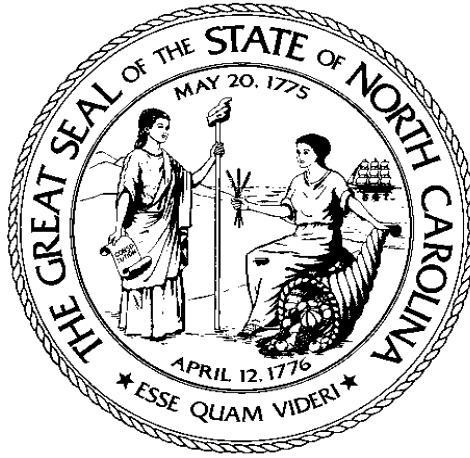


High Point Charter Academy - The mission of High Point Charter Academy (HPCA) is to provide character, leadership, and academic development to children and families who are academically, socially, and economically at-risk for academic failure.

Attribution: Board



### 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:

Deanna Townsend-Smith  
Nicole Charles  
Phyllis Gibbs  
Glenn Allen  
Kristen Parker  
Douglas Price  
Robert McOuat  
Becky Taylor  
Steven Walker  
Greg Schermbeck  
Brian Smith  
Tammi Sutton  
Sherry Reeves  
Anthony Helton

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Attribution: Board

**Date of Review:**

09/30/2016

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Attribution: Board



## **NORTH CAROLINA CHARTER SCHOOL APPLICATION**

# **High Point Charter Academy**

**Public charter schools opening the fall of 2018**

**Due by 5:00 pm, September 19, 2016**

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 2016 Application Process**

**To open a charter school in the 2018-2019 school year**

### **APPLICATION DUE DATE/TIME**

**September 19, 2016** 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 19, 2016 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.
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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Attribution: Board

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Attribution: Board

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## I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: High Point 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: *High Point Charter Academy, Inc.*

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

Name of contact person: *Shawana Torrence*

Title/Relationship to nonprofit: *Board Chair/Lead Applicant*

Mailing address: 4603 Mallard Creek Dr.  
Greensboro NC 27450

Primary telephone: 336-471-8130 Alternative telephone: 336-471-8130

E-Mail address: highpointcharter@gmail.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:

If so, provide the name of the third party person or group. National Heritage Academies, Inc.

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

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

This is our Board's fifth attempt to obtain a charter to serve the students

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Attribution: Board

and families of High Point who so desperately need more public school choice. In our most recent effort, we had the opportunity to interview with the Charter School Advisory Board (CSAB). We received a great deal of valuable feedback, including that our mission and vision was sound, and that there is a need for quality public charter schools in our community. However, aspects of our operational plan were concerning, and it was suggested by the CSAB that our Board consider professional management services in order to strengthen our proposal. After lengthy consideration and the necessary due diligence, our Board reached out to National Heritage Academies (NHA), a full-service educational management organization already operating schools in Guilford County.

NHA met with our Board multiple times to explain its model and services in more detail. We appropriately probed to ensure that NHA was the right fit for us - and our Board made some small operational changes to align with NHA's areas of expertise, while not compromising our Board's ultimate mission and goals. Our Board is made up of diverse and passionate members of the High Point community who know too well the need for better public schools. Our backgrounds in education, business and financial management, and non-profit oversight, coupled with NHA's experience building and operating public charter schools, will position us well to offer an excellent educational program to High Point families. Moreover, partnering with NHA and investing in the development of a new or renovated facility will help us establish the type of long-standing educational institution our community deserves. In addition, our Board has secured Carruthers and Roth, in Greensboro, as legal counsel to assist in our negotiations with NHA, our preparations for this application, and in the long-term governance oversight of our school.

We have worked closely with NHA to integrate aspects of its model, including the curriculum and educational plan, the staffing structure, professional development programs, and the financial plan, for example. Details including the curriculum and instructional design, the approach to educational programming for at-risk, English Language Learners (ELL), and exceptional children (EC), and student conduct and discipline expectations all are consistent with this model. Most other aspects of our application were adapted from our prior application efforts and modified by our Board and NHA to reflect our improved plans. Our mission and the rationale presented in this application remain unchanged. After discussion with NHA, we decided to change our school name to be more reflective of the community as a whole, and reference our plans to ensure our students are able to be leaders of tomorrow. Therefore, our new school name is High Point Charter Academy, and our new non-profit corporation and bylaws reflects this change, as well as others recommended by Board legal counsel.

NHA has also been clear with our Board that the organization is working with other applicants in this round, and there will likely be similarities between aspects of the proposals that describe the NHA model. Our Board understands this and feels that the consistency in approach is an attractive part of partnering with an organization like NHA. Regardless, our Board has drafted and/or reviewed all aspects of this application, and is comfortable with its content. We have been sure to attribute the work in each section to the appropriate parties.

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Attribution: Board

We will continue to work with NHA and our legal counsel throughout this proposal process. We look forward to the opportunity to present to the CSAB again to reaffirm our Board's commitment to our mission through our strengthened operational plans.

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

No:

Yes:

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

No:

Yes:

*If replication, please provide the name of the charter school and the state that charter school has been authorized to operate in.* Research Triangle Charter NC

*Do you want your application to be considered for Fast Track?*

Yes:

No:

*Are you a non-profit corporation board partnering to replicate an existing model operated by an EMO/CMO?*

Yes:

No:

### *Eligibility Criteria*

*A non-profit corporation board that currently operates a charter school in NC is eligible to apply to replicate it currently existing model only if the non-profit corporation board's current school or schools demonstrate a consistent track record of academic, financial, and operational success. If the board operates more than one school, each school must meet this standard. To meet this standard, the non-profit corporation board must meet each of the following conditions:*

*Each school operated by the non-profit corporation must have academic outcomes at least comparable to those of the students enrolled in the LEAs in which they are located. In addition, each school operated by the non-profit corporation must meet or exceed student growth consistent with State standards, for the three years immediately preceding the application, and maintain that growth throughout the application period.*

Yes:

No:

*\*Attach as Appendix A the educational outcomes for the replicated school for the last three academic years.*

*Each school operated by the non-profit corporation must have unqualified audits for the three years immediately preceding the application and must maintain that fiscal standard throughout the application period.*

Yes:

No:



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Attribution: Board

*Each school operated by the non-profit corporation must have resolved any noncompliance issues cited by NCDPI during the three years immediately preceding the application and must maintain this standard throughout the application period.*

Yes:

No:

*A majority of the non-profit corporation board members and 50% or greater of the board officers must be North Carolina residents.*

Yes:

No:

### *Eligibility Criteria*

*A non-profit corporation board that does not currently operate a charter school in NC is eligible to apply to replicate through fast-track replication an existing model operated by an EMO/CMO. The non-profit corporation board is eligible to apply only if the schools operated by the EMO/CMO have a consistent track record of academic, financial, and operational success. The non-profit corporation is eligible to replicate an existing model operated by the EMO/CMO only if the non-profit corporation board meets each of the following conditions:*

*The non-profit corporation board must demonstrate that each of the schools being managed by the EMO/CMO in North Carolina (1) have an academic proficiency comparable to the LEAs in which the current schools are located; or (2) meet or exceed growth for the three years immediately preceding the application at issue. If the EMO/CMO does not manage any schools in NC or the schools it manages in NC*

*do not yet have the data listed above, the non-profit corporation board must demonstrate to the SBE that the schools operated in other states by the EMO/CMO meet similarly rigorous standards for academic performance. The EMO/CMO must continue to meet these standards throughout the application period.*

Yes:

No:

*\*Attach as Appendix A the educational outcomes for the replicated school for the last three academic years.*

*The non-profit corporation board must demonstrate that each of the schools in North Carolina managed by the EMO/CMO have unqualified audits without fiscal compliance issues for three years immediately preceding the application. If the EMO/CMO does not currently manage any schools in NC or the schools it manages in NC do not yet have the data listed above, the non-profit corporation board must demonstrate to the SBE that the schools operated in other states by the EMO/CMO meet similarly rigorous standards for financial performance. The non-profit corporation board must maintain this standard through the application period.*

Yes:

No:

*A majority of the non-profit corporation board members and 50% or greater of the board officers must be North Carolina residents.*

Yes:

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Attribution: Board

No:

*Acceleration*

Yes:

No:

*To be considered for acceleration applicants must meet four specific criteria. Provide supporting evidences of the following:*

*\*Demonstrate a clear and compelling need for the accelerated planning year*

*Partner with a two of four year institution of higher education in North Carolina*

*Attach Appendix A from the four year institution of higher education in NC to demonstrate a partnership  
Verify the absence of a charter school in the proposed county of location*

Yes:

No:

*Agree to participate in the planning year while the charter application is being reviewed without any guarantee of charter award.*

Yes:

No:

*What is the name of the nonprofit organization that governs this charter school? High Point Charter Academy, Inc.*

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

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

*Projected School Opening: Year 2018 Month August*

*Will this school operate on a year round schedule?*

No:

Yes:

*Proposed Grade Levels Served and Total Student Enrollment (5*

*Years)*

<b>Academic School Year</b>	<b>Grade Levels</b>	<b>Total Projected Student Enrollment</b>
First Year	K,01,02,03,04,05	520
Second Year	K,01,02,03,04,05,06	604
Third Year	K,01,02,03,04,05,06,07	688
Fourth Year	K,01,02,03,04,05,06,07,08	772
Fifth Year	K,01,02,03,04,05,06,07,08	772

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Attribution: Board

*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.*

storrence18

*Signature*

storrence18

*Printed Name*

Board Chair, Shawana Torrence

*Title*

09/15/2016

*Date*

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Attribution: Board

<b>Section I: Application Contact Information Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
<u>The relationship with NHA should be fully explained. Given that NHA is a for-profit management organization, great detail should be paid to their financial and academic motives.</u>	<u>Greg Schermbeck</u>	<u>Cover Page</u>
<u>Several evaluators are questioning why the board is doubling the size of the school in this application as compared to last year's application. With the assistance of NHA High Point Charter Academy will likely meet anticipated enrollment numbers.</u>	<u>Sherry Reeves</u>	<u>Cover Page</u>
<u>If High Point Charter Academy Inc. is the non-profit, will the 501(c)3 be obtained prior to opening?</u>	<u>Nicole Charles</u>	<u>Cover Page</u>
<u>Why was the decision made to add the fifth grade and double the projected enrollment from last year? Is the need in the area higher since last year?</u>	<u>Brian Smith</u>	<u>Grade Levels</u>
<u>Total projected enrollment of 500+ students in an opening year is high. These figures are not tactical and realistic in the proposed region.</u>	<u>Greg Schermbeck</u>	<u>Grade Levels</u>
<u>Although the enrollment figures are tactical with grades growing each year, are they overly ambitious given the proposed population? High need population need careful and deliberate service delivery, is this accounted for in the enrollment data?</u>	<u>Nicole Charles</u>	<u>Grade Levels</u>
<u>Applicant Needs to Clarify: 1. The total enrollment has doubled in this application compared to last year? Last year total enrollment through the 5th year was 320, this application states a total enrollment of 720 in the fifth year. Why was this decision made?</u>	<u>Kristen Parker</u>	<u>Grade Levels</u>

<b>Reviewer</b>	<b>Score</b>
<u>Deanna Townsend-Smith</u>	
<u>Nicole Charles</u>	<u>Pass</u>
<u>Phyllis Gibbs</u>	
<u>Glenn Allen</u>	
<u>Kristen Parker</u>	<u>Pass</u>
<u>Douglas Price</u>	<u>Pass</u>
<u>Robert McQuat</u>	
<u>Becky Taylor</u>	
<u>Steven Walker</u>	<u>Pass</u>
<u>Greg Schermbeck</u>	<u>Fail</u>
<u>Brian Smith</u>	<u>Pass</u>
<u>Tammi Sutton</u>	
<u>Sherry Reeves</u>	<u>Pass</u>
<u>Anthony Helton</u>	<u>Pass</u>

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Attribution: Board

## **II. MISSION and PURPOSES**

(No more than three total pages in this section)

### **Mission:**

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

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

The mission of High Point Charter Academy (HPCA) is to provide character, leadership, and academic development to children and families who are academically, socially, and economically at-risk for academic failure.

Attribution: Board

*Clearly describe the mission of the proposed charter school:*

Students at HPCA will develop the knowledge and skills for success in and outside of the classroom. Providing high-quality public school choices to children and families in and around the Brentwood neighborhood of High Point must happen, and happen now. Our program will equip students with the character, leadership, and academic knowledge needed to excel in high school, college, and careers.

Attribution: Board

### **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.*

HPCA will start as a K-5 school and grow to K-8 by our fourth year of operation. We sought out National Heritage Academies (NHA) as our management partner for the school through the suggestion of the CSAB. NHA is a full-service education management organization that operates 83 partner schools in nine states, including 10 here in North Carolina. Although an exact location for our school has not been identified, we intend to locate in the city of High Point.

Target Student Population: We will not target a specific population for enrollment. The City of High Point is located in Guilford County and is adjacent to three other counties: Randolph County, Davidson County, and Forsyth County. We will likely draw the majority of students, 80%, from the southwestern portion of Guilford County Schools (GCS) and the remaining 20% from Randolph and Davidson counties. We will market broadly to Guilford County. Our school will likely reflect demographic and socioeconomic

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Attribution: Board

composition to that of GCS in our area. Student ethnicity in GCS is: 34% White; 41% Black; 14% Hispanic; 6% Asian; 4% multiracial; and 1% other. We expect over three-quarters of our students (85%) to participate in the free and reduced-priced lunch (FRL) program, 10% to be EC students, and 12% to be ELL.

Rationale for Location: Historically, High Point was known for its furniture manufacturing, and like other U.S. cities, many of these companies have outsourced their labor, leaving individuals unemployed and uneducated. Hunger in High Point, NC is considered among the worst in America (<http://wfdd.org/post/study-hunger-greensboro-high-point-worst-nation>). In fact, five of the seven Food Deserts in High Point are adjacent to the Brentwood Community, which is in our target real estate search area, and compose the proposed population for HPCA. Many of the children in this area are marked by extreme poverty and are part of families who have been in a cycle of poverty. Children that are stuck in the cycle of hunger, poverty, and low-educational attainment are at-risk for learning gaps. These children face uncertain futures and there are limited options for parents who desire to access quality education to help place their children on a path to a better life. HPCA, if approved, will provide a choice for these families. There are only nine charters in Guilford County, and none near the High Point City Center. There is a need for additional public choice in our community. We conducted a 2016 survey of area parents and 34% of parents stated that they would be likely or highly likely to send their children to a charter school like the one we are proposing.

In Appendix A1, we provide a glimpse of corresponding social problems and indicators of the distress including: higher percentages of renters; individuals and families below the poverty level; and family educational underachievement in the Brentwood community. These visible signs are reminders of the need for an infusion of resources and the deployment and/or re-deployment of an outstanding educational facility. Because they must provide for themselves and their children on limited incomes, low-income parents/guardians need programs to increase their opportunities for reducing cycles of poverty and negative behaviors and provide a foundation for career and college success.

Through our partnership with NHA, HPCA will meet the need for an educational facility to revitalize and empower our community.

Attribution: Board and NHA

- 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).*

HPCA will serve students in kindergarten through eighth grade. Following the NHA-partner school structure, we plan to open in 2018-19 serving 520 students in grades K-5, and will grow each of the next three years to serve approximately 772 students in grades K-8 by 2021-22. Our partnership with NHA allows us to have a fully-staffed administrative team in place from day one, as well as a completed facility that will accommodate our full K-8 program even though we are starting out serving fewer grades and students.

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Attribution: Board

This approach will allow our school to better focus on having the right programs and procedures in place from the start, and more easily allows our school to adapt and incorporate any needed changes in its early operating years as it grows to full capacity.

We expect that 80% of our students will come from families living within the GCS LEA, 10% will come from Randolph County Schools (RCS), and 10% from Davidson County Schools (DCS). We have built our budget and expected student population profile on this assumption, but of course will adjust our calculations if necessary as we actually enroll students.

In 2015-16, GCS enrolled 47,658 K-8 students. Eighty percent of our projected full enrollment of 772 at HPCA represents less than two percent (1.3%) of the LEA's comparable student enrollment. Eighty percent of our initial first-year enrollment of 520 represents less than one percent (0.8%) of GCS's total K-8 enrollment.

In 2015-16, the RCS LEA enrolled 11,959 K-8 students. Ten percent of our projected full enrollment of 772 at HPCA represents about one-half of one percent (0.6%) of the LEA's comparable student enrollment. Ten percent of our initial first-year enrollment of 520 represents less than one-half percent (0.4%) of the RCA's LEA's total K-8 enrollment.

In 2015-16, the DCS LEA enrolled 12,977 K-8 students. Ten percent of our projected full enrollment of 772 at HPCA represents about 0.6% of the LEA's comparable student enrollment. Ten percent of our initial first-year enrollment of 520 represents 0.4% of the DCS's LEA's total K-8 enrollment.

Attribution: Board and NHA

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

GCS student assessment results shows that the proficiency for black students in 2014 was the lowest of any subgroup and below the district average (37.3% compared to 53.2%).

HPCA will provide a high-quality academic program that closes achievement gaps. We know that our students will likely come with significant academic, emotional, and social needs, and have designed our school to meet these needs. We plan to implement four pillars that are key design elements for all schools partnering with NHA: academic excellence, student responsibility, moral focus, and parental partnerships. We embrace NHA's approach and its appropriate emphasis on these institutional values will help HPCA create and sustain a strong and positive school culture.

Academic Excellence: Students can build a record of success in high school, college, and beyond only on the foundation made possible by a high-quality K-8 education. Achievement may be defined differently for each student, but the goal will not vary from one student to another: to strive to prepare every student for college and career success.

Distributed Leadership: The NHA-partner school model features distributed leadership, where academic deans are responsible for a team of grade-level

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Attribution: Board

staff (e.g., K-2; 3-5; 6-8), and serve as direct managers of teachers. A dean of intervention will serve our at-risk students. This structure allows deans to coach teachers weekly on how to increase effectiveness. The principal and deans will constitute our school leadership team.

Moral Focus: We believe that a great school should aim to develop students' hearts as well as their minds. As Dr. Martin Luther King, Jr. stated, "The function of education is to teach one to think intensively and to think critically. Intelligence plus character - that is the goal of true education." Our moral focus curriculum will build on universally recognized virtues that build leadership such as perseverance, courage, compassion, and integrity. Through lessons that seek specifically to instill these virtues, students will build and maintain a strong moral character and develop the qualities necessary to achieve academic success and become good citizens.

Parental Partnerships: Our Board and NHA believe that parents understand the important role they play in ensuring their child's academic success and value being treated as partners. HPCA is committed to fostering strong partnerships with students' families which, in turn, will help children achieve more personal and academic success.

Our key design elements will also come to life through NHA's organizational framework, outlined below.

School-Wide Framework: The HPCA principal will be charged with faithfully and consistently implementing these values to drive the successful pursuit of above-average academic results. There are five specific elements to the school-wide framework at HPCA:

- Establish a professional culture of excellence: The principal will lead a community that is motivated to achieve high expectations and that exhibits high care for all members of the community.
- Systematize collaborative improvement: Deans, teachers, other instructional professionals, and all staff will work in collaborative, data-driven teams, seeking improved student learning through the shared study and implementation of instructional best practice.
- Lead instructional excellence: Deans will have instructional coaching as the top priority, to ensure high-quality learning for every student in every classroom every day.
- Implement systematic intervention: HPCA will identify students who are academically at-risk, ELL, or behaviorally challenged. We will provide them the necessary services and monitor progress systematically.
- Cultivate meaningful parent partnerships: Parents and school staff will authentically connect to understand and support each other in a caring and meaningful way, working in partnership to help every child achieve college readiness.

Attribution: Board and NHA

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*



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*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.*

HPCA's mission statement is the driving force behind our school, and the NHA-partner school model will embody this vision and fulfill North Carolina's legislative purposes for charter schools.

1. Professional Opportunities for Teachers. NHA will provide new professional development opportunities for teachers, including opportunities to be responsible for the learning program at the school site. Our intent is to hire teachers and staff with skills and knowledge that will make technology integration a vital component of student success. We recognize that we can help students learn by helping teachers grow. Because of our school design, a career path exists where stellar teachers can become teacher leaders, mentors, and then supervisory deans who oversee and coach teams of grade-level teachers. Outstanding deans also are developed to become principals if they choose. NHA also conducts a "School Leadership Academy" that provides ongoing support to new and potential principals throughout the year. The "Staff Evaluation and Professional Development" section of this application offers more detail on these opportunities.

2. Accountability for Results. Just as we intend to hold students accountable for what they learn, at HPCA we will hold teachers, school leaders - and ourselves as the Board - accountable for the results at our school. We will administer all required state assessments and will embrace North Carolina's READY Accountability Model. Additionally, our school will institute a comprehensive formative assessment program that evaluates individual, class-wide, and school-wide student academic performance. Evaluations at the beginning of each year will provide a baseline, and subsequent evaluations will gather important and detailed data that will be used to drive and revise instructional practices and measure annual growth. Accountability for performance also will extend to other areas of the school's operations, such as attendance rates, fiscal stability, and parental satisfaction. Each year, we will create an annual school improvement plan that examines performance data for all aspects of our

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school and presents a plan of action for the following school year. Our goal is to offer area families a public school choice that is not just different, but better.

