain quality staff. - cande_honeycuttk2</p> <p><u>Staffing Plans, Hiring, and Management</u> A minimal plan for recruiting teachers is explained. There is no mention of how the school plans to retain high-performing teachers.</p> <p>The employee handbook is attached however it is minimal and should provide a greater level of information for employees. - gscherbeck</p> <p><u>Staffing Plans, Hiring, and Management</u> Word of mouth is not an effective teacher recruiting strategy, especially given the specialized needs of the school. - kellelytracy</p> <p><u>Staff Evaluation and Professional Development</u> No budget for professional development. Limited budget for ABA consultant. - cande_honeycuttk2</p> <p><u>Staff Evaluation and Professional Development</u> The plan for professional development and mentorships needs a large amount of additional work. Currently, the application lists different aspects of professional development, mentorship, and evaluation however a clear plan is not outlined. Simply sharing strengths and resources should not be considered as part of a professional development plan. Targeted sessions, per month, are listed however many of these skills should be instilled teachers before students arrive - not throughout the year. - gscherbeck</p> <p><u>Staff Evaluation and Professional Development</u> what data will they be using for guiding PD? staff development is not fully developed With ABA such a big part, difficult to imagine mentorship being the appropriate avenue - aruckkagan</p> <p><u>Staff Evaluation and Professional Development</u> Applicant does not include a PD sufficient to asses. - kellelytracy</p> <p><u>Marketing Plan</u> No marketing budget. - cande_honeycuttk2</p> <p><u>Marketing Plan</u> More detail is needed in this plan. The plan should include benchmarks for student enrollment, canvassing events and dates, and a projected number of families that will be contacted. This level of detail will help to ensure the projected student enrollment numbers are met. - gscherbeck</p> <p><u>Marketing Plan</u> very concerned about marketing to high functioning population who have the ability- who is making that determination, what does that look like? who will this evaluation take place? legalities? - aruckkagan</p> <p><u>Parent and Community Involvement</u></p>
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	<p>Specific plans for communication should be included. The schools FB page and email blasts will not be sufficient. Monthly parent meetings are important however the school should consider how communication will take place in-between those meetings and for families who are without internet access. - gscherbeck</p> <p><u>Admissions Policy</u> Admissions policy does not match other areas of the application which limits enrollment to children diagnosed with ASD. - cande_honeycuttk2</p> <p><u>Admissions Policy</u> Processes and policies are clear however it is not clear how the school will proceed if a majority of applications are considered general population and not autistic. Additional information should be gathered regarding if the school will be able to properly serve all students. - gscherbeck</p> <p><u>Admissions Policy</u> need to check on their recruitment before being ok with enrollment - aruckkagan</p> <p><u>Projected Student Enrollment (Table)</u> Projected enrollment unrealistic based upon the evidence submitted. - cande_honeycuttk2</p> <p><u>Projected Student Enrollment (Table)</u> The table is complete however more work should be done to determine if the school can be financially stable with only 75 students populating 5-grade levels. - gscherbeck</p> <p><u>Projected Student Enrollment (Table)</u> School sustainability is precarious as the small school size will be difficult to manage. - kellestracy</p>
<p>Operations</p>	<p><u>Transportation Plan</u> Carpooling may not be the best fit for the school's population. \$5,000 contract transportation budget may not be sufficient for children who may require that the school provide transportation. - cande_honeycuttk2</p> <p><u>Transportation Plan</u> A carpooling system is not a sufficient transportation system. The school should be specific with the neighborhoods they will target, the transportation routes they will offer and the alternative means of transportation they will seek for their students. - gscherbeck</p> <p><u>Transportation Plan</u> "In the rare instance that a child's IEP requires transportation and the parent(s)/guardian(s) cannot otherwise utilize the carpool option, Lionheart will contract with an outside company to provide the limited amount of children who would require such an accommodation transportation." Give careful thought to the utilization of a "carpool" as meeting the requirements of provision of the related service of transportation. I believe that a parent could very well challenge this and would be justified in doing so. Also, be careful of removing this related service from an IEP because of the need to carpool students. Removal would required that the IEP team go through the reevaluation process and then provide documentation on the Prior Written Notice to the parent what data, evaluation was used to make the decision that the student no longer was in need of special transportation to benefit from his/her specially designed instruction. - marie_massengill</p> <p><u>Transportation Plan</u> my guess is it is more children than expected</p>