3. Expanded School Choice. A recent survey of families in our area showed that only 16% felt the district was providing a "great" education, well more than half (58%) said they wanted to be contacted if our proposed charter school was approved to open in the High Point area, and 34% said they would be "very likely" or "likely" to send their child to school such as ours. HPCA will offer parents and students in our community the public school choice they desire and need. In addition to offering public school choice, we understand that it is imperative for parents to work with us to ensure their children's success. Parents of each child will be encouraged to volunteer, invited to participate in monthly workshops about parental involvement, study habits, homework, and academic activities.

4. Improving Student Learning. We will hold NHA accountable to improve student learning at our school. At NHA-partner schools, student achievement is excelling:

- Four of NHA's seven NC partner schools operating in the 2014-15 school year ranked in the top 12 of all charter schools for EVAAS growth (see: <http://www.ncpublicschools.org/accountability/reporting/>).

- 96% of students completing eighth grade at NHA-partner schools go on to graduate from high school, easily surpassing the national average for low-income students (70%) and all students combined (80%). Additionally, 37% earn a bachelor's degree or higher. That graduation rate is nearly five times higher than the national average for low-income students (eight percent), and it exceeds the rate for all students (31%) combined (NCES, 2013).

\*See overflow section for more information.

\*Continued from "Purposes of Proposed Charter School."

- Nearly 80% of NHA-partner schools outperformed their local school district on state testing according to the most recent data available (2014-15).

5. Increased Learning Opportunities for Students. A fundamental purpose of charter schools is to seek new approaches to effective teaching and learning. As such, we will embrace innovation and change to enhance our ability to meet the needs of our students. HPCA will create a learning environment supported by fundamental principles of excellence focused on college and career readiness (see description of the differences of our school model with that of district schools, above). We are committed to meeting the needs of students who are at-risk academically and will ensure that these students are addressed systematically. HPCA will have a robust formative assessment program to help quickly identify students who need extra attention, as well as those who are surpassing grade-level standards. All of our students deserve personalized instruction, and our school model is designed with such adaptability in mind.

6. Innovative Teaching Methods. HPCA's hands-on oversight and coaching of teachers and purposeful professional development is a design that not only

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supports instructors in the classroom but also prepares them for expanded responsibility and future leadership positions. Weekly coaching, along with peer-group planning time and a structured professional learning community design, is designed to quickly replicate and institute best practices and allow brainstorming for creative approaches to the challenges teachers face.

The legislative purposes for charter schools will be fulfilled by HPCA's structure and programs. The four foundational pillars of our educational model help illustrate this:

**Academic Excellence:** A high-quality K-8 education sets the critical foundation for a student's success in high school, college, and beyond. Achievement may look different for each individual, but our goal is to prepare every student for college. With that in mind, the curriculum is designed to meet relevant state learning standards and ensure that students master the specific skills and knowledge in each content area at each grade level.

**Moral Focus:** A great school should aim to develop students' hearts as well as their minds. Our moral focus curriculum builds on monthly virtues of wisdom, courage, compassion, gratitude, respect, encouragement, integrity, self-control, and perseverance. HPCA students will build and maintain strong personal character while also developing the qualities necessary to achieve academic success and become good citizens.

**Parental Partnerships:** HPCA is committed to fostering strong partnerships with parents. HPCA intends to empower parents/guardians to become advocates for themselves and their children through a parent organization designed to help their children succeed, which is described in greater detail later in this application and in Appendix A1. Our school will actively engage parents in their children's learning and consistently communicate with parents. Included in this effort will be a dedicated parent room specifically to allow ongoing interaction between parents and teachers.

**Student Responsibility:** Children thrive in an environment where they clearly understand what is expected of them, and after putting forth their best effort, they take pride in seeing the results. Students will be taught that their best effort is vital to academic success, and teachers will reinforce consistently the importance of students' accountability for their education and actions.

Attribution: NHA

### **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.*

While aware that we are likely to enroll a student population disproportionately in need of intensive and ongoing academic intervention, HPCA still will hold itself to a high standard regarding student academic

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Attribution: Board

performance. The school will establish meaningful student performance goals that allow comparison to area district schools and to state performance standards.

Goals: Our Board will monitor student academic performance goals closely, using measures of academic growth and proficiency beyond those required by state law, and will hold staff and NHA accountable for reaching those goals. Academic goals for the first five years include:

- Early Literacy: In both kindergarten and first grade, students will score at or above the 65th percentile in reading and math as measured by beginning-of-year to end of-year learning growth on a nationally-normed standardized assessment.

- Comparative Success: By the third year, students at HPCA will exceed the average performance of comparable local district schools on state assessments

- Postsecondary Readiness: Eighth-grade students in at least their third year at HPCA will successfully complete Math I and as a cohort will earn at least a 75% passing rate on the end-of-course exam.

- State Accountability: Over the course of our charter term, our school will average a "Meets Expectations" growth designation on the state assessment. We will strive to "Exceed Expectations."

- Our school leaders will monitor and evaluate staff using the classroom framework rubric.

We also will administer a national assessment of college readiness to every eighth-grade student and will use the results to develop a plan for each student's success in high school and college. As noted in the "Purposes" section above, NHA-partner schools have a track record of success ensuring that students are high school-ready and college-ready.

Our goals are minimum standards, we will always seek to do better.

We will establish operational goals, too:

- Student Attendance: Each year, HPCA will average a student attendance rate at or above 93%.

- Parent Engagement: Each year, HPCA will have an overall parent satisfaction rate of 80%, with at least 50% of parents responding to our survey.

- Performance of Management Partner: Each year, our Board of Directors will review the performance of, and provide feedback to, our education management partner. The review will be used to identify our management partner's successes and opportunities to improve its future performance. Accountability goals expected to be put upon our management partner include: a 100% compliance record in reporting and other regulatory areas; and, the development of an annual comprehensive school improvement assessment and

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Attribution: Board  
plan of action.

- Audit: Each year, HPCA will receive an unqualified audit.

Communication to Board: Our Board will receive status reports on progress toward these goals at each monthly meeting. Throughout the course of each school year, our Board will be provided data that answer critical questions, such as:

- Are students meeting expectations and are they proficient and growing academically?
- How are special student subgroups performing?
- Are our 8th-grade students' college-ready?
- Are parents satisfied?

Parents and students, too, will be informed of the school's progress toward its goals through periodic informational newsletters and special bulletins. Of course, individual student performance will be communicated through regular report cards and during scheduled parent-teacher conferences, at a minimum.

Attribution: Board and NHA

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

The expectations for reaching the HPCA mission are based upon solid research about successful "best practices" with similar target populations. For example, Dr. Fryer, of Harvard's Education Innovations Laboratories (EdLabs), studied 35 charter schools in New York and discovered the top five practices that separate low- and high-achieving charter schools are: (1) extended time at school, (2) strong administrators and teachers, (3) data-driven instruction, (4) small-group tutoring, and (5) a culture of high expectations. This is part of the reason we partnered with NHA. Their educational model has all of these components.

Our school will be one where Board members, teachers, administrators, students, parents, and NHA use information to measure success. As a Board, we are focused on ensuring that our membership includes experience in K-12 education, public service, business, marketing, financial planning, and management so that we are able to effectively plan for and oversee progress toward achieving our mission. Further, our work throughout the community, on boards of other organizations, and as educational leaders will provide keen access to community leaders who will help ensure our school starts well and remains a last and valuable asset for the community.

We will require monthly reports to monitor progress in achieving our mission and charter goals. These reports, provided by school leadership and NHA, will detail benchmarks met, document trends toward the achievement of overarching goals, and discuss potential challenges in meeting each performance objective and how to address them.

These reports also will include operational information pertinent to student performance, such as student count numbers, attrition percentages, student

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Attribution: Board

attendance, student discipline, percent of students below grade-level, percent of exceptional children, and more. School leaders, in conjunction with NHA as appropriate, will provide us with the information needed to assess all aspects of the school's performance, including:

- Absolute and comparative student performance on internal diagnostic and interim assessments.
- Growth in student learning.
- Current status under state and federal accountability systems.
- College readiness status.
- Vital statistics on our student population, including demographics, enrollment count, free or reduced-priced lunch count, and exceptional children count, as well as the corresponding achievement levels of these subgroups.
- Parent satisfaction and other stakeholder information.

School leaders and our Board will discuss: school culture; the delivery and results of staff professional development; student attendance and enrollment trends; programs of parental and community involvement; results of various elements of the school's internal formative assessment program; staff performance recognition programs; and, employee and staff grievances or concerns. Our Board will be continually apprised on how the school is operating, how staff is delivering the educational program, and how students are performing. There should never be a situation in which testing results come as a surprise to school leadership or the Board. If the school is lacking in any area, our Board and NHA are committed to addressing the area of need. We may also contract for regular reviews of NHA's performance to ensure that we are meeting all performance requirements in our charter and we are satisfied with NHA's commitment to our school.

We will take advantage of the online and in-person training opportunities offered through the North Carolina Department of Public Instruction's Office of Charter Schools, which offers more than 15 hours of training to board members on charter school governance. Additional training opportunities will be pursued through organizations such as the North Carolina Public Charter Schools Association.

Attribution: Board and NHA

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Attribution: Board

<b>Section II: Mission and Purposes Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
How will the non-academic aspects in the mission be actualized in the curriculum?	Nicole Charles	Mission Stat
Mission statement wording is somewhat redundant (academic development...academically...at-risk for academic failure).	Sherry Reeves	Mission Stat
Does the targeted population align with the mission of the school?	Brian Smith	Mission Stat
It is concerning that this school is not targeting a specific student population. This also doesn't align with the mission statement of focusing on "at-risk" students.	Greg Schermbeck	Mission Stat
Attached for review purposes is a map outlining the current charter schools. Additionally, the map provides an overview of the general placement of proposed charter schools for the 2018 school year: <a href="http://www.dpi.state.nc.us/charterschools/schools/map">http://www.dpi.state.nc.us/charterschools/schools/map</a> .	Deanna Townsend-Smith	Educational
Statement about no target population seems to conflict with stated mission. School mission specifically states that at-risk students will be targeted but statement from applicant regarding targeted population is that there is no target population.	Sherry Reeves	Educational
The application states that a specific student population will not be targeted. The evidence of educational need is attached and provides some data points for the proposed region however many of the links included are not entirely applicable. Also, the 34% of parents who cited interest in a charter school does not appear to be a significant figure. The applicant does not fully explain how its education plan will be drastically different or better than other school options.	Greg Schermbeck	Educational
Although the need for better educational options was clearly explained, does the education plan appear too similar to any LEA without much innovation to address the challenges outlines?	Nicole Charles	Educational
I garner concerns on Legislative Purpose #6: this answer seems vague, at best; it does not fully outline any true innovative approaches to teaching methods, and outlines only how administration and coaching plays a big role in this setting.	Douglas Price	Purposes of
What metrics will be used to measure success beyond state standards?	Nicole Charles	Purposes of
Previous accomplishments are cited however the applicant does not clearly describe how the proposed charter school will achieve one more legislative purposes. Identified purposes do not provide clear metrics or expected outcomes for students and staff.	Greg Schermbeck	Purposes of
Are monthly reports as detailed as proposed an attainable goal?	Nicole Charles	Goals for th
Performance goals are mentioned however a clear and specific process to measure those goals are not included. Further, the stated goals are not reflective of high student and staff expectations. Many simply seek to meet state expectations. Lastly, goals should never be "minimum standards".	Greg Schermbeck	Goals for th

<b>Reviewer</b>	<b>Score</b>
Glenn Allen	
Becky Taylor	
Anthony Helton	Pass
Steven Walker	Pass
Kristen Parker	Pass
Greg Schermbeck	Fail
Deanna Townsend-Smith	
Brian Smith	Pass
Douglas Price	Pass

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Tammi Sutton	
Nicole Charles	Pass
Sherry Reeves	Pass
Robert McQuat	
Phyllis Gibbs	



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Attribution: Board

### **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.

Our instructional program is built on four foundational pillars: academic excellence, student responsibility, moral focus, and parental partnerships.

**Instructional Methods:** Teachers will use various instructional methods to promote engagement, describe instructional intent explicitly, and implement appropriate rigor. Focused lessons will include direct instruction, modeling, demonstration, development of metacognitive awareness, and teacher think-alouds, among other methods, and they will be conducted in whole-group or small-group settings as student needs dictate. Guided instruction may be done with large groups or small needs-based groups during workshop time or during content-area learning blocks to allow for differentiation of instruction. At times, collaborative learning will be used to provide opportunities for students to learn from peers, to discuss or debate ideas and information, or to participate in collaborative, inquiry-based learning of curricular content. Finally, students will be assigned independent work to practice applying skills or knowledge that has been previously learned; to extend individual learning through the application of knowledge and skills to novel situations; or, to promote the development of higher-order thinking skills.

Teaching will include effective, research-based instructional strategies embedded within lesson plans and implemented during instruction. Strategies that have high probabilities of effectiveness, such as those identified by researchers at Mid-continent Research for Education and Learning (Marzano, Pickering, and Pollock, 2001), will be used by teachers in accordance with student need. Because effective learning requires that teachers shift the cognitive load to students, teachers will develop students' knowledge, understanding, and skill incrementally through appropriately sequenced lessons and units of instruction.

**Assessment Strategies:** HPCA will administer all state-required assessments and other required measurements of academic progress and proficiency. We also will have a formative assessment process embedded into our instructional approach. Included in our school's formative assessment process will be the administration of a nationally normed exam. This approach will provide measures of student learning from a full baseline, allow comparisons with other NHA-partner schools, measure individual student progress over time, and provide us with a national peer-group comparison

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point. We also will administer a college-readiness assessment to all eighth grade students. We will use those results with students in a manner that empowers students to go on to a challenging college-preparatory high school.

**Systematic Intervention:** At-risk programming will include additional teachers and assistants, staff dedicated solely to interventions, plans for extended learning time, and increased focus for targeted student subgroups. This will include some or all of the following: a dean of intervention to coordinate our systematic intervention strategy; full-time teachers and part-time tutors to provide interventions; an after-school blended-learning program and onsite summer learning; and biweekly progress monitoring to ensure that goals are being met. Implementing an educational program that meets the needs of all students is a core component of our mission.

These instructional methods and assessment strategies have worked: students entering NHA-partner schools below grade-level proficiency grow nearly 20% more than the average annually to close achievement gaps. NHA-partner schools also outperform their local school district three-fourths of the time, posting even higher rates at partner schools in urban areas (see Appendix O).

Attribution: NHA

### **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.*

We expect HPCA will open with a large percentage of students already at-risk of academic failure. Students with these challenges require a comprehensive approach to intervention from day one, and our systematic intervention program is designed to stimulate early action that helps prevent academic failure and maximize the effectiveness of grade level instruction. The systematic intervention structure will include more at-risk instructional programming, additional staff dedicated solely to interventions (including additional teachers, tutors, and an academic intervention coach), plans for extended learning time, increased learning intensity in specific areas to targeted student subgroups, and more frequent progress monitoring.

**Learning Environment and Structure:** Each classroom will be primarily structured as a direct-instruction model. Teachers will be effectively trained and frequently coached to employ a variety of instructional approaches (including modeling, think-alouds, etc.), and to use differentiated instruction as appropriate. Small-group settings will be created when they best benefit the delivery of the lesson at hand. Teachers will establish opportunities for collaborative and inquiry-based learning to deepen students' understanding of topics. Independent work will be assigned as practice in applying previously learned concepts and to promote the development of higher-order thinking skills.

Our age-appropriate curriculum and instructional design has been specifically designed by NHA to meet the needs of students in kindergarten

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through the eighth grade. NHA operates exclusively K-8 schools and has honed its program to serve the diverse needs of all students in those specific grade levels.

We will structure our instruction through intentional planning. Instruction at the school will be driven by a collaborative planning approach that includes the implementation of a formative assessment program, which will offer frequent and varying measures of progress to help determine the best approaches to teaching and learning. Planning will be characterized by three sequential but interrelated steps: year-long planning, unit planning, and daily planning.

**Year-long Planning:** Year-long planning organizes the grade-level curriculum into a long-range framework. Teachers' year-long plans will ensure that students have the time and opportunity to learn what is necessary to meet all grade-level standards.

**Unit Planning:** Unit-level planning stems from the year-long planning process, and will result in specific units of instruction that are based on the scope and sequence of the educational objectives outlined in the year-long plan. Unit planning aligns with the implementation of the school's formative assessment process. Adjustments to instruction are made based on this student-elicited evidence. Students also use the assessment results to track their learning and measure growth toward their academic goals using graphing or another form of record keeping.

**Daily Planning:** Once unit-level plans are developed, daily instructional planning will allow teachers to connect standards with specific instructional resources, effective teaching strategies, and the instructional methods that best support students' daily learning.

**Class Size:** We will have four kindergarten classes with 25 students on average in each class. In grades one to five, we will have three classes per grade level with an average of 28 students per class.

**Structure:** Classroom teachers will receive support from deans and work in grade-level teams to meet student needs and plan effectively. Our academic intervention coach will support teachers and intervention staff to ensure students receive additional support and that academic achievement improves. Teachers will also meet in vertical teams to ensure that students are learning the needed skills at each grade level.

Attribution: Board and NHA

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*

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Attribution: Board

*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.*

Our curriculum has been carefully aligned to the North Carolina state standards and Accountability Model. NHA is ready to make any needed modifications for any newly implemented systems.

Alignment to Mission: The curriculum focuses on personalized instruction designed to prepare all students for lifelong success in and out of school, a key outcome of achieving our mission. Our strong moral focus curriculum aligns with our mission to provide "character, leadership to children and families who are academically, socially, and economically at-risk."

Alignment to Student Population: HPCA will be our community's first charter school prepared from the outset to serve at-risk students. Additional staff will be dedicated solely to interventions, plans for extended learning time, and increased focus of instruction for student subgroups to help ensure school standards. Our assessment program will ensure that the curriculum and instructional approaches work for our students. We will continually review and adjust as necessary for student success.

Alignment to Accountability Model: We will use our instructional framework to ensure that curriculum and instructional approaches are producing academic gains for our students and that achievement is on track to exceed the measures in the state's Accountability Model.

1. Identifying Objectives and Determining Assessments: Teachers will collaborate to identify objectives for units of instruction based on the year-long plan, and use end-of-unit instruction assessments to gauge student learning. Rigorous assessments will gauge student mastery. Staff will also use periodic interim assessments, mock state assessments, and short-cycle assessments. Adjustments to instruction will be made based on assessment evidence.

2. Analyzing Evidence: Building-block assessments and end-of-instruction assessments will allow teachers to analyze evidence at the student and classroom level. The specificity of the building-block assessments enables teachers to determine exactly what knowledge or skills need further development for each student. As teachers meet to examine student work, they will gauge the effectiveness of their instruction and determine students' mastery of objectives. Evidence will be analyzed to discover student misconceptions and identify knowledge or skill gaps that may inhibit successful student learning.

3. Responding to Evidence: As units are prepared, teachers will identify opportunities for planned instructional adjustments prompted by building-block or end-of-instruction assessments. If learning progresses more quickly than expected, instruction will accelerate through the unit plan. The inverse will apply if learning progresses slower than expected. Teachers will consider end-of-instruction assessment evidence to develop subsequent units of instruction.

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Attribution: Board

Planned Components: Our school will benefit from the NHA curriculum, which exceeds North Carolina requirements. The following curricular tools will be used:

- Math K-5: Math Expressions
- ELA K-5: Reading Street
- Math 6-8: Big Ideas
- Math 6-8: Holt McDougal Literature
- NHA is analyzing several primary science curricular tools, prioritizing alignment to the state's essential standards for science. The top tools under consideration are Interactive Science by Pearson (K-8), ScienceFusion by Houghton Mifflin Harcourt (K-8), and Inspire Science (K-5) / iScience (6-8) by McGraw Hill.
- Social Studies: The primary tools expected include: Scott Foresman's Social Studies series (K-4); TCI's Social Studies Alive! (Grade 5); Journey Across Time (Grades 6-7); and, The American Journey: Early Years (Grade 8).
- Other: Google Chromebooks Intervention and accelerate materials will be available for use with Google Chromebooks, including i-Ready software for reading and math.

Attribution: Board and NHA

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.*

Mastery of Instructional Strategies: As noted previously, our teachers will be prepared and expected to use a variety of instructional methods representing the most effective learning strategies for each individual student. Our primary methods will include direct instruction, modeling, demonstration, think-alouds, and more. Personalized instruction may be done with large groups or with small, needs-based groups during workshop time or during content-area learning blocks to allow for differentiation of instruction (see "Instructional Program," above). A blended learning approach will also be used during workshop to meet the individual learning needs of students at all levels.

As part of the school's overall effort to manage instruction, the school's deans will work individually with teachers to ensure that appropriate teaching techniques are used to enhance student learning and promote high expectations. Teachers will receive training through focused professional development. They will receive support through weekly observations and subsequent coaching and feedback sessions to ensure that they successfully implement teaching techniques that have been shown to promote student learning.

Teachers also are expected to help students embrace the school's instructional efforts by initiating strategies that help students to take responsibility for their learning. This may include the use of learning goals as an instructional tool and helping students set individualized goals for themselves. This approach provides both students and teachers with a clear understanding of the desired focus skill, and allows teachers to articulate what they are teaching while allowing students to describe what they are learning and work at the appropriate level of difficulty (Marzano, 2009).

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Attribution: Board

In addition to scheduled school-wide professional development sessions, teachers will be observed frequently and provided feedback weekly and timely coaching. This time will also be used to brainstorm strategies for unique challenges and offer modeling from especially effective techniques to other teachers.