	<p>money for system or for needed buses? - aruckkagan</p> <p><u>Transportation Plan</u> It is not clear whether the transportation plan is aligned to school mission and suitable for target population. The budget does not reflect costs for addressing student transportation needs. - kelleytracy</p> <p><u>School Lunch Plan</u> The outlined lunch program regarding nutrition and portion size requirements should be included.</p> <p>There is also mention that students will be charged an up-charge to subsidize food for other students who can not afford the daily costs. The school would be cautious with this funding plan as many variables could affect the viability of its longevity. - gscherbeck</p> <p><u>School Lunch Plan</u> It is unclear whether the applicant has considered the specific dietary needs of student population. It is unclear whether chick fil a and subway are appropriate food vendors approved by the state. - kelleytracy</p> <p><u>School Lunch Plan</u> The lunch plan may not be appropriate for targeted population. - cande_honeycuttk2</p> <p><u>Facility and Facility Contingency Plan</u> Appendix R is not attached. Appendix Q states that the school has 6 classrooms or one for each grade level. This layout does not seem to suitable to house six grade levels. Even if four additional classrooms are built, the school must consider a library, cafeteria and pull-out rooms for small group instruction. A clear contingency plan is also not included. - gscherbeck</p> <p><u>Facility and Facility Contingency Plan</u> no contingency - aruckkagan</p> <p><u>Facility and Facility Contingency Plan</u> The school has secured a facility. However, until lease is signed and a CO for Educational Use is secured, the school should still have a contingency plan. - cande_honeycuttk2</p>
<p>Financial Plan</p>	<p><u>Budget Revenue Projections from Each LEA (Table)</u> Revenue is not realistic due to the enrollment projections. - cande_honeycuttk2</p> <p><u>Budget Revenue Projections from Each LEA (Table)</u> Again, additional information should be gathered regarding the plan to meet projected enrollment numbers. - gscherbeck</p> <p><u>Total Budget Revenue Projections 2017-2021 (Table)</u> Working capital assurance letter does not match the amounts listed.</p> <p>Revenue projections unrealistic based upon enrollment projections. - cande_honeycuttk2</p> <p><u>Total Budget Revenue Projections 2017-2021 (Table)</u> The budget revenue projections will depend largely on ensuring that projected student enrollment is hit. Close attention should be paid to the student enrollment and recruitment plan.</p> <p>Also, a term sheet for a line of credit is attached but does not guarantee the money will be</p>

<p>lent. - gscherbeck</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> There are not enough staff to provide the legally required components listed in the education program, both tracks of study, and compensation is low for staff who, in order to meet the legal requirements of licensure to provide the proposed services, will need to have multiple areas of very specific licensure. No retirement benefits. Medicare for 3 administrators higher than for 9 staff. There may be errors in this section. - cande_honeycuttk2</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> An assistant administrator will likely not be needed for the first year. It is unclear what the specific roles of an assistant administrator would be with only 75 students. - gscherbeck</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> I see no staff for areas such as art, music, PE, etc. Will these be contracted or not offered? - marie_massengill</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> concerned about expectations of EC staff and salaries - aruckkagan</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> Potentially insufficient allocations for EC related services. Transportation insufficient. No marketing budget. No professional development budget. No line for technology. - cande_honeycuttk2</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> The following budget items should be addressed: Transportation - \$5,000 - This is a minimal amount to set aside for transportation. The school must dive into greater detail regarding a realistic transportation plan. Instructional