This combination of effective research-based instructional strategies, attention and adaptation to individual student needs, and meaningful and student-centered professional development closely aligns our instructional approach with our mission and will result in academic success for the students we will serve.

Systematic Intervention: Adopting our systematic intervention model will meet the needs of what we expect to be a large number of at-risk students, our additional interventionists will receive supplemental training on at-risk instructional strategies, including methods for small-group instruction and individualization of content.

Increased Academic Achievement: These instructional strategies will provide a comprehensive approach to delivering educational content and the flexibility to adapt instructional approaches to meet student needs. Combined with the use of formative assessment to provide multiple measures of individual student performance levels, this flexibility will allow our school, as a whole, to adapt the delivery of educational content as student needs dictate. In turn, this is expected to result in the ability of each and every student, regardless of his or her academic starting point, to make measurable academic progress throughout the school year.

Attribution: NHA

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.*

HPCA will be a K-8 school and, as such, will not have high school graduation requirements for students. Students at our school will be expected to progress academically through one grade level each year, however. Consistent with our mission, our program is designed to ensure that graduating eighth grade students have the opportunity to attend and succeed in a challenging high school program.

Our principal will have the final decision regarding the promotion, acceleration, and retention of students. The practice of promoting students who have failed to master grade-level curriculum is incompatible with our mission. If a student fails to meet the third-grade requirements of the NC Read to Achieve mandate, additional interventions and a personalized reading improvement and monitoring plan will be offered. If not proficient after these interventions, the student will be retained unless they meet a good-cause exemption. Retained students will receive additional intervention support.

Specific systems, processes, and personnel are incorporated into our school model to ensure that students do indeed receive the content, instruction, and interventions necessary to progress academically as expected. Our deans will serve as the direct managers for teachers in grade-level cohorts and

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ensure that instructional plans are aligned and scaffold appropriately across all grade levels to ensure smooth upward transitions for students.

Our formative assessment process (discussed in detail elsewhere) is designed to include multiple checkpoints throughout instruction that measure students' understanding of content. Teachers will analyze data at both the classroom and individual student level and then scaffold student learning towards mastery of each educational objective. The specificity of short-cycle formative assessments will enable teachers to determine exactly what knowledge needs further development in each student, and to individualize instruction as appropriate to ensure that each student learns as desired. School leaders will consistently review the data for all grade levels and ensure that the school's curriculum and instructional approach is accelerating student learning, and will report this information to our Board throughout the year.

For students who struggle and show indications that they may not acquire the expected knowledge and skills planned for a particular grade level, the school has a formal, comprehensive, progressive structure of intervention designed to bring those students back on track (see the section on at-risk students, below). These programs, which also are supported and informed by the school's formative assessment process, are designed specifically to ensure that by the end of one grade level, students are academically ready to transition to the next grade level.

As part of our internal assessment program, our school will administer nationally-normed exams multiple times per year. These assessments will supplement the annual state exams. Results of these assessments will allow us to gauge how our students compare to peers across the country. The intent is to ensure that each student is given the opportunity for success in high school, college, and beyond.

We plan to provide to our students a guide to area high schools and their performance to ensure that our eighth-grade graduates are aware of the opportunities available to them.

This envisioned success is real and achievable: Students attending NHA-partner schools have a tremendous track record of preparedness for high school. Ninety-six percent of students completing eighth grade at NHA-partner schools go on to graduate from high school, easily surpassing the national average for low-income students (70%) and all students combined (80%) (NCES, 2013).

Attribution: NHA

6. *If you are proposing a high school, describe how the proposed charter school will meet the Future-Ready Core requirements. Provide details on how the students will earn credit hours and how grade-point averages will be calculated?*
7. *Provide a school academic calendar in Appendix C (minimum of 185 instructional days or 1,025 hours).*
8. *Describe in a brief narrative below on how the calendar coincides with the tenets of the*

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*proposed mission and education plan.*

HPCA's school-year calendar (Appendix C) will align with the Guilford County Schools standard calendar. We will exceed the minimum instructional hours and anticipate providing over 1,100 hours of instruction. Included are 18 days dedicated to professional development (13 days before school starts and five throughout the school year), and four parent-teacher conference days. The school day will run seven hours, starting at 8:15 a.m. and ending at 3:15 p.m., and providing 6.5 instructional hours per day. Our Board will review, modify, and approve a school calendar on an annual basis.

Correspondence with Tenets of Mission and Instructional Plan: A master schedule will organize instruction, in which every attempt will be made to schedule math and ELA/reading courses in the morning, and maintain science and social studies as focused priorities in the schedule. The draft schedule provides time for daily grade-level teacher team planning meetings while students participate in specials and co-curricular areas (e.g., music, art, and physical education, etc.). Planning teams will meet at least weekly to adjust teaching based on student learning evidence.

We believe teachers and staff need to be in the classroom and will hold teachers and staff accountable for absenteeism. If a student is scheduled for a day of class, we believe the teacher should also be in the classroom. Obviously, emergencies happen and there may be academic conferences or professional development needs that take a teacher out of the classroom.

The academic calendar has been designed to enable students to learn the content included in the school's curriculum while providing instructional staff the support and professional development they need. The additional hours of instructional time will ensure the effective implementation of our mission, an environment where achievement thrives.

As part of our systematic intervention program, and in order to support student learning throughout the summer and guard against summer learning loss - especially for our at-risk students - we will implement a summer learning program. "A number of researchers have found that nearly all the differences in achievement between poor and middle class children can be attributed to changes in learning that take place over summer," (The Learning Season, Nellie Mae Education Foundation, 2007). For this reason, summer learning is a priority for our school. Two programs will be offered during the summer:

Remote Program: "Children from low-income families are likely to have less access to reading materials during the summer than middle-class children. Low-income parents typically have fewer books at home, read to their children less often, and have less educational attainment than parents in higher income families, and have less flexibility in work hours. Finally, parents who work long hours and rely on public transportation cannot easily access public libraries," (The Learning Season). For these reasons, every participating child will select eight books at their Lexile and interest level to bring home and read over the summer.

Targeted Program: Additionally, students who need the most academic support will attend a summer learning program at our school. "A body of evidence



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suggesting that carefully designed and implemented summer programs that combine the best of youth development and academic enrichment can make a difference in preventing summer learning loss. These programs embed intentional academic content in engaging, fun activities, delivered by trained staff in a context of close relationships between counselors and campers and positive social dynamics," (The Learning Season). This full-day, multi-week program will have small classes with teachers who already have a relationship with the students, focus on the foundation skills each student needs to build, and include enriching experiences to sustain student engagement.

Attribution: NHA

### **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.*

HPCA will implement a comprehensive Response to Intervention (RtI) program. A struggling student will be identified in two ways:

- All newly enrolled students will complete a screening assessment. This universal process will provide useful information for planning effective instruction and enabling the school to identify students at-risk of academic failure. We will use assessments such as NWEA MAP and MAP for Primary Grades (MPG) for this purpose. Corresponding thresholds for identifying struggling students will be set, likely students who score below the 25th percentile.
- We will comply with the NC Read to Achieve Mandate.
- Students in grades three through eight scoring below a certain score on the state's English language arts and/or mathematics exams will be identified and provided academic intervention services appropriate to their particular need.

Systematic Intervention Program: A detailed examination of student academic performance levels in the district makes it reasonable to expect that the school will open with a large percentage of students already at-risk of academic failure and significantly short of desired learning goals. Launching a school for students with these challenges will require a comprehensive approach to intervention, like NHA's systematic intervention program. We will provide this intervention from day one: we have plans to hire additional staff to provide interventions and we have created a school calendar and master schedule to ensure that time is available for daily interventions.

Our systematic intervention program is designed to stimulate early action that prevents academic failure and maximizes the effectiveness of grade-level instruction. This process is based on a framework consisting of six key practices:

- Schedule Intentionally: A strategic schedule is set for the delivery of all needed services to each identified student. Scheduling also will accommodate the dedication of the most skilled interventionists to the students with the highest needs.
- Create Collaborative Teams: Intervention staff and classroom teachers will meet every four to six weeks to discuss student assessment data, monitor

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progress, and update intervention plans. This monitoring also will include students recently exited from intervention services.

-Allocate Resources Appropriately: Our school will train all staff to understand the process of reviewing student performance data and of the thresholds established to qualify students for intervention services. School leaders NHA will collaborate with to ensure that funds are allocated in ways that will allow the school to maximize resources to best meet student needs.

-Develop Intervention Plans: Internal diagnostic assessments will be used to determine student needs, with data supporting the initiation of intervention services very soon after enrollment in the school. A written plan will be developed that details the interventions that will meet student needs, which will be a "living document" that will be updated regularly and used during decision-making about the student's learning.

-Monitor Progress: Students struggling to make progress will be assessed at a minimum every two weeks, and those students identified with the most severe academic needs will be assessed weekly. Intervention goals will be set individually based on these monitoring results, with action plans developed to achieve each goal.

-Provide Professional Development: One-on-one meetings between school leadership and intervention staff will be scheduled twice each month, and weekly coaching sessions will be set to focus on individual student data and strategies being used to meet student needs.

Attribution: NHA

## 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.*

Identification: Our staff will work with families to identify ELLs through home-language surveys, informal interviews, and the state's screening assessment (W-APT, provided by WIDA). Initially, the school will give all new students the Home Language Questionnaire (HLQ). If the HLQ indicates that a student's home language is something other than English, the student will be identified as a potential ELL. Current data indicates that we will serve seven percent ELL students.

Our ELL coordinator will conduct an informal interview of each student identified as a potential ELL. If the interview confirms that a student speaks a language other than English, the student will be given a screening assessment to determine his or her proficiency in English. If the student scores proficient (Level 5.0-Bridging) this is designated as not requiring ELL services; and the screening process will stop. If the student scores at any lower level, the student will be classified as an ELL and placed appropriately in our ELL program.

Parents or guardians will be informed in writing about our available ELL programs and services. Written in a language the parent or guardian understands, information will include the placement decision for their child

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and their right to refuse ELL services at any time. This note will be provided within 30 days for students enrolling at the beginning of the year and within 10 days for students enrolling during the year. ELLs will participate in all required state, school, and classroom assessments to monitor their progress in core content areas and English proficiency.

**Instructional Programs:** Our school will implement a two-part program: Sheltered English Immersion (SEI) will be used in the general classroom, and English Language Development (ELD) will be used for students requiring specific English language acquisition instruction. SEI will be the vehicle for ELLs to acquire grade-level content, while ELD will be used to specifically increase proficiency in English. All ELLs will have a Language Acquisition Plan (LAP) that will contain specific goals for each student to quickly acquire both social and academic proficiency in English. The LAP will detail accommodations and modifications needed in the classroom, as well as on standardized assessments to support our ELLs. ELLs will be evaluated with assessments that are aligned with state and local standards and that take into account the language-acquisition stages and cultural backgrounds.

**Monitoring and Evaluation:** Each year, we will administer the ACCESS test to measure students' progress learning English. For students not testing sufficiently proficient in English, we will use the results combined with teacher observation and input to determine services to be provided through the ELL program for the coming school year.

For an ELL to exit the program, he or she must score proficient at the state-approved level for exit on the ACCESS. In addition, the school will examine data to verify that the student's classroom performance also indicates that the student is ready to exit the ELL program and succeed without additional supports and programming. Staff will closely monitor students for four years after they leave the ELL program to ensure that they are not experiencing academic regression due to language barriers. If a student who leaves the ELL program is found to be experiencing difficulty due to language constraints, the student may be reassessed and may re-enter the ELL program.

We believe that all teachers are teachers of ELLs, and we will include ELL students in all school classes and activities at our school. ELLs will have access to high-quality instruction, and will become fully proficient in listening, speaking, reading, and writing, consistent with our goals for all students.

Attribution: NHA

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.*

Parents and guardians often encounter limitations when searching for gifted

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programs, and low-income and people of color face severe limitations in seeking gifted programs in public schools. We will work with parents and students to identify intellectually gifted (IG) students from all backgrounds, and to provide instruction that fully grows that excellence. Students who possess exceptional gifts and talents will receive the direction, time, encouragement, and resources to maximize their potential.

**Identification:** As part of our assessment program, HPCA will use an assessment in reading and mathematics that is aligned to national norms. This will allow the school to identify students who are performing at the very highest levels, a potential indicator of a student's identification as gifted and talented. For all students, we believe it is critical to ensure continued growth. For this reason, we are committed to continually monitoring students' progress and adjusting learning opportunities when growth is inadequate. In addition to using assessment results, classroom teachers will monitor mastery of curricular content, measured through classroom assessments that are administered as part of the school's formative assessment program. The formative assessment program is a planned process by which teachers and students adjust their approaches to teaching and learning based on insights from frequent, varying, and ongoing evaluations of progress.

**Instructional Programs:** Classroom teachers will offer IG students differentiated instruction and extended opportunities through a variety of means, including: enrichment lessons, exercises, and content; differentiation in content, process, products, and/or learning environment; infusion of tasks requiring higher-order thinking skills; and individualized learning opportunities. When needed, the school will accelerate grade-level or content-level learning for students, taking into consideration their specific needs. Students at or above grade-level will be consistently challenged with classroom curricular content and high-quality instruction.

We may create an entire accelerated cohort group comprised of students both above grade-level proficiency and students who are designated as gifted and talented, allowing an entire student subgroup to move through the curriculum at a more rapid pace. This will allow opportunities for students to be systematically challenged with higher-order thinking skills and project-based learning within a common peer group, and by the creation of an accelerated section at each grade level.

The school's professional development program also will include training on the education of gifted students. School leaders will be responsible for working with teachers to develop plans for addressing the needs of students identified as gifted and talented; for evaluating IG services; and, for evaluating the progress that these students make with respect to their learning goals. Other topics for professional development may include professional learning communities, differentiated instruction, and co-teaching strategies targeted to IG students. Deans will meet weekly with instructional staff to review lesson plans and provide feedback. Deans also will observe staff weekly and provide them with feedback on the quality of their instruction and effectiveness in meeting the needs of all students, including those who are gifted and talented.

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Plan to Monitor and Evaluate: The school's periodic nationally-normed assessments will generate results that help set individual learning targets and measurable objectives for all students. The school will use results from these assessments to set higher individual learning targets and more rigorous growth objectives to measure the progress of IG students.

Attribution: Board and NHA

### **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)*

Identification: Exceptional children (EC) will be identified upon entry at our school by either an active individualized education plan (IEP) or the ChildFind process. If parents of a new student state their child has previously received special education or has an IEP or Section 504 plan, we will ask the parent for documentation. If the parent has no documentation, we will initiate a records request from the prior school. Staff will also review all student files to see if they were previously enrolled in a special education program; immediately asking for relevant records if found. We will implement the student's existing IEP or Section 504 plan, until we convene a meeting to review this plan.

ChildFind: We will include ChildFind in our marketing efforts to attract the broadest possible spectrum of students, including EC students. Our outreach will use media, direct mail, and parent information meetings to target all area families with students of appropriate ages. Parents expressing interest in enrolling exceptional children will be invited to meet with our special education department to review the program and ask questions. Our school will comply with ChildFind requirements of IDEA, including 34 CFR 300.125, and Section 504, and will provide notification to parents consistent with state and federal requirements.

We will be responsible for identifying students who need special education services but enter our school without an active IEP. If a student struggles

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with classroom assignments, a teacher or parent may refer the student to the Intervention Assistance Team (IAT), which will include the principal, a classroom teacher, and the referring teacher. The student's parents may also be invited to participate. The IAT will determine appropriate education and service options by analyzing screening data, RtI results, classroom performance, discipline data, state assessments, information from the parent, and any other pertinent information. Outcomes include: implementing or continuing current intervention and progress monitoring through the RtI process; implementing conducting additional interventions; referring for a Section 504 evaluation; referring to the special education team for a possible comprehensive evaluation; and conducting no further action while monitoring academic, behavioral, and social data. In addition, in accordance with IDEA and Section 504, at any time, the parents can refer the student for a special education evaluation, and a properly convened team will decide whether to proceed with the evaluation. If parents disagree with an IEP's team decision not to conduct an evaluation, the parent has all procedural rights, including the right to request a due process hearing, as set forth in the North Carolina Handbook on Parent's Rights under Section 504.

The IEP Team will include a special education teacher, parent, a general education teacher of the child, an appropriate LEA representative, and anyone else with relevant knowledge of the child. The team will determine whether psycho-educational or other testing is needed to determine if the student has an eligible exceptionality in accordance with state policies. Parental notice and consent will be requested before testing. If eligible, this team will be responsible for identifying the student's needs, developing an IEP to address these needs, and implementing the IEP.

Record Request, Confidentiality, and Compliance: We will request records from the student's previous school or district. If complete records aren't received within 14 days of notification that the student is a special education student, we will reach out to the prior school for more information. If the requested information is not obtained, our school will initiate the special education referral or re-evaluation process. We will collect, handle, secure, and share these documents with parents in accordance with all relevant state and federal laws and regulations.

Attribution: NHA

### 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.*

Educational Programs and Staffing: We will offer exceptional children individualized services and tailored instruction that provide access to, and promote progress in, the general education curriculum. We will serve all children according to their individualized academic, functional, social, and

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emotional needs.

We are committed to serving students in the least restrictive environment (LRE), while providing the full spectrum of placements, as appropriate for each student. These placements may include the general education setting, and small-group instruction with both disabled and non-disabled peers as appropriate. We will prepare and execute individualized strategies for our full range of students, realizing that the LRE for some students may be in a more supportive alternative setting.

Students requiring specially designed instruction will have their services delivered in the general education classroom or will receive services in a resource or separate setting based on individual needs and a decision by the IEP team considering the requirement for services to be provided in the LRE. Teachers of exceptional students will be provided with consultation and staff development provided by a dean and special education supervisor or other entity to ensure that students receive the modification of instruction and assessment accommodations required by student IEPs.

The school will recruit, hire, or contract teachers in compliance with state credentialing and certified EC instructors and related services staff to help ensure high-quality instruction. All new staff, including special education teachers, will participate in an orientation session prior to the start of the school year. Each teacher will work closely with a dean on a weekly basis to focus on his or her specific professional development needs.

EC teachers will be on staff to provide academic support to students with IEPs. The school will also provide ancillary staff, such as a school psychologist, occupational and speech therapists, and a school social worker, as either employees or contracted providers. Additional staff may be added once the school determines the needs of its student population. Credentials of all staff will be reviewed to ensure compliance with the highly qualified teacher requirements, and teachers who do not possess the required credentials will be provided with a reasonable amount of time to meet state requirements. Ancillary staff will possess state-required credentials before providing services to eligible students.

**Support Systems and Oversight:** Our school will employ personnel to provide programs and services for exceptional children and manage the administrative responsibilities and compliance associated with the services. A member of the school leadership team will oversee the special education program. The principal will serve as the school's Section 504 compliance official, ensuring that the school adheres to all applicable provisions of federal and state law relating to exceptional students, including ensuring that all students qualifying under Section 504 and the IDEA receive a free and appropriate public education.

We will abide by the applicable provisions of IDEA and the Family Educational Rights and Privacy Act of 1974 as they relate to exceptional children. The school will retain this data and prepare any reports needed by the state to comply with federal and state law and regulation.

\*See overflow section for more detail.

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\*Continued from "Exceptional Children's Education Programming."

At a minimum, the role of our EC staff will include the following responsibilities: facilitate effective communication with students, parents, teachers, the school leadership team, special education staff, and appropriate social service and community-based agencies; form a partnership with the classroom teacher to develop appropriate instructional practices to meet student needs as detailed in the IEPs and act as a resource to classroom teachers; meet all requirements for special education activities at the school; schedule and hold all initial, re-evaluation, and annual review meetings pertaining to each student's special education program within required timelines; ensure compliance with all applicable state and federal special education requirements; provide instruction in a general education classroom setting to the greatest extent possible (consistent with LRE requirements); provide instruction to an individual or groups of students in a separate location, as appropriate; administer formal and informal educational assessments to guide instructional decisions when appropriate; and, maintain documentation of services, progress monitoring data, data specific to progress on IEP goals and objectives, observation logs, communication logs, and any other data specified in a student's IEP.

Monitoring IEP Implementation and Academic Progress: A dean will be designated to oversee the implementation of IEPs and 504 plans. The dean or principal will conduct weekly one-on-one meetings with EC staff to discuss EC student progress and the timing of annual reviews and three-year re-evaluations. In addition, each IEP will be reviewed to determine the duration of services to verify compliance with the student's IEP or 504 plan. Progress reports will accompany report cards, and deans will discuss student progress relative to 504 plans and/or IEP annual goals at one-on-one meetings with teachers. General education teachers will keep a record of the accommodations and modifications that are to be made in the general education setting relative to instruction and testing.

The school will administer its norm-referenced assessment multiple times each year and results will be used to gauge progress against goals. EC teachers will use this information to determine areas of critical need for EC students and make instructional decisions to positively affect student achievement. In addition to this norm-referenced assessment, EC providers will use curriculum-based assessments and other data collection tools to monitor progress on IEP goals and objectives.

Communication on IEP Implementation: Parents will be provided progress reports on IEP goals and objectives consistent with the school's report card marking period. EC teachers also will discuss these progress reports individually with students. Special Education Procedural Safeguards will be provided to each student's parent or guardian: upon referral for special education testing; at least annually when conducting an annual review of the student's IEP; whenever there is a change of placement; and, whenever a manifestation determination meeting is being conducted. School staff involved in the education of EC will meet regularly to share strategies that are resulting in the meeting of IEP academic and other goals, and discuss opportunities to improve special education programming.