Materials - \$50,000 - The school should provide more information to how the \$50,000 will be spent on instructional materials. Copy Paper - Not listed - No funds are set aside for copy paper. It is unclear how the basic functions of a school will operate without copy paper. Staff Development - Not listed - No funds are set aside for staff development. - gscherbeck</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> low cost for BC ABA consultant low custodial low payroll transportation costs low what is in instructional material costs? no computer costs/IT no marketing or PD - aruckkagan</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> The transportation costs are not realistic given the special student population. - kelleystacy</p> <p><u>Total Expenditure Projections (Table)</u></p>

	<p>The budget is deficient in too many areas to be addressed by the surplus. If a student required 1:1 instruction or the other costs would be addressed, this budget would have a serious deficit in year one. - cande_honeycuttk2</p> <p><u>Total Expenditure Projections (Table)</u> A \$20,000 surplus is very minimal and will likely be spent. Extreme detail should be provided regarding the financial stability of the school and if it's possible to open on such a limited budget. - gscherbeck</p> <p><u>Total Expenditure Projections (Table)</u> need more info about surplus ranges - aruckkagan</p> <p><u>Total Expenditure Projections (Table)</u> Please describe staff projections given the small student enrollment and how revenues will be supplemented to operationalize the proposed plan. - kellestracy</p> <p><u>Budget Narrative</u> The contingency plan is insufficient to meet the potential budget shortfall to meet program objectives.</p> <p>A line of credit is still money owed and could present significant problems should the school fail to meet enrollment or incur additional expenses outside of the projected budget. - cande_honeycuttk2</p> <p><u>Budget Narrative</u> More information should be requested the demand and legality of opening charter school that only admits students with autism. The application states that 1000 students in the county have autism but it's unclear if those students are properly being served or actively seeking another school.</p> <p>A financial contingency plan is listed but needs more detail. Fundraising and grant writing is mentioned however no clear plan or amount of funds are specified. Again, with only a \$20,000 surplus extreme caution should be used when evaluating the financial stability of the school. - gscherbeck</p>
<p>OVERALL</p>	<p><u>Grade Levels Served and Total Student Enrollment:</u> No evidence presented that the school would be able to fill enrollment. Grade levels proposed, targeted population, and school size pose issues with budgeting and appropriate licensure and provision of services. - cande_honeycuttk2</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> 15 students per grade level is incredibly small. It is unclear how the school can become financially stable with only 15 students per grade level or 75 students across 5 grade levels. - gscherbeck</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> unsure if projections are realistic - aruckkagan</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Projected enrollment figures are not realistic given (year 1-5) the staff necessary to operationalize the proposed school design in terms of staff to student ratio. - kellestracy</p>

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.
10/24/2014	The CSAB voted unanimously to deem this application complete on November 14, 2014.
Application Review	<p>On March 9, 2015 the CSAB subcommittee voted to deny this application to interview. The subcommittee vote was 4 to 2. The full CSAB vote was 9 to 2.</p> <p>Concerns outlined consisted of the following: If the school is stating that they will only serve Exceptional Children, what happens if a regular education student applies? Where did the applicant's EC number for autistic students come from? Mr. Walker asked the board member who is also an autism teacher, "What would your school provide that they could not receive in Guilford County schools"? Mrs. Taylor asked what options there were for students with Autism in the county? Mr. Hawkes said that he has heard that there is a need for these schools. Mr. Quigley stated that there is clearly a need for the school. Mr. Quigley stated that there was a lot of concerns in the application including the separate setting. Mr. Walker said he had a concern over the budget. What is the school contingency plan if only 60 students attend? Mrs. Taylor stated she had concerns about the written application. Mrs. Taylor made a motion to not invited the school in for an interview. Mrs. Turner seconded.</p>
Application Interview	
OVERALL	This application will not move forward to interview.