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Related Services: Students with IEPs requiring related services (including speech, social work, physical, and occupational therapy, etc.) will be provided such services consistent with their IEP. Services will be provided by properly certified and licensed therapists and providers who will be employed, contracted through an agency, or, if the option is available and desired, contracted through the local school district or other entity.

Attribution: NHA

## **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.*

Goals: Briefly stated (see "Goals for the Proposed Charter School" above for additional discussion of these goals), our school performance standards are:

-Early Literacy: In both kindergarten and first grade, students will score at or above the 65th percentile in reading and math as measured by beginning-of-year to end-of-year learning growth on a nationally-normed standardized assessment.

-Comparative Success: By the third year, students at HPCA will exceed the average performance of comparable local district schools on state assessments.

-Postsecondary Readiness: Eighth-grade students in at least their third year at the school will successfully complete Math I (formerly Algebra I) and as a cohort will earn at least a 75% passing rate on the Math I end-of-course exam.

- State Accountability: Over the course of our charter term, our school will average a "Meets Expectations" growth designation on the state assessment. We will strive to "Exceed Expectations."

Evaluation Tools: The school will administer a nationally-normed assessment up to three times per year to measure academic growth. These assessments also will be used as a tool to improve instruction.

Promotion/Retention: The principal is authorized to make initial grade placement of students and has the final decision regarding the promotion, acceleration, and retention of students. A student is expected to progress through one grade each year. On occasion, it may be in a student's best interest to accelerate more than one grade or retain him or her to repeat a current grade. If a parent or teacher wishes a grade-level change to be

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considered, a written request shall be provided to the principal for consideration. These criteria will be shared with families in the parent student handbook.

If a student fails to score proficient on the state's 3rd-grade reading test and the results are validated through re-testing, additional interventions and a personalized reading improvement and monitoring plan will be offered. If not proficient after these interventions, the student will be retained unless they meet a good-cause exemption. Retained students will receive additional intervention support.

Any decision to retain an exceptional child will be determined by the principal, in consultation with the IEP Team. EC students may not be retained based solely on their exceptionality, but retention may account for factors such as a student's ability to fit in socially and emotionally with their present grade level.

Exit Standards: Students will exit our school and be promoted to high school in accordance with the North Carolina Student Accountability Standards. As stewards of student learning, however, we believe that students should leave our school academically prepared for a rigorous high school program and with the required skills, both social and academic, to graduate from high school and be college ready. The practice of promoting students who have failed to master their grade-level curriculum is incompatible with the state's gateway standards, our academic goals, and as the description of our mission states, to ensure "character, leadership, and academic development to children and families who are academically, socially, and economically at-risk for academic failure."

Attribution: Board and NHA

### **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.*

Promotion of Effective Discipline: The guiding philosophy behind our school discipline policy and our positive school culture begins with a commitment to offer families a public charter school with a challenging academic program. We will use a program called Behave with Care, which includes

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**Attribution: Board**

school-wide behavior and classroom management practices. We will establish a learning environment that ensures that students feel welcomed and supported while outlining clear rules, procedures, and structures to help students understand the consequences of their actions. This program will be used in all classrooms and grades to foster a consistency in expectations, ensure that students are familiar with the rules, and help teachers develop self-managing classrooms and reduce disruptive behavior. As a result, the discipline policy will become an embedded part of the culture of our school.

Behave with Care is designed to reinforce positive student behaviors so other behaviors become less likely. Teachers and school staff will consistently reinforce positive behavior using strategies such as relationship-building, development of classroom contracts, precise praise of positive behavior, and individual student affirmations. Teachers will set expectations for their students at the beginning of the year and will refer to and reinforce the expectations, supported by a school-wide formal behavior management system, throughout the year. Students will always know what is expected of them and will be challenged to hold themselves and each other accountable.

Our Behave with Care approach is built on research-based programs for reinforcing positive behaviors, correcting problem behaviors, setting clear expectations, and building teacher-student and peer relationships. It emphasizes preventing problem behavior, developing pro-social skills, and addressing negative behaviors by solving problems and applying consistent consequences. These proactive measures will establish and strengthen a positive culture at the school.

**Equitable Application:** We will ensure that the Behave with Care program is equitably applied to all students at the school, while remaining mindful of individual student needs. Our six-level, school-wide system clearly outlines examples of behaviors at each level and appropriate consequences. Teachers will record the details of incidents in our student information system. This will ensure that all behavior incidents are noted and treated consistently, and that records of the incidents are always available to parents. Weekly teacher observations and feedback will help ensure consistency from student to student and from classroom to classroom.

**Professional Development:** To successfully implement Behave with Care, our school will provide professional development specifically designed to help school leaders and staff build positive, productive, and trusting relationships with students. This includes training before the start of each school year, with ongoing support throughout the year in the form of additional face-to-face professional development, e-learning, virtual classroom instruction, observations with feedback and coaching, and video modeling. Teachers will learn strategies to establish safe and orderly classrooms, reinforce positive behaviors, address problem behaviors, and encourage students to take responsibility for their actions.

**Offenses; Application to Students with Disabilities; Due Process:** We will adhere to the NCDPI policies and procedures to ensure that we follow due process and grievance procedures when we are considering suspending or expelling students with disabilities or suspected disabilities.

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Attribution: Board

Attribution: NHA

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Attribution: Board

<b>Section III: Education Plan Concerns and Additional Questions</b>		
I do not see the documented evidence regarding the proposed approach; other than the quote from Marzano.	Douglas Price	Instructiona
Can documented evidence for improved outcomes be cited beyond NHA schools for this target population?  What approach will be used for high achieving students?	Nicole Charles	Instructiona
Applicant speaks of using effective, research-based instructional strategies but there is no specificity. The same applies to the formative assessment process and college-readiness assessment.	Sherry Reeves	Instructiona
Instructional methods are provided however lack specifics and a coherent description about how they will be leveraged. The applicant does not clearly provide documented evidence that the proposed approach will lead to high levels fo student achievement.	Greg Schermbeck	Instructiona
Classroom size is large especially since applicant states that the majority of students will enter the school with academic deficits. Will there be a teacher assistant in every classroom? Applicant states that there will be an extended school day and extra hours of instruction but the details state the instructional day will be 6.5 hours. That is the normal school day for the majority of schools. Where is the extra instructional time?	Sherry Reeves	Curriculum a
Is the class size in each grade suitable for the outlined differentiated, individualized instruction outlined in the design?  What are the details of the moral focus curriculum?  How much instruction time will be required to allow for the assessments proposed in addition to the state exams?  Is there staff dedicated to the high school admission process?  Is NHA data applicable for the proposed population or do NHA partner schools serve different populations?  How does the school day structure support the needs of likely students and families?  Where are the additional instructional hours built in?  How will high achieving students be engaged academically outside of the classroom given that summer learning loss can occur for all students? The targeted program appears to be for academic support	Nicole Charles	Curriculum a
Applicant needs to clarify the systematic intervention program: Is this part of the Regularly scheduled school day? Is it additional after/before school time?  Applicant needs to clarify: Aside from the 13 days at the beginning of the school year, is 5 Professional Development days throughout the year enough to provide teachers with adequate support?	Kristen Parker	Curriculum a
Appendix C is attached but lacks details. Appendix B is attached but was last updated in 2014 and appears to be a generic curriculum outline. An average class of 28 students for one teacher is a high-ratio and does not appear to be a better ratio than local district options. It is unclear how the provided curriculum tools were chosen.	Greg Schermbeck	Curriculum a
How will you attract and retain qualified teachers based on the extended hours/days on the calendar? Will teachers be compensated?	Brian Smith	Curriculum a
RTI is now MTSS. What is the "certain score" to determine which students will need	Sherry Reeves	Special Prog

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Attribution: Board

further academic interventions?		
Parents/guardians will be asked if their child/children received special education services upon entry at High Point. Is this after the lottery process has been conducted?	Brian Smith	Exceptional
Additional details should be included regarding the school's plan to fully serve exceptional children.	Greg Schermbeck	Exceptional
Will evaluation tools be used for all grades or just those listed for assessment (k-1,3, and 8)?	Nicole Charles	Student Perf
Is there an opportunity to describe the promotion standards in more detail?		
The applicant must provide rationale for the lack of rigorous goals for their students. These goals to not set a high standard for student performance. The applicant provides assessment tools yet does not specifically provide benchmarks or related data goals that should be met throughout the school year.	Greg Schermbeck	Student Perf
What will occur in the first two years on state assessments?	Brian Smith	Student Perf
What is the actual six level, school-wide system that may result in suspension? What are the grievance procedures?	Brian Smith	Student Cond
Student conduct is mentioned but incredibly limited. The applicant could provide much more detail regarding students conduct and culture. Particularly, the plan should be differentiated for the different grade levels the school proposes to serve.	Greg Schermbeck	Student Cond

Reviewer	Score
Deanna Townsend-Smith	
Sherry Reeves	Pass
Tammi Sutton	
Brian Smith	Pass
Greg Schermbeck	Fail
Steven Walker	Pass
Becky Taylor	
Robert McOuat	
Douglas Price	Pass
Kristen Parker	Pass
Glenn Allen	
Phyllis Gibbs	
Nicole Charles	Pass
Anthony Helton	Pass

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Attribution: Board

**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:* High Point Charter Academy, Inc.

*Mailing Address:* 253 N. Edgeworth St.

*City/State/Zip:* Greensboro NC 27401

*Street Address:* 235 N. Edgeworth St.

*Phone:* 336-883-7330

*Fax:* 336-883-6243

*Name of registered agent and address:* Robert J. Williams, Jr.  
2511 Kersey St., Greensboro, NC 27406

*FEDERAL TAX ID:* 81-3803349

**Tax-Exempt Status 501 (c)(3)**

The private nonprofit listed as the responsible organization for the proposed charter school has received 501 (c)(3) status:

Yes (copy of letter from federal government attached: Appendix D)  
 No

**NOTE:** If the non-profit organization has yet to obtain the 501(c)(3) status, the tax-exempt status must be obtained from the Internal Revenue Service within twenty-four (24) months of the date the Charter Application is given final approval.

**Governance and Organizational Structure of Private Non-Profit Organization:**

The private nonprofit corporation is the legal entity that has responsibility for all aspects of the proposed charter school. Its members should reflect the ability to operate a charter school from both business and education perspectives.

Please complete the table provided depicting the 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

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					<b>professional licenses?</b>
Pridell McCormick	Member	GUILFORD	Executive Director, Nonprofit		
Vicki Alston	Member	GUILFORD	Independent Business Owner		
Georgia Shepard	Member	GUILFORD	Retired Teacher		
Michelle Bodie Anderson	Secretary	GUILFORD	Community in Schools Coordinator		
Nichica Melton	Board Vice Chair	GUILFORD	Office Manager		
Shawana Torrence	Board Chair	GUILFORD	Independent Business Owner, CEO		
Robert J. Williams Jr.	Board President	GUILFORD	Pastor		

**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.*

Functions and Duties: Our Board truly understands the needs of the High Point community and have worked together for years to secure and provide high-quality education for our children. We take seriously the responsibility to uphold the expectations set forth in our mission statement and charter. Our Board will be held accountable for governance, fiscal oversight, and strategic planning, among other responsibilities, including student achievement and hiring teachers. We will perform these duties ensuring that students are learning, that funds are appropriately managed, and that our school complies with all charter, state, and federal requirements. We will review and update policies as necessary with input from our legal counsel, John Flynn of Carruthers & Roth. We learned a great deal during our attempt last year to secure a charter and we've grown as a board in our understanding of our governance responsibilities - which we've outlined in further detail below.

Roles and Responsibilities: The Board will consistently and intentionally monitor all areas of the school. Including but not limited to:

- The commitment of the school to the community, parents, and school staff.
- Reviewing and approving academic goals, along with the principal.
- Reviewing and approving school policies.
- Holding NHA accountable for the efficient and effective operation of the school and for the achievement of academic goals.



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Attribution: Board

- Monitoring performance toward academic and operating goals.
- Reviewing and approving the school's annual budgets and ensuring that proper financial procedures are in place and effectively implemented.
- Ensuring that sufficient enrichment programs are created to supplement the education program.
- Adopting, amending, and repealing bylaws as needed.
- Retaining independent legal counsel to assist in oversight, and hiring an independent auditor to conduct an annual school audit.
- Developing and maintaining effective relations with NCDPI and the Office of Charter Schools (OCS).
- Ensuring that meetings are conducted in accordance with open meetings laws and that we comply with conflict of interest and freedom of information laws.

We also will regularly receive reports on student performance and assessment data from the school, which will include information pertinent to student performance such as student count numbers, attrition percentages, attendance, discipline, percent of students below grade-level, percent of students with an IEP, and more. School leaders, with NHA as appropriate, will provide us with the information needed to assess all aspects of the school's performance.

Our Board is independent of NHA. As the charter holder for the school, we are responsible for achieving charter goals and advancing our mission. We are partnering with NHA to deliver an educational program that we are confident will serve our community well, achieve our charter goals, and advance our mission. Our Board will hold NHA accountable for results. We will retain independent legal counsel, will annually contract with an independent auditor, and will contract with a third-party evaluator of the educational program as deemed appropriate.

Hiring Lead Administrator: The Board will collaborate with NHA in hiring, evaluating, and overseeing the school principal. NHA offers an experienced and expert school leadership recruitment team that identifies and evaluates school leaders for their skills, experience, and personal attributes. NHA is experienced in evaluating both internal and external applicants, and while our Board and NHA will leverage their recruitment networks to identify qualified external applicants. During the final process, the Board will ask vital questions to the selected candidate such as, "Do you believe all students can learn?" and "How will you implement this belief?" Please see Appendix E for an organization chart outlining our intended governance structure.

Attribution: Board and NHA

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 HPCA Board is currently composed of seven Guilford County residents with qualifications including, but not limited to, the following:

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Attribution: Board

- Experienced business professional demonstrating over 30 years of progressive accountability in business, non-profit and military organizations;
- Highly focused, results-oriented leader with more than 25 years of outstanding performance in management, marketing and sales.
- Middle school teacher;
- Business Manager, Human Resources/Organizational Development, Public Relations, Community Outreach, and Profit/ Non-Profit Management; and
- Motivated, personable business professional; possessing the ability to provide exemplary customer service particularly in high pressure situations.

The mission of the HPCA is to provide character, leadership, and academic development to children and families who are academically, socially, and economically at-risk for academic failure. To achieve this mission, the Board of Directors for HPCA will govern with three primary goals:

**Ensuring Educational and Operational Success:** We fully embrace our responsibility as a Board to govern HPCA with integrity, oversee its fiscal and educational operations, and ensure that we fulfill our mission. This responsibility comes with the authority we need to make this happen: to adopt all needed policies and ensure their effective enactment; to implement the school's educational program and achieving our goals; and, to ensure that the school operates in ways that will achieve academic excellence. As we demand continuous improvement from our school, so too do we expect our Board to continually become better at its responsibilities.

**Evaluating the School and the School Leader (Principal):** We will require our principal and NHA to provide the Board with regular reports on student performance, assessment data, operational data, and any parent survey data. We will use this information to assess HPCA's progress towards our performance goals and performance of the principal. We will contract for an independent efficacy evaluation of NHA performance in meeting expectations. Under the provisions of our Services Agreement with NHA, we hold the authority to express dissatisfaction with the principal. If NHA and the principal have been given sufficient time to remedy an issue and there has been insufficient improvement, the Board can direct NHA to terminate the principal.

Additionally, our contract with NHA allows us to terminate the entire partnership at any time if we decide that is the best course of action for our school. Should we opt to terminate the agreement with NHA (which no board has ever done in the 21-year history of the organization), we retain the right to lease the school building for the remainder of the current school year and the next school year. Importantly, per-pupil funding will continue to flow to us to fund school operations independently. This will allow us to transition management to another company or to become an operational board and contract for the individual services we need.

**Involving Key Stakeholders:** HPCA will offer expanded educational opportunities to students; however, it will be imperative for parents/guardians to work with us to ensure the success of their child(ren). Parents/guardians will be encouraged to take advantage of one or more workshop activities, and may participate in workshops with our staff.

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Attribution: Board

Together with NHA, we will work in and with the community to create an expanded education opportunity that everyone can be proud of.

Attribution: Board and NHA

- 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 idea for a charter school in the Brentwood community of High Point originally came from our Board President, Reverend Robert J. Williams Jr. He has been a community activist and leader for over 40 years. He has seen first-hand the challenges faced by families and understands that education is a vehicle for a better future. Rev. Williams Jr. is the founder and initiator for HPCA and used the following factors in board member recruitment and selection:

Key criteria as our Board was developed included recruiting individuals possessing various skill-sets and backgrounds, while ensuring the Board could oversee multiple committees and bring public credibility - ensuring every Board members has clear understanding of the charter through a periodic review to ensure alignment in all organizational decisions.

Terms of Office: The initial Board of Directors shall be divided into three classes, as nearly equal in number as may be, to serve in the first instance for terms of one, two, and three years, respectively, and until their successors shall be elected and shall qualify, and thereafter the successors in each class of Directors shall be elected to serve for terms of three years and until their successors shall be elected and shall qualify. In the event of any increase or decrease in the number of Directors, the additional or eliminated directorships shall be so classified or chosen that all classes of Directors shall remain or become equal in number, as nearly as can be. In the event of the death, resignation, retirement, removal or disqualification of a Director during the elected term of office, the Director's successor shall be elected to serve only until the expiration of the term of the predecessor. Directors may be reelected with no limit on the number of terms.

Removal: A Director may be removed, with or without cause, by a vote of two-thirds of the remaining Board.

Vacancies: Any vacancy occurring in the Board and any directorship to be filled by reason of an increase in the number of directors shall be filled by the Board. A director appointed to fill a vacancy will serve for the unexpired term of his or her predecessors in office. Directors appointed to fill vacancies occurring on the Board by reason of an increase in the number of directors will be divided into three groups of directors so that the three groups of directors remain as nearly equal in number as possible.

Attribution: Board

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

Board meetings will be held monthly; information will be mailed one week

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Attribution: Board

prior. The Board will host a Board retreat during the last week of July. The Board will also complete online training webinars offered by OCS.

Attribution: Board

- 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 members will attend a two-day retreat at the beginning of each academic year (at the end of July) to review the mission, evaluate the anticipated (or previous year's) performance against our goals, and strategize to meet the objectives of the educational plan proposed here. Our retreat will also serve as an opportunity to develop additional policies as necessary.

During these trainings, the Board will also develop a clear plan that includes a schedule for Board members to review and to conduct oversight of the academic programs, strategic plan and fiscal vitality of HPCA; review descriptions of roles and responsibilities for all Board members to ensure they are accurate, thorough, and analyzed annually; and the development of a Board calendar mapping the monthly topics focused on strategic improvement, professional development to stay abreast of charter topics, program oversights, policy review, and personnel decisions.

Board members will be encouraged to participate in the United Way of Greater High Points Project Board Development program. Project Board Development is a leadership development program sponsored by the United Way of Greater High Points African-American Initiative. It is designed to identify, recruit, and train multi-cultural candidates to serve on committees and governing boards of local health and human service organizations.

The Board will conduct formative and summative evaluations. The formative evaluations will include confidential quantitative and qualitative descriptions of the students, program components, and teacher outcomes at HPCA. Process evaluation will include documentation of the relationships among resources and program activities to the program objectives so that adjustments/refinements can be made to optimize outcomes.

The following components of process evaluation will be examined: (1) target population (including demographic characteristics, academic performance by grade, reducing achievement gap strategies and outcomes; academic achievement gap closures; end-of-grade testing, outcomes of nine-week assessments); (2) goals and objectives of the program (the processes by which mission, goals and objectives to be evaluated were selected); (3) staffing patterns (staff characteristics and qualifications including those of the principal and staff, teachers); (4) innovative instructional methods implemented (frequency, duration, type of contact, training materials, manuals, staff training, teacher professional development outcomes, parent/guardian, and student perceptions of the methods and objectives of HPCA); (5) cost data including cost per service and cost per student; (6) evaluation procedures including monitoring instruments; feedback mechanisms to the board of directors, principal, teachers and staff; and (7) generalization of findings and HPCA evaluation dissemination.

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Attribution: Board

Attribution: Board

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.*

Ethical Standards and Conflicts of Interest: Our Board will govern the school with an unwavering commitment to ethical practices. This definitive standard of behavior in governance also is held by NHA. Pursuant to our bylaws, a Board member shall inform the Board of any actual or apparent conflict of interest with regard to any transaction contemplated by the Board. Conflicts of interest include transactions in which a member of the Board has a material financial interest, or with which the member is presently serving as a director, trustee, officer, or general partner of another party. The transaction may be approved only by a vote of the majority of Board members who have no conflict of interest.

Existing Conflicts of Interest: There are no known existing relationships of founding Board members that could pose an actual or perceived conflict of interest if this charter school application is approved.

Avoiding Actual and Perceived Conflicts: As noted, pursuant to the Board's bylaws, a Board member shall inform the Board of any direct or indirect conflict of interest related to any transaction contemplated by the Board. The Board will consult our legal counsel should any real or apparent conflict of interest ever arise. Our legal counsel will also provide support and advice as we review transactions for any actual and perceived conflicts of interest.

Criminal Background Checks: Our Board has completed criminal background checks for our members and included those in Appendix F.

Attribution: Board and NHA

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

Our Board will be a governing board and should have authority and responsibility for the school's fiscal and academic policies. It is the responsibility of each Board member to answer key critical questions, such as:

- Are we in compliance with our charter contract?
- How well are our students performing?
- What is our overall financial performance?
- What is the level of involvement of parents?

These questions will drive the decision-making processes for the development of school policies. Because of our school's partnership with NHA, which manages 10 operating schools in North Carolina, we have access to established school policies that have been tailored to state and charter requirements, implemented, revised, and updated by those existing boards and their respective legal counsels. The policies have also been adapted by the newest boards to meet the requirements of the state's Ready-to-Open process.

With assistance and guidance from our legal counsel, the Board will ensure

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Attribution: Board

that our school has all necessary policies and procedures in place, including those related to discipline, student records and the Family Educational Rights and Privacy Act (FERPA), special education, English Language Learner (ELL) student identification and related services, emergency procedures, and fiscal operations. School leaders, in conjunction with our legal counsel, will develop draft policies consistent with law and our operating model for consideration by the Board.

The Board will review and discuss these draft policies, revising as necessary and desired to ensure that such policies are aligned with the school's mission and are appropriately consistent with the Board's responsibilities. When in final form, we will present the policies for adoption at a public meeting.

Attribution: Board and NHA

*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.*

Committees: At this point, our Board does not intend to have any standing advisory bodies or councils. As outlined in our bylaws, our Board will designate committees as necessary. Each committee shall consist of three or more Directors elected by the Board and shall have such powers as may be delegated by the Board, except that no committee may: (i) authorize distributions to or for the benefit of Directors or Officers; (ii) approve dissolution, merger or the sale, pledge or transfer of all or substantially all of the Corporations assets; (iii) elect, appoint or remove Directors, or fill vacancies on the Board or on any of its committees, (iv) elect Officers, (v) adopt, amend, or repeal the Articles or Bylaws, or (vi) take any action the Board cannot lawfully delegate under the Articles, Bylaws, or applicable law.

Reporting Structures: Each committee shall fix its own rules governing the conduct of its activities and shall make such reports to the Board of its activities as the Board may request.

Attribution: Board

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

Parent Grievances: Classroom teachers will be the first line of communication for parents and guardians to address concerns. Teachers will respond to parent inquiries promptly, respectfully, and in accordance with our guidelines for handling parent grievances. If parents are unsatisfied with the response from their student's classroom teacher (or if the nature of the complaint does not involve a classroom teacher), parents may contact a designated member of the school leadership team to arrange a meeting to discuss the concerns. HPCA will make every reasonable attempt to respond appropriately to parent concerns in a way that resolves the issue satisfactorily.

On the rare occasion when speaking directly with the teacher or the school leadership team does not resolve the concern, parents or guardians may bring the unresolved concern to the parent relations department of NHA. This department helps parents and guardians work with school leaders to resolve

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Attribution: Board

such conflicts. Parents have several ways to report a concern. They can call the department using a toll-free number which is provided in the parent student handbook and also may be requested from the school's main office. Parents may also report concerns using the "Contact Us" page of the NHA website or by emailing NHA at its general contact email address. That address is also listed in the handbook and available from the school's main office.

If these efforts do not resolve the issue to a parent's satisfaction, concerns may be brought directly to our Board. Parents should directly contact the Board if they have concerns relating to a Board policy or decision, if there is an alleged violation of laws or the terms of the charter, or if parents have concerns about the school management or operations. Concerns brought to the Board may be presented verbally in an open meeting or in writing. The Board will address the concern at or before the next public meeting.

Procedures for Employee Grievances: We will adopt a process to help staff resolve concerns or grievances with the following features. The dean will be teachers' first line of communication for addressing concerns. Concerns with the deans will be addressed to the principal. As a second option, staff may contact a representative at the NHA Service Center. Employees also may take advantage of a third option, an employee hotline that lets them provide feedback anonymously. Concerns submitted confidentially via the hotline (online or via phone) are immediately escalated to the NHA Service Center for review. In the rare event that staff cannot resolve a concern by speaking directly with the school leaders; by communicating with an NHA representative; or, by communicating through the hotline, staff may bring the unresolved concern to our Board.

Employment between staff and the Board and NHA is on an at-will basis, and teachers will be jointly employed by the Board and NHA. Policies and procedures have been defined to handle unacceptable performance by teachers or school leaders. School leadership will have the ability to effectively identify ineffective staff, designing support programs and professional development for them as appropriate or terminating them if deemed necessary. In the event that performance is unacceptable, and depending on the particular circumstances, discipline may occur. Discipline may include a warning, creation of a performance coaching plan or performance improvement plan, or suspension/administrative leave. Employees will receive additional coaching when necessary because we hope all employees can grow and succeed. If a teacher does not meet performance expectations or if there is a significant violation of policies or procedures, termination of employment may be recommended to the Board.

Attribution: Board and NHA

### 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

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Attribution: Board

*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 E)*

2. *A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix F).*
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 G).*
4. *A copy of the articles of incorporation from the NC Department of the Secretary of State. (Appendix H)*

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

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

**Not Applicable**

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

Name of the Company: National Heritage Academies  
Address: 3850 Broadmoor Ave., SE  
Grand Rapids MI 49512  
Website: [www.nhaschools.com](http://www.nhaschools.com)  
Phone Number: 616-222-1700  
Contact Person: NaTasha Brown  
Fax: 616-954-3083  
Email: [nbrown@nhaschools.com](mailto:nbrown@nhaschools.com)

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

NHA provides a comprehensive educational program that includes curriculum, professional development, staffing, and more, including a school facility. NHA has extensive experience in the charter-school sector, serving more than 55,000 students, with more than 20,000 students on waiting lists. This includes 10 schools in North Carolina serving more than 5,300 students with waiting lists of nearly 4,000 students. Our Board knows we need this level of service to meet the needs of our students.

Best Educational Interest: NHA-partner schools have a strong academic record and long-lasting partnerships:

- A partner charter school board has never terminated its Services Agreement with NHA, reflecting long-term satisfaction by boards and a long-term commitment by NHA.
- In the past three years, 36 charters schools have been renewed. In fact, since the first NHA-partner school opened, NHA-partner schools have successfully applied for and been granted renewal of their charters on all but one occasion (in 2005, one school in New York was not renewed after



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Attribution: Board

failing to meet goals in its accountability plan).

Best Financial Interest: Our Board appreciates NHA's solid financial footing and is excited about the direct investment NHA has pledged to our school.

- Consistent with our executed Services Agreement, NHA will fund and deliver the educational program desired by the Board even if public revenues come up short of our approved budget. In this way, NHA assumes all financial risk, and our Board is guaranteed in our ability to deliver the educational program we envision.

- In building a new school, NHA typically leverages millions of dollars in private capital to create a new or renovated facility, investing in the community without taxing its residents.

Our Board and legal counsel have reviewed the Services Agreement with NHA and concluded that it provides the desired arrangement to achieve our mission and serve our community.

Attribution: Board and NHA

2. *What other EMO/CMOs were pursued and why did the applicant select this particular one?*

*Please include information regarding other management organization's fees and financial/academic records that led to the selection of the proposed EMO/CMO as the best fit for this proposed school.*

It was the recommendation of the CSAB that we reach out to a group like NHA and our discussions with NHA have assured us of their commitment to the state of North Carolina. NHA has many years of experience operating schools in this state and experience with serving at-risk student populations. Members of our founding Board have visited Gate City Charter Academy, and have had an overwhelmingly positive experience. We want the same for High Point, and the families in the surrounding areas.

Importantly, we also have discussed with NHA representatives some of the challenges faced by partner schools in this state to achieve high academic performance and how this will affect the student population we will likely serve. NHA has explained to the Board changes in personnel, school leadership, systems and processes. NHA is committed to invest and improve wherever necessary.

NHA's comprehensive model and its commitment to support that model was a key factor in the Board's decision to partner with NHA. The moral focus component of the NHA educational program also was very attractive to members of our founding Board, and a unique element from other EMOs/CMOs. Finally, we also wanted a comprehensive management arrangement where the Board could oversee and govern the school without needing to fundraise, construct a building, or participate in other activities that in previous years have taken more attention away from our primary focus to ensure excellent academic performance for our students and families. NHA offered that arrangement.

Our Board has been together for five years and worked hard to provide school choice to families in the Brentwood neighborhood. We will hold NHA accountable for our school's academic performance and financial integrity, will and have not shied away from questioning NHA in these areas, and will not hesitate to separate from NHA if it fails to live up to our

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Attribution: Board expectations.

Attribution: Board

3. *Provide and discuss student performance, governance performance and financial data from other schools managed by the management company to demonstrate how this organization is a good fit for the targeted student population. Nationally, what is the highest and lowest performing school of the EMO/CMO? Why are these two schools so different in overall achievement?*

Nationally, NHA-partner schools post impressive student success: the most recent comparable state data (2014-15) shows that nearly 80% of NHA-partner schools outperform the local district. NHA and its partner boards around the country and in North Carolina have exceptional rates of compliance and consistently clean audits, demonstrating sound governance practices.

In North Carolina, NHA partners with 10 schools. In 2015-16, three of eight operating schools exceeded growth and three met growth. QGCS, which serves grades K-12, did not meet growth and Winterville Charter Academy, a new school that opened in fall 2015 also did not meet growth. All NHA-partner schools saw gains in science proficiency in 2015-16 and six of seven also had year over year gains in math. Six of eight schools outperformed their local district in at least one subject area and five outperformed the local district in reading, math, and science. Additional highlights are below:

- Greensboro Academy (Greensboro) is the highest-performing school on the NWEA assessment. Even with this high-level of proficiency, Greensboro has regularly achieved growth rates above the national average and exceeded growth in 2015-16. For the second year in a row, GA had a letter grade of "A+NG".

- Summerfield and Wake Forest Charter Academies both exceeded growth and received "B" letter grades.

- Research Triangle Charter Academy and PreEminent Charter School both serve at-risk student populations similar to the planned HPCA students and met growth in 2015-16 after exceeding growth in 2014-15, showing that achievement gaps are closing each year.

- Two other NHA-partner schools, Gate City Charter Academy in Guilford County and Matthews Charter Academy in Mecklenburg, opened in August of 2016 and data is not yet available.

Highest and Lowest NHA-Partner Schools: On the spring 2016 NWEA assessment of math and reading, the highest-performer was Greensboro Academy with 91% proficiency. The lowest-performer was Regent Park Scholars Charter Academy (RPSCA) in Detroit, MI with 21% proficiency. The majority of students enter RPSCA well below grade-level proficiency. Additionally, like many schools in Detroit, RPSCA is struggling to maintain high levels of student attendance and retain students year-over-year. NHA and the Board of RPSCA remain committed to improving student performance at the school. On the 2015 administration of Michigan's state test, RPSCA did outperform its local district, Detroit Public Schools, in most grades and subjects tested.

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Attribution: Board

Research shows that on average students increase their academic performance each year they attend an NHA-partner school (CREDO, 2013). This is true of both new and longstanding NHA-partner schools.

Attribution: NHA

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

NHA has partner boards with years of experience governing schools and holding NHA accountable. These boards benefit from not having to focus on fundraising and day-to-day operations, but instead spend time on board development/training, strategic planning, and most importantly, academic success. Having the ability to focus on these areas gives us more autonomy in our governance structure than what we've previously proposed.

Independence: We recognize that our Board holds the charter and we are responsible for achieving our goals. We will hold NHA accountable for the academic results of our school, and for helping our Board meet our charter goals. The provisions of our Services Agreement and Lease Agreement will allow the Board substantial autonomy to govern the school and to demand this level of accountability from NHA. We have retained independent legal counsel, will contract with an independent auditor for annual financial reviews, and we will arrange an external third-party expert evaluation of our educational program as necessary.

Our Lease Agreement, separate from our Services Agreement, guarantees that HPCA can occupy the school facility for at least one additional full school year even if we terminate our management relationship with NHA (see Appendix I). This provides us the independence to dissolve our management partnership without jeopardizing the continued operation and housing of our school.

Each year, we will develop a School Improvement Plan (SIP) based on a top-to-bottom review of the school's academic performance and operations. The SIP will include action steps to improve any element of school operations and serve as another NHA accountability check.

Structure: The Board will oversee NHA and, in collaboration with NHA, will oversee the principal. The principal will oversee the academic deans and the school's administrative staff. The Board will retain the authority for the hiring and firing of teachers.

Attribution: Board and NHA

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

The relationship among school employees and NHA is detailed in our formal Services Agreement (see Article VIII of the Agreement, which appears in Appendix I). Teachers will be jointly employed by the school and NHA, and the school's principal, deans, and other staff will be directly employed by NHA. We have reviewed the Services Agreement with our legal counsel and sought advice about this arrangement, determining it is in the best interest of the school. We will work closely with NHA to ensure we have outstanding staff in place to achieve our mission.

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Attribution: Board

As outlined in our Services Agreement, we require NHA to recruit highly qualified teaching candidates for the principal's recommendation and the Board's review and eventual determination of employment. Our Board maintains the authority to express dissatisfaction with the principal, providing NHA and the principal sufficient time and support to remedy any identified issues. If insufficient improvement results, the Board can direct that the principal be terminated by NHA.

NHA's comprehensive benefits package, competitive salary structure, and quality retirement plan will serve to attract excellent educators. Additionally, our school will benefit from NHA's substantial and professional teacher-recruitment efforts and its 83 school network to find excellent staff for our school.

Attribution: Board and NHA

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

Our Services Agreement requires NHA to keep our school in compliance with our charter at all times. This includes a mandate to achieve our performance objectives.

Annual Evaluation Metrics: Accountability metrics expected to be used to hold NHA accountable for academic, operational, and financial results include:

- Academic growth, proficiency, and achievement goals (outlined in the "Goals" section of this application).
- Operational target goals, including on student attendance (at least 93% parent satisfaction (80% or higher with at least 50% of parents responding to the satisfaction survey), and fiscal soundness (an unqualified audit annually).
- NHA will be required to work with school leaders to perform a comprehensive annual review of the school's education program, developing a formal, action-specific SIP provided to our Board for review, input, and approval.
- The Board will conduct formal performance reviews of NHA as needed to meet our goals.

Contract Termination: Our Services Agreement provides the authorization and ability to terminate our partnership with NHA prior to the end of the term of the agreement (which is designed to run concurrently with the charter term), with or without cause, with 90 days' written notice. We also may terminate the agreement if NHA fails to remedy a material breach within 30 days' notice - for example, failure to account for or make expenditures approved by the Board, failure to follow Board-approved policies, or receipt of an unsatisfactory performance rating for the school. If we terminate our management relationship with NHA, our Lease Agreement will allow us to remain in the school for the rest of the school year and to rent it for another year at the existing rate. In any instance of termination, per-pupil funding aid will continue to flow to our school for the Board to finance school operations.

Attribution: Board and NHA

- 7. Is the facility provided by the EMO/CMO? Y*

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Attribution: Board

- If yes, include as Appendix J a detail of the buyout formula for the nonprofit board of directors to purchase the facility if a buyout formula or process exists.
8. *List the fund balance and surpluses for each school managed by the EMO/CMO over the last three years in North Carolina.*
  9. *Provide as Appendix K the financial history and statements of the EMO/CMO over the last three years. Specifically, if contracting with an EMO provide confirmation that the EMO is in good financial standing with either financial statements, bank letter, D & B report or credit rating.*

In 2015-16, eight charter schools partnered with NHA in arrangements like we plan to have and maintained positive fund balances over the past three fiscal years (2013-14, 2014-15, and 2015-16):

- Greensboro Academy: \$23,362, \$43,514, and \$45,446.
- Forsyth Academy: \$10,698, \$8,494, and \$8,402.
- Research Triangle Charter Academy: \$43,013, \$31,616, and \$25,837.
- PreEminent Charter School: \$37,622, \$41,352, and \$60,420.
- Queen's Grant Community School (K-8 program only): \$61,243, \$56,966, and \$57,581.
- Summerfield Charter Academy (opened fall 2013): \$30,134, \$21,605, and \$36,523.
- Wake Forest Charter Academy (opened fall 2014): \$11,446, and \$19,718.
- Winterville Charter Academy (opened fall of 2015): \$24,900.

The school audits for 2015-16 are not yet complete and figures included are thus unaudited. The budget includes a set-aside of up to \$35,000 per year for use at the school as directed by the Board. The Board may direct the expenditure of these funds for educational or extracurricular expenses outside of the model educational and operational program, or the Board may accumulate these funds into a reserve for later use. A significant benefit of HPCA's partnership with NHA is the company's commitment to providing the initial and ongoing investment needed to ensure a successful opening. This investment will include securing a facility, making contributions to ensure that the educational program is fully implemented from day one, and committing to contributing (not loaning) further financial support if revenues fall short of expenses. Our Services Agreement with NHA clarifies that NHA assumes the obligation for all expenses, and thus assumes all the financial risk. If expenses exceed revenues in any given year, NHA has the obligation to cover the shortfall.

Through both the Services Agreement and Board oversight, NHA will be obligated to manage and operate HPCA in accordance with the Board-approved budget.

Attribution: NHA

**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.***

**Not Applicable**

1. The proposed charter school will be governed by a new governing board

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Attribution: Board

2. Describe the rationale for replicating the application based upon the success of another charter school. Include documentation and evidence that the existing charter school model is successful in student achievement, charter school governance, and fiscal responsibility. Base this explanation upon academic data available through state and national summative assessments, financial audits, and state compliance reports.

We are partnering with NHA to replicate its school model. We are fortunate that there are three other NHA-partner schools in Guilford County that we can look to for guidance as we open HPCA. We will work closely with other NHA-partner schools in our area, especially the newly opened Gate City Charter Academy. We have chosen to replicate Research Triangle Charter Academy (RTCA), an NHA-partner school in Durham that opened in 2000 and now serves approximately 690 students, due to similarities in student population. The RTCA Board has demonstrated strong governance and oversight of NHA, consistently holding NHA to the highest levels of academic, organizational, and fiscal performance. The school has consistently received unqualified audits.

Student academic achievement is a key reason that we have decided to replicate RTCA. Consider the following:

- RTCA exceeded expected growth in two of the three most recent years (2013-14 and 2014-15) and met growth in 2015-16. This is an impressive trajectory of closing the achievement gap.
- On the 2015-16 EOG assessment, RTCA had a higher percentage of students college and career ready than its local LEA, Durham Public Schools.
- On the 2015-16 EOG assessment, RTCA had higher rates of proficiency than Durham public schools in reading, math, and science.
- RTCA has also engaged and satisfied parents: in spring 2016, nearly 80% of parents were satisfied and proud their children attend RTCA, similar to our proposed operational goal.

We believe that RTCA brings to life the NHA-partner school model that we desire to share with families.

At schools across the country, NHA has high academic achievement, engaged parents, and students that are given opportunities for success in high school, college, and life. For more details on NHA-partner schools, please see Appendix O.

Attribution: Board and NHA

3. Depict and analyze the current enrollment trends and student demographics of the replicated charter school model over the past three academic years.

Over the past three years RTCA has maintained a steady student enrollment averaging 648 students. Student demographics at RTCA over the past three years have reflected nearby Durham County Schools and averaged:

- Black: 74%;
- Hispanic: 18%;
- White: five percent5%;
- Other Ethnicities: three percent;
- And, about 60% have qualified for free or reduced price lunch.

RTCA is a part of the larger NHA-partner school network. Student enrollment

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Attribution: Board

at NHA-partner schools has increased over the past three years from about 44,700 students to more than 55,000 students today. On the whole, NHA-partner schools serve 68% of students categorized as minority and 66% of students qualifying for free or reduced-priced lunch.

Throughout the NHA-partner school network there are many schools that serve a similar student population to the students we hope to attract to HPCA, as demonstrated in Appendix O. The success of these schools makes a strong case for why we have chosen to replicate RTCA and partner with NHA.

Attribution: Board and NHA

4. Explain why the governing board of the proposed charter school is a good fit for the proposed student population as noted in Section II Mission and Purposes.

We believe our Board is exactly what is needed to help improve students' lives in the under served areas of our community. Together for approximately five years, our members have long-known the need for additional educational choice in High Point, one of the county's few remaining areas without a public charter school. We recognize the challenges faced by the community - including high rates of poverty, single parent households, unemployment, and low rates of academic achievement - and believe we can do something about it.

In order to manage these challenges, bring High Point Charter Academy to life, and ultimately fulfill our mission, we've established a Board that represents a diverse cross-set of skills, experience, age, and perspectives. Our Board is comprised of representatives from K-12 education with an array of experiences, certifications, and service as governing board members.

We've learned from our experiences being denied a charter application. Our discouragement did not replace our desire to serve the students and families in High Point. We took the advice of the CSAB and did additional due diligence and decided to contact our now management partner, NHA. Our systematic intervention program will provide the necessary resources for our school to quickly move students who are below grade level to proficiency.

During our conversations with NHA, witnessing currently operating NHA-partner schools in North Carolina, and reviewing data on NHA-partner schools, we believe we have the right management partner. Each Board member is invested in the High Point community, is driven to provide the best educational program we can provide, and has the expertise needed to successfully govern the school. We believe, in partnership with NHA, that we have all of personnel, systems, and processes needed to establish and operate a high-quality public charter school choice in the High Point area.

Attribution: Board

5. Provide a copy of the organization's IRS Form 990 for the last three years as Appendix N

### **Projected Staff:**

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Attribution: Board

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.

HPCA will have sufficient staff to meet the needs of our student population. We outline below the staff (in full time equivalent) that we expect when our school is full and we serve 772 students in kindergarten through eighth grade.

#### Administrative

Principal: 1.0

Dean: 4.0

Registrar: 1.0

Office Administrator: 1.0

Student Recruitment Specialist: 1.0

#### Instructional

Core Content Teachers: 28.0

Electives/Specialty Teachers: 4.0

English Language Learner Teacher: 2.5

Academic Specialists: 2.0

Intervention Paraprofessionals: 3.6

Exceptional Children Teacher(s) : 4.5

Exceptional Children Aides: 4.4

Social Worker: 1.4

Recess Aides: 1.0

Substitute Teachers: 1.5

Total Personnel : 60.9

HPCA will also benefit from the support of many NHA staff at the NHA Service Center who will provide services to our school. On our behalf, NHA will also contract for additional services including a food-service provider and janitorial staff.

Attribution: Board and NHA

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

Include the following information for the proposed charter school:

To ensure effective instruction for every child every day, HPCA will focus on recruiting and retaining excellent classroom teachers.

Recruiting: We will rely primarily on the strong candidate network and teacher recruitment capabilities of NHA, which has extensive experience staffing 83 charter schools in nine states. Our Board members' knowledge of and connections to the local community and its potential sources for teachers will supplement these efforts. Recruiting strategies among those to be used include:



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Attribution: Board

- Traditional Recruiting: NHA is constantly seeking and screening potential candidates through traditional and digital marketing strategies, including job fairs, university career fairs, social media, advertising, and direct referrals. We will advertise online, in select local markets, and throughout the NHA network of 83 operating charter schools.

- Campus Relationships: On behalf of HPCA, NHA will leverage its partnerships with colleges and universities (including NHA's relationships with the teacher education programs at NC State, East Carolina University, all UNC campuses, and others) to tap pipelines of teacher candidates. This will give our school prime access to the best student teachers and the ability to hire new high-quality teacher graduates as soon as possible.

- Referral Networks: Recognizing that most teachers find teaching positions through referrals, we will actively pursue new teacher candidates through referrals from NHA-partner schools in North Carolina and around the country.

- Career Fairs and Conferences: Recruiters and ambassadors will actively participate in local, regional, and national career fairs and conferences. This will allow direct contact with both new graduates and current teachers who are in the market for new employment opportunities.

\*See overflow section for further detail.

2. *Provide a description of the relationship that will exist between the charter school employees and the nonprofit board.*

Teachers will be jointly employed by our Board and NHA, and school leaders and other staff will be employed directly by NHA (this employment relationship is specified in our Services Agreement with NHA). Our Board will require NHA to recruit teaching candidates that meet state credentialing for the principal's recommendation and the Board's review and eventual determination of employment. Our Board will hold the school principal as well as NHA accountable for student academic performance. Our Board maintains the authority to express dissatisfaction with the principal, providing NHA and the principal sufficient time and support to remedy any identified issues. If insufficient improvement results, the Board can direct that the principal's employment be terminated by NHA.

We have been advised that this arrangement complies with NC General Statute and was reviewed and approved by legal counsel for the Department of Public Instruction in 2012. Our partnership with NHA for the employment of school personnel allows our school to use NHA's comprehensive and time-tested systems to administer employee benefits, payroll, retirement programs, employment compliance documentation, and other human resource functions. This model is in place at other NHA-partner schools in North Carolina, including Research Triangle Charter Academy.

Attribution: Board and NHA

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

Hiring; Background Checks: Our Board and NHA, will be equal opportunity employers. In addition to compensation, payroll, and employment administration functions, NHA oversees many licensure and compliance functions at its partner schools, and will do so for our school as well. Our Board will adopt a background check policy that mirrors the legally required

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Attribution: Board  
policy of GCS.

As noted above, teachers will be jointly employed by our Board and NHA. Teachers will be recommended to the Board for hiring by the principal and NHA will collaborate with and thoroughly brief the Board on personnel selected to fill school leadership positions.

Dismissing Personnel: Employment at the school will be on an at-will basis. We will create a working environment that allows administrators to make decisions sensitive to the demands of students, and that includes identifying ineffective staff, offering additional support to them, or terminating their employment as appropriate.

In the event that the performance of an employee is unacceptable, and depending on the nature, degree, and circumstances of the incident or incidents, disciplinary action may be taken. Discipline may include a warning, creation of a performance coaching plan or performance improvement plan, suspension, or administrative leave. If an employee does not meet performance expectations after appropriate interventions, or if there is a significant violation of policies or procedures, employment may be terminated. Recommendations to terminate the employment of any teacher will be presented to our Board for consideration and action.

Our employment policies and Employee Handbook will offer information on the corrective-action and termination processes. We have will provide these policies and an Employee Handbook to each employee on or before the first day of work.

Attribution: Board and NHA

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

The school budget included in this application offers detail on the proposed salaries for all positions.

Teacher salary guidelines will be implemented that differentiate pay based on market rates and performance. Teachers' starting salaries will match the weighted average of districts surrounding HPCA, ensuring that base pay is competitive in the market. Salaries will match the local market for the first three years, and beginning in the fourth year employees will be eligible for merit increases in their salary of up to four percent per year (additional increases may be available for truly exceptional teachers). Combined with a generous benefits package, an emphasis on career progression with the support necessary to grow professionally, and a respectful and professional working environment, employment at our school will be a very attractive choice.

In our budget plan, consistent with recent teacher pay increases in the state and current local supplements, we projected a salary range for core content teachers of \$39,350 to \$43,350, and used an average of \$42,500 for financial planning.

HPCA will hold staff accountable for success, measured by student academic growth and proficiency, and will have a pay-for-performance philosophy to

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Attribution: Board

appropriately recognize this success. Our school will use the "Total Rewards" compensation structure of NHA-partner schools which rewards staff who have the greatest impact on student learning and achievement. Components of the Total Rewards structure include: market increases for the first three years of teaching and merit-based salary increases after three years; competitive health insurance choices, including low employee-cost plans; retirement plan choices, including a 401(k) and Roth 401(k) with an employer-match component; life insurance; a tuition reimbursement program; and, employee recognition and reward programs.

Attribution: Board and NHA

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

Grievances: HPCA will enact a process to handle employee grievances. Our deans will be teachers' first line of communication for addressing concerns (deans will address their concerns to the principal). Staff may instead contact a representative at the NHA Service Center dedicated to handling staff issues, and also may take advantage of an employee hotline that allows them to provide feedback and raise concerns anonymously. Concerns submitted through the hotline (online or by phone) are immediately reviewed by NHA's Service Center. In the rare event that staff cannot resolve a concern by speaking directly with school leaders, or by talking with an NHA representative, staff may bring an unresolved concern to our Board.

Termination: Employment at HPCA will be on an at-will basis. Teachers will be jointly employed by the Board and NHA, and school leaders will determine the staff structure based on skill, performance, and how to best serve the needs of students. School leaders will design support and/or training programs for ineffective staff, or recommend termination of employment as appropriate.

If the performance of an employee is unacceptable, and depending on the nature, degree, and circumstances of the incident or incidents, disciplinary action may be taken. Discipline may include a warning, creation of a performance coaching plan or performance improvement plan, suspension, or administrative leave. If an employee does not meet performance expectations after appropriate interventions, or if there is a significant violation of policies or procedures, employment may be terminated. Recommendations to terminate the employment of teachers must be presented to our Board for consideration and action. The school's Employee Handbook, provided to each employee on or prior to the first day of work, will offer information on the corrective-action and termination processes.

Attribution: Board and NHA

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

No positions are expected to have dual responsibilities outside of the school. If it is necessary to have a position with dual responsibilities within the school, such as a social worker who is funded from the general budget and who also serves exceptional children through EC funding, we will ensure that the position is appropriately funded, that accounting is accurate, and that all compliance and reporting requirements are met.

Attribution: NHA

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Attribution: Board

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.*

Licensed EC teachers will be recruited to provide high-quality instruction for exceptional children. Other staff will be available to provide academic support and the school will hire or contract with a school psychologist, occupational and/or physical therapist, speech therapist, and social worker to meet the needs of students enrolling in our school. We will review credentials to ensure compliance with state credentialing requirements. Each year we will examine the need for additional staff to provide services for exceptional children, ELLs, and gifted students. Our projected first-year budget includes funding for 5.6 full-time equivalent (FTE) staff to meet the needs of exceptional children; when fully enrolled, we expect to have 9.4 FTE EC staff. We also plan to start with 1.5 FTE ELL teacher, growing to 2.5 FTE, and will adjust that number based on student need.

Attribution: NHA

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).*

As outlined in our Services Agreement with NHA, our Board will jointly employ teachers and NHA will employ the administrative and non-teaching staff at HPCA.

Principal: Our principal will be dedicated to fulfilling our mission. He or she must hold the unwavering belief that all children can and will learn. Qualified applicants will have a record of achieving significant student performance growth. Strong leadership and management skills and the ability to provide instructional support to teachers is required. The principal must be committed to and capable of developing school culture, promoting student achievement, and implementing school operations. Among the numerous responsibilities are:

- Demonstrating and modeling all aspects of the school-wide framework.
- Evaluating the educational program for conformance to state, federal, Board, and NHA standards.
- Collaborating with our Board on hiring and evaluating teachers.
- Implementing tools for parent and community communication.
- Reporting school activities and academic achievement to our Board regularly.
- Establishing school procedures and systems.
- Monitoring the use of data in lesson planning and evaluating student academic growth.

Principal candidates will have a bachelor's degree (master's degree preferred) and three or more year's related experience and/or training or equivalent combination of education and experience. They will demonstrate exceptional language skills, mathematical skills, reasoning ability, and interpersonal skills and possess all administrative licensure as required by law.

Deans: The deans will share administrative responsibilities with the principal, and have the primary responsibility for:

- Personally mastering and modeling all aspects of the classroom framework.

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Attribution: Board

- Building relationships with and among teachers and investing in the professional success of all staff.
- Coaching teachers toward instructional mastery.
- Holding teachers accountable to college readiness through development.
- Routinely analyzing student and grade-level cohort data to drive instruction, student growth, and professional development to ensure student needs are met.
- Promoting, modeling, and reinforcing all HPCA and NHA procedures.

Deans will have a bachelor's degree and a minimum of three years of experience in teaching or administration, or an equivalent combination of education and experience, and will possess administrative licensure as required by law. Deans will exhibit superior language skills, mathematical skills, and reasoning ability, and will demonstrate an effective collaborative approach to mentoring and developing their direct reports.

Teachers: Teachers will have a demonstrated ability to:

- Communicate and work effectively with parents.
- Adapt teaching style to students' specific needs.
- Adapt to differences and changes in characteristics of students, programs, leadership, staff, and community.
- Use varied teaching methodologies to accommodate students' unique learning styles.
- Evaluate tests and measurements of achievement.
- Work effectively as a team member.

Teachers will be responsible to show capabilities in implementing the curriculum with responsibilities for:

- Coordinating with interventionists.
- Maintaining current achievement level information.
- Assigning additional studies to students not meeting or exceeding achievement.
- Keeping accurate student records.
- Establishing classroom procedures.
- Ordering supplementary education materials.
- Requesting parent volunteers.
- Reporting all education-related activities to the principal.

Teachers will have earned a bachelor's degree, meet state credentialing requirements, and have the appropriate teaching licensure as required by law. EC and ELL teachers and aides also will demonstrate knowledge about education strategies particularly suited to the student populations they serve, and be appropriately certified.

Attribution: NHA

\*Continued from "Staffing Plans, Hiring, and Management."

- Workforce and Talent Pipeline Planning: NHA's workforce planning function is designed to assist our school in understanding the current local labor supply and demand in the area, helping us prepare for current and future hiring needs.

NHA currently employs more than 2,900 teachers and 2,100 supporting school staff, effectively managing recruitment and other elements of school

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staffing across the nine states in which its partner schools operate.

Retaining: The NHA-partner school model includes systems and practices designed to motivate, engage, reward, develop, and retain high-quality school faculty and staff. Importantly, our school's 'Total Rewards' approach to compensation (see more detail below) offers a very strong benefits package and opportunity for merit salary increases for staff who have the greatest impact on student learning and achievement. Our budget included in this application reflects paying new teachers above the market for hard to fill positions such as English language learner (ELL) and exceptional children teachers. We will also provide competitive health plan choices, including low employee-cost plans; retirement plan choices, including a 401(k) and Roth 401(k) with an employer-match component; life insurance; a tuition reimbursement program; and, employee recognition and reward programs.

Attribution: NHA

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

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

NHA will maintain and manage teacher licensure and professional development reporting and compliance, and will report this information to our Board and other entities as required.

Attribution: NHA

- 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 NHA-partner school model that will be used by HPCA has a robust and successful staff development structure designed to attract, train, and retain the highest-quality personnel.

Mentor: New teachers will have a mentor teacher to address daily questions and concerns. Scheduled meetings with mentors will provide ongoing support in curriculum, instructional practice, and classroom management. Mentors will also conduct periodic classroom observations and provide feedback to teachers directly after each visit to further improve classroom instruction. New teachers will also participate in the North Carolina Beginning Teacher Support Program.

Classroom teachers will work closely with their grade-level deans to target specific development needs. Each teacher will be observed weekly and meetings will be held with the dean to give feedback and coaching based on observations or other teacher-stated needs. Teachers will reflect on teaching practices, ask questions, and get coaching to address individual development needs aligned to our classroom framework teaching practices. Deans are in turn observed, coached, and evaluated by the principal on their effectiveness in supervising teachers.

Retain: Several factors combine to support retention of excellent

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instructional staff, including:

- Frequent, high-quality coaching around instructional practice.
- An extensive professional development plan and individual commitment.
- Intentional tracking of high-performing teachers to positions of greater responsibility, including as mentors, content leaders, deans; outstanding deans are coached to become principals.
- The "Total Rewards" approach to compensation, including performance-based raises.
- A school environment promoting scholarly learning and a culture of building-wide respect for all students and staff.

Evaluate: Teacher performance will be evaluated using quantitative and qualitative measures in accordance with applicable law and policy. Our school will use a pay-for-performance compensation model, with performance measured by NHA's internally developed evaluation tool and student achievement. Components are rated using a four-level scale: exemplary, effective, developing, and ineffective.

The teacher evaluation system will have the following main components:

-Classroom Culture: Teacher leads a self-managing classroom by building positive relationships, maintaining physical space, sustaining classroom routines and procedures, and holding students accountable to behavioral expectations.

-Planning: Teacher plans for instruction by identifying and analyzing standards to be taught throughout the year, aligning instructional resources and activities to those standards, and preplanning differentiated opportunities to meet individual learning needs.

-Teaching: Teacher delivers content at a level of rigor that challenges students, cognitively engages them, intentionally uses all time for learning, and personalizes instruction.

-Assessing: Teacher implements the assessment strategy to understand student learning needs, provide actionable feedback and guide instructional decisions.

-Professional Accountabilities: Teacher embodies expectations of professional accountabilities through dependability, dedication, communication, and teamwork.

-Quality of Student Learning: Teacher achieves expected performance in academic proficiency and growth as measured by state tests; makes satisfactory progress toward necessary growth expectations on norm-referenced assessments.

Deans will formally evaluate teachers using data from regular coaching sessions during the entire year, and will discuss the results with each teacher during a one-on-one session. The regular observations, feedback, mid-year check-in, and year-end evaluations will help define professional development goals for each teacher. Progress toward these goals will be included in teacher evaluations.

Attribution: Board and NHA

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*

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Attribution: Board

*uniform.*

Core Components: Supporting high-quality teaching, the instructional program at HPCA will include clear expectations, regular observations, consistent feedback, and an intentional focus on developing teaching practices. Professional development will be integrated throughout our culture, beginning with an intensive orientation and training before the school opens for its first year. Other training will be prioritized and incorporated as a purposeful element of the school calendar, and will include:

- Formal training sessions.
- Mentors assigned to new teachers.
- Regular teacher feedback and coaching sessions.
- Creation of professional learning communities.
- Daily time for common grade-level planning.
- Weekly grade-level team meetings with deans to support a common approach to instruction.
- Grade-level team meetings with the principal to ensure a unified school-wide approach to instruction.
- Grade-level and cross-grade-level team meetings will also be scheduled for teachers to share ideas for increasing student achievement.

Our partnership with NHA provides teachers with access to a variety of learning opportunities including conferences, video libraries, web-based resources, e-learning, and dedicated curriculum and instruction specialists.

Effective Implementation: Our school leaders will be responsible for determining professional development needs and will work with NHA to develop a customized plan to meet those needs. Each year, leadership will undertake a comprehensive assessment of the educational program and operations of the school and develop a SIP that analyzes student achievement, the school environment, the teacher community, the parent community, and the administration. The SIP will provide a strategic action plan to meet identified needs, and both building-wide and individualized professional development efforts will be included as necessary to meet identified needs.

Attribution: NHA

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.*

Prior to school opening: All new teachers hired prior to the start of school will participate in New Teacher Orientation (NTO), a multiday immersion program designed to ensure buy-in to the school's mission and vision and to address specific curricular and instructional needs. This training will be actively supported with ongoing coaching and additional training throughout the year. NHA has developed a collection of effective, industry-leading practices (see the 'Educational Need' section for further details), which are being implemented throughout NHA-partner schools to build a common approach designed to generate outstanding academic results. During NTO, teachers and school leaders will learn why these practices are effective and see how they play out in daily activities such as classroom management and instructional planning. NTO participants will experience these principles both as they occur in a classroom environment and as they exist throughout



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the entire school. This will empower new teachers to begin applying these practices the moment they enter our school.

A sample NTO agenda is outlined below:

- Day 1: Classroom Culture; Purpose & Vision; and, Behave with Care.
- Day 2: Classroom Culture continued.
- Day 3: Curriculum and Curricular Tools; Grade-level Best Practices.

During NTO, new teachers and leaders will begin to build our school culture by learning the practices necessary to connect with students, establish expected behaviors and routines, and manage classrooms. The session focuses on establishing a positive and proactive culture and self-management of classrooms by training teachers how to:

- structure the classroom in ways that promote responsible student behavior;
- engage students in building school culture;
- intentionally develop strong positive relationships with students;
- explicitly teach students how to behave responsibly in every classroom situation;
- focus more time, attention, and energy to acknowledge responsible behavior than to respond to misbehavior;
- and, pre-plan responses to misbehavior to ensure they are brief, calm, and delivered in a consistent manner.

All new teachers will be instructed on the principles of effective instruction and the instructional strategies used to enhance learning in each of the core content areas. Each grade-level teacher will receive specific training in the use of the curricular tool components.

Participants in NTO will have the opportunity to interact with and receive instruction from master teachers in their specific content area or at their specific grade level. The focus of these sessions includes developing classroom management plans, examining the school's moral focus curriculum, reviewing effective instructional practices, and sharing practical ideas for working with specific students. This includes new EC teachers and ELL teachers who will be trained in relevant topics by master EC and ELL teachers and expert representatives from NHA.

Ongoing opportunities: To supplement NTO, new leaders and teachers will participate in additional school-based staff-development days prior to the start of school. This professional development will communicate additional expectations to teachers and staff, including non-instructional processes and procedures, and will provide new teachers with the opportunity to conduct grade-level planning with their colleagues. These days also are designed to deepen knowledge around core concepts related to common assessments, classroom management, building student relationships, and school-wide behavior support systems. We believe that there should be no artificial limits to professional development opportunities and have structured our school's programming to reflect that view.

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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*

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*accommodate this plan.*

Our calendar, daily schedule, and staffing structure will incorporate significant professional development opportunities for teachers and leaders. Our staff also will participate in numerous professional development opportunities during the summer months, including robust preparation prior to our first school year.

As outlined above, our staff will participate in Teacher Regionals and Leadership Summit, a collaborative summer leadership training week for school leaders and teachers across NHA's 83 partner schools. A total of 18 days are allocated for professional development during the school year (13 days prior to the first day of school and five while school is in session), and will include focused time on EC students and ELLs. In addition, our daily schedule incorporates 45 minutes of planning time for each classroom teacher. At least one planning period each week will be dedicated to meeting in grade-level teams, and 30 minutes of a planning period each week will be dedicated for each teacher's one-on-one meeting with his or her assigned dean to provide feedback and coaching for development. School leaders will schedule faculty meetings at appropriate times that do not impede teaching and learning, and staff schedules will be established to permit cooperative and collaborative meetings with parents.

The school's staffing structure meshes with the daily calendar to allow core-subject teachers both individual and common planning time while student instruction in "specials" - art, physical education, music, library/technology, etc. - is occurring. To support collaboration among peers, professional learning communities will be established to allow common grade-level planning during this time. Together, teachers will review the current week's lesson plans and plan upcoming lessons with common delivery and alignment with the school's curriculum. The school's calendar and staffing plan also allow regular grade-level and cross-grade level team meetings to be scheduled where teachers can share ideas for increasing student achievement and mentor one another.

HPCA will provide robust professional development opportunities specific to instruction and services for EC students. Our staff will participate in regional EC training in cooperation with other NHA-partner schools, which will include topics such as:

- The Individualized Education Plan (IEP) and its components.
- Comprehensive Exceptional Children Accountability System (CECAS) training.
- Effective instructional practices for students with disabilities, including its application to Common Core.
- EC team member roles and responsibilities.
- Student evaluation reports.
- Positive behavior supports and building relationships with students.
- Review of NHA's detailed special education manual.
- Mission, vision, and purpose of NHA's Division of Special Education.

Our staff will also participate in regional trainings provided by NCDPI.

Finally, our staff will receive significant support from NHA's special education team to ensure that we replicate best practices. This includes the use of detailed handbooks and processes for overseeing EC programming.

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Specifically, the handbook will provide guidance on confidentiality of records, accountability, discipline procedures, maintenance of effort, and more.

Attribution: NHA

### **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.218.45(a-i) 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-218.45(e)).*

Board members' knowledge of the community and NHA's outreach expertise will form the basis of our school's marketing efforts. Together, the Board and NHA will assess the interest of prospective parents using such methods as diverse community focus groups, public opinion polls, and more. This will provide important information about parents' perceptions of the area, assess education needs that are not being met, and measure the relative attractiveness of features of our new school. (Results of our first area parent survey are in Appendix A1.)

HPCA will be a tuition-free public charter school. Any child who is of appropriate age and a resident of North Carolina may apply for admission to our school. When notified of the recommendation for approval of our application, HPCA will market among residents of Guilford County, and our community, with press releases to local media, monthly e-mails to social service agencies, Radio/TV, Public Access TV announcements, brochures, newspaper articles and interviews, Section 8 housing clients, laundromats, local bulletin boards, at street fairs, churches, libraries, Head Start centers, general stores, parades and festivals, day care centers, Department of Social Services (DSS), Women, Infants, and Children (WIC), family resource centers, and one-stop career centers. Marketing efforts will intensify and a dedicated local student recruitment specialist (SRS) with strong community knowledge will be hired (at NHA's expense) before opening of the school.

According to 2014 Census estimates, there are approximately 4,800 students between five and eleven years old in the HPCA target geography. We will recruit students from this vicinity because they are within walking distance and meet the profile identified in our mission. As we begin the construction of the school facility, families will see that we are preparing to be a vital part of the community.

School representatives will host monthly enrollment information meetings for parents at locations convenient for broad community participation. These meetings will be promoted by various means such as direct mail, digital

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marketing, and grassroots marketing. At these meetings, parents will learn more about the school's mission, design, and overall academic program, and will have the opportunity to ask questions and engage the school's representatives in productive dialogue. The school also will host events specially designed for parents of exceptional children to provide a forum that allows these families to learn more about the school's EC services. These meetings will be an open dialogue, sharing information with parents about our school, but also hearing from parents about matters important to them. Feedback from parents and guardians will directly impact the type of before- and after-school programming hosted at our school, as an example.

Parents interested in enrolling their children will be invited to special parent information meetings to learn more detail about the curriculum and moral focus emphasis, meet the principal and teachers, and learn how they can take an active role in their child's education. These meetings will also have a social component to encourage parents to come together to help us develop our school community even before the start of school.

Attribution: Board and NHA

## **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.*

Communication with Parents before Opening: Strong parental involvement often is the result of robust school-to-home communication. Our school is committed to maintaining open dialogue between parents and school leaders and teachers, starting as early as possible. As soon as our charter application is approved, we will begin building relationships with parents and informing them of our mission. Families will be contacted through a variety of practical methods to inform them about our school, the enrollment process, and how they can become involved.

Methods such as a monthly newsletter, website, and Facebook page will keep families connected to the school as it prepares to open. Social media websites will be used to establish connections between school leaders and parents. During construction, a temporary school office will be available on or very near the school site as a point of contact with staff for prospective parents. This pre-opening rapport will peak with a family orientation held at the end of the summer to allow enrolled students and their families to meet the principal, the student's teacher and classmates, and other school staff.

Engaging Parents: To encourage parents' active involvement, our school building will include a dedicated parent room. This room will give parents a place to gather and build relationships with one another, discuss matters of mutual interest, and take ownership in the school. The room will be equipped to provide parents access to online school materials and our online student information system that allows parents to monitor their children's academic

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progress, behavior, and attendance. Our student information system will also provide information related to assigned student homework, offer resources for homework assistance, present scores on various assessments and progress growth information, and post newsletters and school calendars. The system will be synchronized with teachers' monitoring of student progress, and will help remind teachers of student needs. Our school will actively engage parents in their children's learning.

During orientation parents will be provided the opportunity to see different strategies our school will use to meet students at their individual learning levels. It is our goal to work with parents/guardians to identify areas of weakness for their child(ren) and provide resources and direction to support our efforts at home as well.

We aim to have families as active participants in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class. We will engage parents through activities such as:

- orientation to HPCA, social events, and periodic coffee events with the principal;
- volunteer opportunities; and,
- HPCA committees as necessary.

We believe that effective communication is the cornerstone of parent/guardian/family involvement. Families and school staff will engage in regular, two-way, meaningful communication about student learning. Parents will have two opportunities a year, including our first year, to complete a confidential "Voice of the Parent" survey designed to ensure that parents' expectations and students' needs are understood and are being met. Voice of the Parent is designed to systematically drive action and accountability so that we remain parent-, student-, and community-focused. The feedback received will be compiled into summary statistics for use by our school leaders and Board.

Attribution: Board and NHA

## **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.*

We will comply with all applicable federal and state laws for admissions. We will not discriminate on the basis of intellectual or athletic abilities, measures of achievement or aptitude, disability, status as a handicapped

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person, homeless status, English proficiency, religion, creed, race, sex, color, national origin, or any other basis that would be illegal for a public school.

**Open Enrollment Period (OEP):** If our charter is approved, an OEP for the first year of operation will be established prior to June 30 and will be included in a notice of open enrollment. The OEP will not be shorter than 30 calendar days. At a public Board meeting, we will confirm the notice of the OEP and the application process, a process designed to ensure that people most likely to be interested in the school are informed. On our behalf, NHA will widely distribute the OEP notice.

**Applications:** Applications for the school year will be accepted beginning on the first day of the OEP. If applications received during the OEP exceed offered seats in any grade level, a random-selection process will take place. If applications received are fewer than offered seats in every grade level, all eligible applicants will be accepted.

Applications received after the OEP will not be eligible to participate in the random-selection process. If seats are available, late applications will be added to the end of the accepted list in the order received. If no seats are available, late applications will be added to the end of the waiting list or, if a late application is entitled to preference, inserted in the waiting list immediately before all applicants on the waiting list with a lower enrollment-preference category.

A list with the name of each student who submitted an application during the OEP will be created with the student's name, birth date, grade level, street address, and names and grade levels of any siblings who are also applying for admission and/or are currently enrolled siblings. From this list, an electronic card will be created for entry into the random-selection process. If siblings apply for the same school year, one surname card will be entered into the random-selection process to represent all of the siblings applying at the same time. If that surname card is selected, then all of the siblings shall be admitted, except that siblings who are not multiple birth siblings may be admitted only to the extent that space is available and does not exceed the grade-level capacity. If a card is drawn and there is no space available in the appropriate grade, applicants will be placed on the waiting list in the order in which they are drawn. After the random-selection process is complete, late applications will be processed in accordance with the procedures above.

When a seat becomes available in a particular grade due to attrition, erosion, or other event, that available seat will be offered to the first student on the waiting list for that particular grade wishing to enroll.

**Re-Enrollment:** Students enrolled in the school will be eligible to re-enroll for successive years without entering the random-selection process. All applicants on a waiting list must re-submit an application for the following school year to be eligible for enrollment.

**Preferences:** Once a student has attended the school, he or she will be given first preference to enroll for the subsequent school year. Children of

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members of our Board and children of the school's full-time employees also will be granted preference. After that, preference will be given to siblings of students reenrolling at the school.

Withdrawals/Transfers: When a student withdraws, that creates an open seat to be filled by another student through the waiting list process outlined above. Students wishing to legally transfer into the school mid-year may submit a late application, which will be processed as outlined above.

Attribution: NHA

### **Weighted Lottery**

*Does your school plan to use a weighted lottery?*

Yes:

No:

*The State Board of Education may approve an applicant's request to utilize a special weighted, or otherwise limited lottery in certain circumstances. If the charter applicant wishes to deviate in any way from the open lottery normally utilized by charter schools, the following requirements must be met:*

- 1. In no event may a lottery process illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.*
- 2. A lottery process may not be based upon geographic boundaries, such as zip code or current public school attendance zones.*
- 3. A lottery process that deviates from the standard lottery must be based upon the school's unique mission and must be based upon educationally, psychometrically and legally sound practices, protocol and research.*

*If the applicant is requesting to use a weighted, or otherwise limited, lottery, please provide the following:*

- 1. A thorough explanation of how the specific mission of the school, as set forth in the application, requires the utilization of the weighted or limited lottery.*
- 2. A thorough description of the processes and procedures the applicant intends to use to effectuate the lottery.*
- 3. The underlying research, pedagogical, educational, psychometric and legal, that supports the request and the procedures the applicant is requesting.*

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**PROJECTED ENROLLMENT**

**2018-19 through 2022-2023**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

- LEA #1 Guilford County Schools
- LEA #2 Randolph County Schools
- LEA #3 Davidson County Schools

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

	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	LEA 410	LEA 760	LEA 290	LEA 410	LEA 760	LEA 290	LEA 410	LEA 760	LEA 290	LEA 410	LEA 760	LEA 290	LEA 410	LEA 760	LEA 290
Kindergarten	80	10	10	80	10	10	80	10	10	80	10	10	80	10	10
Grade 01	68	8	8	68	8	8	68	8	8	68	8	8	68	8	8
Grade 02	68	8	8	68	8	8	68	8	8	68	8	8	68	8	8
Grade 03	68	8	8	68	8	8	68	8	8	68	8	8	68	8	8
Grade 04	68	8	8	68	8	8	68	8	8	68	8	8	68	8	8
Grade 05	68	8	8	68	8	8	68	8	8	68	8	8	68	8	8
Grade 06	0	0	0	68	8	8	68	8	8	68	8	8	68	8	8
Grade 07	0	0	0	0	0	0	68	8	8	68	8	8	68	8	8
Grade 08	0	0	0	0	0	0	0	0	0	68	8	8	68	8	8
	420	50	50	488	58	58	556	66	66	624	74	74	624	74	74
	520			604			688			772			772		



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<b>Section IV: Governance and Capacity Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Is there an effort to secure tax-exempt status prior to school opening?	Nicole Charles	Tax-Exempt S
Given the importance of parental involvement to HPCA, is mailing board meeting info enough? Is there more opportunity for families to engage with the board?  How are board members evaluated?  What evidence, beyond the short narrative, exists outlining how board members contribute to school governance?	Nicole Charles	Governance a
Appendix G & F do not appear to be attached. The applicant should provide more information regarding evaluation of the governing board outside of the three primary goals that are listed.	Greg Schermbeck	Governance a
Is there a distinction between NHA and the principal? Both have been cited as deciding promotion, graduation, and disciplinary decisions and protocols.	Nicole Charles	Proposed Man
The applicant provides a rationale for partnering with NHA however the specifics of the for-profit partnership should be explained. Given the high limits of certain budget items, NHA should specifically explain how they profit from this partnership and the profit margins they plan to collect. The applicant should also explain why the high price of these budget items (curriculum, texts, etc) are worth tax payers money compared to other viable, reasonably priced options.	Greg Schermbeck	Proposed Man
Did not see a copy of Appendix N. Information related to the rationale and detailed info of the financial performance are absent. Academic performance was present.	Douglas Price	Charter Scho
Stating higher growth / achievement rates compared to the local LEA is not specific. Data points should be provided to understand if NHA's previous performance is strong rationale to open another school.	Greg Schermbeck	Charter Scho
The applicant does not provide enough information to ensure the recruitment and retention of high-performing staff. This is especially true for a school that plans to hire 50+ FTEs.	Greg Schermbeck	Staffing Pla
Applicant needs to clarify: The role of the Principal is outlined as an instructional leader. What position will handle the day to day operations of the school?	Kristen Parker	Staffing Pla
No information provided on the retention of staff members in first question.	Douglas Price	Staffing Pla
What is the salary range for non-teaching and other staff? How will staff be retained? Who is included in the other employee category? How will part-time employment or contract needs be addressed?	Nicole Charles	Staffing Pla
How is the "total rewards" compensation with performance-based raises budgeted for?	Nicole Charles	Staff Evalua
Applicant needs to clarify: As outlined earlier in the application, you anticipate a large number of students who will be "at risk"- what specific training will teachers be given in this area?	Kristen Parker	Staff Evalua
The applicant provides generic statements regarding staff evaluation and professional development. The applicant also does not specifically address how data will be leverage in accordance with staff evaluation and professional development.	Greg Schermbeck	Staff Evalua
The applicant does not provide ample details for the recruitment and marketing plan. For a proposed school at this size, additional specifics should be provided regarding how student enrollment and staff recruitment will be met.	Greg Schermbeck	Marketing Pl
The applicant does not provide sufficient information regarding a communication plan to serve a school at the proposed size.	Greg Schermbeck	Parent and C
How is "eligible" defined in terms of the admission process?	Nicole Charles	Admissions P
Why was the decision made to add the fifth grade and double the projected enrollment from last year? Is the need in the area higher since last year?	Brian Smith	Projected St
The applicant does not provide a realistic project enrollment for year 1 or corresponding years for the school.	Greg Schermbeck	Projected St
What are the LEA projections based on? Will numbers be shifted to other LEAs	Nicole Charles	Projected St

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Attribution: Board

should the seats not be filled?		
The applicant is not planning to use a weighted lottery.	Nicole Charles	Weighted Lot
No weighted lottery is offered.	Douglas Price	Weighted Lot
N/A	Steven Walker	Weighted Lot
The applicant should provide additional information regarding underlying research, pedagogical, educational, psychometric and legal support for the planned lottery.	Greg Schermbeck	Weighted Lot

Reviewer	Score
Phyllis Gibbs	
Becky Taylor	
Robert McOuat	
Deanna Townsend-Smith	
Steven Walker	Pass
Douglas Price	Pass
Sherry Reeves	Pass
Anthony Helton	Pass
Glenn Allen	
Brian Smith	Pass
Nicole Charles	Pass
Kristen Parker	Pass
Greg Schermbeck	Fail
Tammi Sutton	

Attribution: Board

## 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.*

Aligned with Mission: HPCA will work diligently to ensure that our school is accessible to all students and that transportation needs are not a barrier to any child attending the school. We do not plan to provide bus transportation to the general student population, either directly or through contract with GCS. However, we will offer parents and guardians resources and support to coordinate their transportation needs, and we will provide transportation as required by an individual student's IEP or other applicable law.

Transportation Program: Our school will establish a program for parents called "RideFinder." This is an online tool, established in other NHA-partner schools with great success, which matches parents seeking to carpool with other parents. Parents will log in to the school's website, enter their address, and automatically see other parents who have expressed an interest in carpooling and how near those families live. Both personalized and written training on the use of this program (including appropriate reminders of the assumption of risk when operating a vehicle) will be offered by the school to all parents of enrolling students. RideFinder streamlines the process of information gathering and provides parents instant access to carpooling options within their school community.

Asking parents to partner with us in transportation, paired with our dedication to having school staff greet students and parents during morning drop-off and afternoon pick-up, provides students a transition between school and home that is comforting, safe, smooth, and welcoming. This approach also will allow staff an additional point-of-contact with parents, and provide parents with an additional opportunity to become a part of the day-to-day life of the school. This is the exact program in place at other NHA-partner schools in North Carolina. It has worked well, allowing students to arrive at school more focused on the activities of the day and with lower levels of anxiety and distraction than often attributed to school bus rides.

We recognize that this transportation strategy may not be a viable option for every family. Before the first day of school, during an orientation program for families, we will work with parents to address and coordinate their transportation needs to ensure these needs are not a barrier to any child wishing to attend the school. In addition to the RideFinder program, school staff will work to identify and plan the use of public transportation options that are available, and if needed, make arrangements with private carriers. The school's budget also has built in \$10,000 to cover the cost of such transportation needs, which also may include transportation for students who may be experiencing homelessness or exceptional children with transportation needs noted in their IEPs.

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Attribution: Board

Targeted Population: HPCA will not be targeting a specific student population for enrollment, but will be marketing to serve students throughout HighPoint. As noted, with the assistance of the RideFinder program families living near other families will be able to access all information needed for arranging carpooling or other transportation options. We recognize that our population may include students who have transportation needs, including students from outside the local area, and have budgeted funds to address those needs.

Aligned to Budget: Our transportation plan aligns with the budget plan which as noted includes an allocation of \$10,000 to cover special transportation arrangements. NHA will incorporate the RideFinder online parent tool into the school's technology network.

Attribution: NHA

### **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.*

An appropriate school meals program will be established at HPCA, and no student will lack a daily meal. As part of the daily attendance process, teachers will ask each child if he or she needs a lunch or if one was brought from home, entering the information into the student data system. If a student does not qualify for free meals or does not have enough money in his or her lunch account to purchase a meal, the teacher will notify the office so that a lunch still will be provided to that student; the school will maintain a discretionary account to be charged for this purpose if necessary to ensure that each student has lunch each day.

On behalf of our school, NHA will contract with a food-service provider to operate our program, following U.S. Department of Agriculture (USDA) procurement requirements and complying with Federal Regulation 7 CFR 210.16 and other applicable law. A hot meal for lunch will be offered daily, and a cold breakfast will be offered if needed. Students will pay a set price for school meals unless they qualify for free or reduced-priced meals under the National School Lunch Program. NHA has experience in handling all the required aspects of these programs, and the Board will hold NHA accountable to ensure the efficient management of our school's breakfast and lunch programs. As necessary, we will look to the North Carolina Department of School Nutrition Services for resources in overseeing the compliance of our food-service program.

All meals will meet the nutritional requirements set by the USDA in accordance with the National School Lunch Program. Our food-service provider will provide extensive support to the school with menu planning, nutritional analysis, food-handling safety, and sanitization.

We recognize the importance of providing healthy meals to our students, and our goal is to meet students' nutritional needs to ensure that they focus on



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Attribution: Board

*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.*

There is a dire need for more quality public school choice in and around the Brentwood area of High Point. To effectively serve students and families and realize our mission, we must have a facility that is safe, clean, and conducive to student learning. In anticipation of approval of this application, NHA's real estate acquisition team and our Board have begun an exhaustive review of area opportunities to locate a facility for our school. Both constructing a new school building and renovating an existing facility to make it suitable for our programmatic needs are under consideration. The provision of an appropriately designed facility for our faculty and students is one of the most important aspects of our partnership with NHA.

**Acquiring a Facility:** Once our charter application is approved, we will work with NHA and the necessary municipalities to complete the land use approval process for the real estate we have identified. We hope to have primary land parcels identified to share with the CSAB at a prospective interview in early 2017. NHA is very familiar with Guilford County land use approval and construction process, having successfully opened three schools within the county.

NHA makes a multi-million-dollar up-front investment to cover land use approvals, construction, and construction-related costs. The school and our Board do not pay anything. The facility, which will be financed privately, is built to house the entire planned K-8 academic program from day one, even though our school will be launched with fewer grades. Although this strategy may be more costly for NHA, it is valuable to us because it eliminates potential disruption to the academic program in future years from having to undertake additional construction while school is in session.

Being able to occupy a facility specifically designed for our planned educational program is a huge plus for our students and our faculty.

**Obtaining a Certificate of Occupancy:** The Board and NHA will ensure that we are in compliance with all building codes in the development of a facility for our school. NHA has experience and is familiar with requirements in Guilford County. We will work with our local building department to determine, in a timely manner, if modifications to an existing facility must be approved by the North Carolina Department of Insurance for building code compliance. Our Board and NHA will ensure that we receive an educational certificate of occupancy from the local building department prior to our school opening.

NHA has had recent experience in Guilford County with the opening of Gate City Charter Academy this fall. NHA has had to work around many challenges (i.e., late land acquisition, delays due to weather, etc.) in opening Matthews Charter Academy this fall, but is in the final stages of construction for its permanent facility. NHA continues to strive for improvements in its construction process and to complete facilities as early as possible. Our Board plans to closely monitor the process of the opening of the three NHA-partner schools in 2017 and apply any lessons learned to our governance during the pre-opening phase of HPCA.

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Attribution: Board

We also will ensure that we have insurance coverage for the facility at or above what is required by applicable law. Our insurance quote in Appendix L includes coverage in all required areas. Some of these items are encompassed under the property insurance and umbrella policy specifications (such as boiler and machinery, real and personal property, fidelity bonds, etc.).

Attribution: Board and NHA

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

The projected cost is \$27.81/sq. ft. Given the facility's single-use nature, a lease that is contingent upon charter renewal, and NHA's full assumption of financial risk, we are comfortable with this cost.

Attribution: Board and NHA

**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.*

Members of our Board have worked with NHA to discuss and define a target real estate search area. NHA's real estate team has begun to identify a list of suitable properties. NHA has recent experience with real estate searches and approvals in Guilford County through its existing partner schools here, especially Gate City Charter Academy, and has worked through associated hurdles for an on-time opening. NHA has learned from these challenges and will be even more prepared for a successful opening in the fall of 2018 should we receive a charter.

The total space needed for our facility is approximately eight acres, with a building square footage of approximately 48,500. This will include sufficient space for a play area, a play field, and adequate parking. The envisioned school building will include:

- approximately 28 classrooms;
- seven student support rooms;
- an art room;
- a music room;
- a media center;
- a gymnasium;
- a parent room;
- a front office;
- administrative spaces for our principal and deans;
- a teacher workroom;
- and, a conference room.

If constraints on space are needed for any reason, contingency options could include: combining the music and art rooms; consolidating administrative offices; modifying the play area, play field, or parking; and/or waiting and scaling up the number of classrooms and student support rooms only as the school grows from its starting configuration as a K-5 school to a K-8 school in our fourth year.

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Attribution: Board

Should we ever decide that the relationship we have with NHA is not providing the desired outcomes for our students and families, we will be prepared to terminate our Services Agreement with NHA. At that time we would begin looking for alternate school facility options, but, importantly, the school still will have continued use of its building. Under provisions in a separate Lease Agreement, our school is authorized to stay in the facility for the remainder of any current school year, and NHA is obliged to continue to manage and maintain the facility. Additionally, in our Lease Agreement we have the option to lease the facility for a subsequent school year at the current rate. After that, we are free to purchase the building, negotiate a new Lease Agreement (for which we would solicit advice from our independent legal counsel), or find another location for our school. In such an event, the original list of potential sites from our initial property search will serve as a ready-made starting point for locating an alternate facility.

Attribution: Board and NHA

<b>Section V: Operations Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Will not offering a bus transportation plan be a barrier to students who cannot participate in a shared ride program? Also the budget for transportation is only \$10,000 for the year-this seems incredibly low.	Sherry Reeves	Transportati
Most at risk students do not have access to the internet, how will "ride finder" benefit these students?	Brian Smith	Transportati
Does RideFinder work in schools with a large number of low wealth students who may experience issues with their cars or may not have them?  Is \$10,000 enough to cover transportations needs given the population the school anticipates serving?  At what grade does public transportation become a realistic option for students and how accessible will the school be to public transit?	Nicole Charles	Transportati
"RideFinder" and suggested carpooling does not appear to be viable carpooling options that will suffice for 500+ students in the opening year of a school. Related, \$10,000 does not appear to be enough for transportation budget. Lastly, the transportation plan does not provide a thorough explanation to ensure that all students will have access to the school.	Greg Schermbeck	Transportati
Total cost for insurance seems low.	Sherry Reeves	Civil Liabil
How will NHA recuperate the money invested (per pupil over time)?  Where will cafeteria functions occur?	Nicole Charles	Facility and
A detailed contingency plan is not included in this plan. Given that NHA is a for-profit educational company, it should be further explained how the "multi-million investment" from NHA will be paid back.	Greg Schermbeck	Facility and

<b>Reviewer</b>	<b>Score</b>
Becky Taylor	
Steven Walker	Pass
Greg Schermbeck	Fail
Brian Smith	Pass
Tammi Sutton	
Sherry Reeves	Pass
Deanna Townsend-Smith	



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Attribution: Board

Anthony Helton	Pass
Nicole Charles	Pass
Phyllis Gibbs	
Glenn Allen	
Kristen Parker	Pass
Douglas Price	Pass
Robert McOuat	

Attribution: Board

**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 2018-19**

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

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

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

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

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

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

**REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS**

**LEA #1 410 - Guilford County Schools**

Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
State Funds	\$4,993.71	420	\$2,097,358.20
Local Funds	\$2,372.86	420	\$996,601.20
Federal EC Funds	\$3,395.78	50	\$169,789.00
<b>Totals</b>			\$3,263,748.40

**LEA #2 760 - Randolph County Schools**

Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
State Funds	\$5,254.88	50	\$262,744.00
Local Funds	\$1,087.90	50	\$54,395.00
Federal EC Funds	\$3,579.70	7	\$25,057.90
<b>Totals</b>			\$342,196.90

**LEA #3 290 - Davidson County Schools**

Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
State Funds	\$5,018.08	50	\$250,904.00
Local Funds	\$1,154.28	50	\$57,714.00
Federal EC Funds	\$3,579.70	7	\$25,057.90
<b>Totals</b>			\$333,675.90

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Attribution: Board

**Total Budget: Revenue Projections 2018-19 through 2022-2023**

<b>INCOME: REVENUE PROJECTIONS</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
-State ADM Funds	\$2,611,006	\$3,136,963	\$3,607,929	\$4,087,759	\$4,127,478
-Local Per Pupil Funds	\$1,108,710	\$1,294,814	\$1,489,636	\$1,688,226	\$1,705,108
-Exceptional Children Federal Funds	\$219,905	\$314,669	\$352,236	\$390,528	\$393,783
-Other Funds*	\$2,114,556	\$1,473,120	\$1,091,295	\$809,567	\$804,723
-Working Capital*	\$0	\$0	\$0	\$0	\$0
<b>Z - TOTAL REVENUE</b>	<b>\$6,054,177</b>	<b>\$6,219,566</b>	<b>\$6,541,096</b>	<b>\$6,976,080</b>	<b>\$7,031,092</b>

**\*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 J.**

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Attribution: Board

**Personnel Budget: Expenditure Projections 2018-19 through 2022-2023**

*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	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	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:															
Principal	1	\$95,000	\$95,000	1	\$96,900	\$96,900	1	\$98,800	\$98,800	1	\$100,800	\$100,800	1	\$102,800	\$102,800
Deans	3	\$56,300	\$168,900	4	\$57,400	\$229,600	4	\$58,600	\$234,400	4	\$59,700	\$238,800	4	\$60,900	\$243,600
Registrar	1	\$35,400	\$35,400	1	\$36,100	\$36,100	1	\$36,800	\$36,800	1	\$37,600	\$37,600	1	\$38,300	\$38,300
Office Administrator	1	\$27,500	\$27,500	1	\$28,100	\$28,100	1	\$28,700	\$28,700	1	\$29,200	\$29,200	1	\$29,800	\$29,800
Student Recruitment Specialist	1	\$37,500	\$37,500	1	\$38,300	\$38,300	1	\$39,000	\$39,000	1	\$39,800	\$39,800	1	\$40,600	\$40,600
A - Total Admin and Support:	7		\$364,300	8		\$429,000	8		\$437,700	8		\$446,200	8		\$455,100
Instructional Personnel:															
Core Content Teacher(s)	19	\$42,500	\$807,500	22	\$43,300	\$952,600	25	\$44,200	\$1,105,000	28	\$45,100	\$1,262,800	28	\$46,000	\$1,288,000
Electives/Specialty Teacher(s)	4	\$40,400	\$161,600	4	\$41,200	\$164,800	4	\$42,000	\$168,000	4	\$42,800	\$171,200	4	\$43,700	\$174,800
English Learner Teacher	1.5	\$43,700	\$65,550	2	\$44,600	\$89,200	2	\$45,500	\$91,000	2.5	\$46,400	\$116,000	2.5	\$47,400	\$118,500
Academic Specialists	2	\$43,700	\$87,400	2	\$44,600	\$89,200	2	\$45,500	\$91,000	2	\$46,400	\$92,800	2	\$47,400	\$94,800
Intervention Paraprofessionals	1.9	\$19,400	\$36,860	2.6	\$19,800	\$51,480	3.1	\$20,200	\$62,620	3.6	\$20,600	\$74,160	3.6	\$21,000	\$75,600
Exceptional Children Teacher(s)	3	\$43,700	\$131,100	4	\$44,600	\$178,400	5	\$45,500	\$227,500	5	\$46,400	\$232,000	5	\$47,400	\$237,000
Exceptional Children Aides	2.6	\$19,400	\$50,440	3.5	\$19,800	\$69,300	4.4	\$20,200	\$88,880	4.4	\$20,600	\$90,640	4.4	\$21,000	\$92,400

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Attribution: Board

Social Worker	1.3	\$36,400	\$47,320	1.3	\$37,100	\$48,230	1.4	\$37,900	\$53,060	1.4	\$38,600	\$54,040	1.4	\$39,400	\$55,160
Recess Aides	.8	\$15,400	\$12,320	.9	\$15,700	\$14,130	.9	\$16,000	\$14,400	1	\$16,300	\$16,300	1	\$16,600	\$16,600
Substitute Teachers	1.1	\$13,500	\$14,850	1.2	\$13,800	\$16,560	1.4	\$14,000	\$19,600	1.5	\$14,300	\$21,450	1.5	\$14,600	\$21,900
<b>B - Total Instructional Personnel:</b>	37.2		\$1,414,940	43.5		\$1,673,900	49.2		\$1,921,060	53.4		\$2,131,390	53.4		\$2,174,760
<b>A+B = C - Total Admin, Support and Instructional Personnel:</b>	44.2		\$1,779,240	51.5		\$2,102,900	57.2		\$2,358,760	61.4		\$2,577,590	61.4		\$2,629,860
<b>Administrative &amp; Support Benefits</b>															
Health & Dental Insurance	7	\$10,320	\$72,240	8	\$10,520	\$84,160	8	\$10,730	\$85,840	8	\$10,950	\$87,600	8	\$11,170	\$89,360
Retirement Plan	7	\$1,400	\$9,800	8	\$1,460	\$11,680	8	\$1,490	\$11,920	8	\$1,520	\$12,160	8	\$1,540	\$12,320
Life & Disability Insurance	7	\$120	\$840	8	\$120	\$960	8	\$130	\$1,040	8	\$130	\$1,040	8	\$130	\$1,040
Workers Compensation	7	\$160	\$1,120	8	\$170	\$1,360	8	\$170	\$1,360	8	\$170	\$1,360	8	\$180	\$1,440
Fica/Medicare Tax	7	\$4,510	\$31,570	8	\$4,650	\$37,200	8	\$4,730	\$37,840	8	\$4,810	\$38,480	8	\$4,890	\$39,120
Futa & Suta	7	\$640	\$4,480	8	\$650	\$5,200	8	\$670	\$5,360	8	\$680	\$5,440	8	\$690	\$5,520
Tuition Reimbursement	7	\$400	\$2,800	8	\$450	\$3,600	8	\$460	\$3,680	8	\$470	\$3,760	8	\$480	\$3,840
Incentives/Stipends/Bonuses	7	\$7,280	\$50,960	8	\$7,810	\$62,480	8	\$7,840	\$62,720	8	\$7,860	\$62,880	8	\$7,900	\$63,200
<b>D - Total Admin and Support Benefits:</b>	56		\$173,810	64		\$206,640	64		\$209,760	64		\$212,720	64		\$215,840
<b>Instructional Personnel Benefits:</b>															
Health & Dental Insurance	35.4	\$10,320	\$365,328	41.8	\$10,520	\$439,736	47.4	\$10,730	\$508,602	51.4	\$10,950	\$562,830	51.4	\$11,170	\$574,138
Retirement Plan	36.1	\$770	\$27,797	42.3	\$790	\$33,417	47.8	\$800	\$38,240	51.9	\$810	\$42,039	51.9	\$830	\$43,077
Life & Disability Insurance	36.1	\$80	\$2,888	42.3	\$80	\$3,384	47.8	\$80	\$3,824	51.9	\$80	\$4,152	51.9	\$80	\$4,152
Workers Compensation	36.1	\$140	\$5,054	42.3	\$140	\$5,922	47.8	\$140	\$6,692	51.9	\$140	\$7,266	51.9	\$150	\$7,785
Fica/Medicare Tax	37.2	\$2,900	\$107,880	43.5	\$2,950	\$128,325	49.2	\$2,990	\$147,108	53.4	\$3,060	\$163,404	53.4	\$3,120	\$166,608
Futa & Suta	37.2	\$530	\$19,716	43.5	\$540	\$23,490	49.2	\$550	\$27,060	53.4	\$560	\$29,904	53.4	\$570	\$30,438

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Attribution: Board

Tuition Reimbursement	36.1	\$240	\$8,664	42.3	\$240	\$10,152	47.8	\$250	\$11,950	51.9	\$250	\$12,975	51.9	\$260	\$13,494
Incentives/Stipends/Bonuses	4	\$500	\$2,000	6	\$500	\$3,000	8	\$500	\$4,000	8	\$500	\$4,000	8	\$500	\$4,000
E - Total Instructional Personnel Benefits:	258.2		\$539,327	304		\$647,426	345		\$747,476	373.8		\$826,570	373.8		\$843,692
D+E = F - Total Personnel Benefits	314.2		\$713,137	368		\$854,066	409		\$957,236	437.8		\$1,039,290	437.8		\$1,059,532
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	63		\$538,110	72		\$635,640	72		\$647,460	72		\$658,920	72		\$670,940
B+E = H - Total Instructional Personnel (Salary & Benefits)	295.4		\$1,954,267	347.5		\$2,321,326	394.2		\$2,668,536	427.2		\$2,957,960	427.2		\$3,018,452
G+H = J - TOTAL PERSONNEL	358.4		\$2,492,377	419.5		\$2,956,966	466.2		\$3,315,996	499.2		\$3,616,880	499.2		\$3,689,392

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Attribution: Board

**Operations Budget: Expenditure Projections**  
**2018-19 through 2022-2023**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
	Administrative & Support:					
Office:	Office Supplies	\$33,700	\$22,600	\$25,500	\$28,900	\$29,500
	Office Equipment	\$11,800	\$9,800	\$10,100	\$10,600	\$10,800
Facilities	Facility Lease/Mortgage	\$1,349,200	\$1,349,200	\$1,349,200	\$1,349,200	\$1,349,200
	Rent Of Equipment	\$4,900	\$5,600	\$6,500	\$7,300	\$7,400
	Maintenance	\$194,200	\$229,300	\$76,800	\$78,300	\$79,700
	Custodial Contract	\$124,300	\$127,900	\$131,800	\$135,700	\$139,700
Utilities	Telephone	\$5,900	\$6,400	\$7,200	\$8,100	\$8,300
	Gas	\$4,900	\$4,900	\$5,000	\$5,100	\$5,200
	Electric	\$46,100	\$47,000	\$47,900	\$48,900	\$49,900
	Water/Sewer	\$4,500	\$4,600	\$4,700	\$4,800	\$4,900
	Trash	\$4,800	\$5,700	\$6,500	\$7,500	\$7,600
Transportation	Transportation Plan	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
Other	Administrative Support	\$67,900	\$64,500	\$64,300	\$64,400	\$64,200
	Contracted Services	\$9,700	\$2,600	\$2,700	\$2,700	\$2,900
	Facility Acquisition	\$225,900	\$0	\$0	\$0	\$0
	Child nutrition	\$263,100	\$307,100	\$349,300	\$393,100	\$400,600
	Insurances	\$20,500	\$21,000	\$21,500	\$22,000	\$22,400
	Legal And Audit	\$80,300	\$80,600	\$80,900	\$86,100	\$86,500
	Marketing	\$88,800	\$69,000	\$63,200	\$63,900	\$65,200
	Partner Relations	\$44,300	\$44,500	\$44,500	\$44,600	\$44,700
	Travel And Meals	\$11,100	\$11,900	\$12,700	\$13,600	\$13,900
	Other	\$42,700	\$42,800	\$43,000	\$43,100	\$43,300
	K - TOTAL Administrative & Support Operations	\$2,648,600	\$2,467,000	\$2,363,300	\$2,427,900	\$2,445,900
	Instructional:					
Classroom Technology	Technology Services	\$96,700	\$113,500	\$130,300	\$147,200	\$150,300
Instructional Contract	Staff Development	\$128,000	\$102,300	\$108,900	\$115,700	\$116,600
	Staff Recruitment & Retention	\$68,000	\$75,900	\$87,600	\$100,700	\$104,000
	Special Education Services	\$177,300	\$211,800	\$216,000	\$220,200	\$224,500
	Curriculum Development & Intervention Services	\$41,600	\$49,600	\$57,400	\$65,200	\$68,200

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Attribution: Board

Books And Supplies	Instructional Materials & Supplies	\$43,700	\$42,300	\$45,000	\$50,800	\$50,900
	Curriculum/Texts	\$260,100	\$92,900	\$98,400	\$101,400	\$49,500
	Printing & Copier Costs	\$15,200	\$17,800	\$20,300	\$23,100	\$23,600
	Student Assessments	\$39,400	\$39,800	\$41,900	\$44,500	\$44,600
Other	Instructional Equipment	\$40,300	\$46,200	\$52,100	\$58,000	\$59,000
	Field Trips	\$2,900	\$3,500	\$3,900	\$4,500	\$4,600
	L - TOTAL Instructional Operations	\$913,200	\$795,600	\$861,800	\$931,300	\$895,800
	K+L = M - TOTAL OPERATIONS	\$3,561,800	\$3,262,600	\$3,225,100	\$3,359,200	\$3,341,700



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Attribution: Board

**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
J - TOTAL PERSONNEL	\$2,492,377	\$2,956,966	\$3,315,996	\$3,616,880	\$3,689,392
M - TOTAL OPERATIONS	\$3,561,800	\$3,262,600	\$3,225,100	\$3,359,200	\$3,341,700
J+ M =N TOTAL EXPENDITURES	\$6,054,177	\$6,219,566	\$6,541,096	\$6,976,080	\$7,031,092
Z - TOTAL REVENUE	\$6,054,177	\$6,219,566	\$6,541,096	\$6,976,080	\$7,031,092
Z - N = SURPLUS / (DEFICIT)	\$0	\$0	\$0	\$0	\$0

**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.*

In our opening year, HPCA plans to serve 520 students in grades K-5. We will expand and add sixth through eighth grades to ultimately serve 772 students in grades K-8 at full-enrollment by 2021-22, our fourth year. We are confident we can attract students and fill to our enrollment targets. We know our community well and our survey results were strong.

We did not establish a "break-even" point between student enrollment and our budget. The requested size and phased growth for the school is accommodated both by our planned annual student enrollment and a pledge from our management partner to support the establishment of our complete educational program from day one. NHA has committed to contributing (not loaning) any funds necessary to cover expenses that exceed revenues in any given year, providing the school with the safety net we need on student enrollment projections. While we are confident that we will meet our enrollment estimates included here, and thus revenue projections, the pledge of support by NHA assures our Board that we will never be in a position that requires cuts to our planned educational program.

Additionally, our partnership with NHA helps to ensure that we will always have the necessary cash on hand to meet all short-term obligations - importantly, including payroll - even prior to receiving the state, local, and federal funds due to the school. This is a significant benefit in the early years of our school, easing and improving our financial planning process.

Attribution: Board and NHA

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

Our Services Agreement with NHA offers all funds necessary to cover expenditures that exceed revenues in the school's early years, allowing a phased growth for our school (see the letter of financial commitment in

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Attribution: Board

Appendix M). The budget is conservative overall, and includes an expected contribution from NHA of approximately \$1.6 million in the first year of operation, \$870,000 in Year 2, \$400,000 in Year 3, \$25,000 in Year 4, and \$13,000 in Year 5. These are contributions to the school, not loans, and no repayment is required. These contributions allow us to provide the full school facility and academic program in year one, even though we will start with fewer students. Beyond our fifth year, revenue is estimated to be sufficient to cover the school's operating costs.

Our Services Agreement also affirms NHA's commitment to providing sufficient revenue to meet the school's budgeted expenses if ever public revenues do not cover our required needs.

Attribution: Board and NHA

*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*

As described above, the budget projections in the first few years of operation include contributions - not loans - from NHA, with no financial repayment obligations whatsoever on the school or the school's Board. NHA contributions are included in the line item "other funds," combined there with federal entitlement funds and a small amount of funds projected from food sales to students. NHA contributions are budgeted at approximately \$1.6 million in the first year of operation, \$870,000 in Year 2, \$400,000 in Year 3, \$25,000 in Year 4, and \$13,000 in Year 5.

Attribution: NHA

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

16:1 - \*See overflow section for further detail.

- 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 Services Agreement with NHA calls for NHA to provide the school with all necessary staffing, school services, and back-office functions, including purchasing, accounting, business services, informational technology, data reporting, data warehousing, human resources, and payroll.

NHA uses a standardized human resource, purchasing, and payroll software system to internally manage all transactions related to the personnel, purchasing, and payroll functions. This administrative infrastructure supports full compliance with generally accepted accounting principles. NHA effectively manages compensation, payroll, and compliance for approximately 5,000 school-based employees in nine states, and has the experience and efficiency to properly provide these services to our school. On behalf of our school, NHA will follow applicable state and federal law with respect to the selection of contractors and large purchases on behalf of the school, including competitive bidding or sole-source documentation as applicable.

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Attribution: Board

Attribution: NHA

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

HPCA will annually maintain a balanced budget. Our school's management partner, NHA, has an established record of opening and operating 83 schools in nine states, and at each school has ensured the establishment of the educational program by combining needed additional contribution with the amount of public revenue received. Not a single NHA-partner school has closed because of financial difficulties of any type.

No school has ever terminated its management arrangement with NHA. We believe that this is a testament to NHA's ability to develop budgets and structures that provide the proper level of financial commitment to the priorities of each partner school's educational program. At HPCA, these priorities include: systematic intervention, a robust professional development program; a distributed leadership model that allows greater coaching of classroom teachers; a full curricular program that emphasizes the core areas of math, ELA, science, and social studies while also allowing for art, music, physical education, and other "specials"; and a meaningful moral focus program. NHA-partner schools, already marked by a competitive salary and employee benefit structure, recently implemented a "Total Rewards" strategy to offer more competitive salaries and benefit package choices, making schools such as ours even more attractive to high-performing employees and helping better create an atmosphere that allows excellent teachers to take advantage of opportunities to grow in responsibility and leadership.

We will work diligently to ensure that the school is accessible to all students, and that transportation needs are not a barrier to any child attending the school. The school's budget includes \$10,000 to cover the cost of such transportation needs, which may include transportation for students experiencing homelessness or exceptional children with transportation needs noted in their IEPs.

NHA's development of our school facility and our Lease Agreement for that facility supports that no funds from banks, other lending institutions, outside corporations, foundations, or other sources will be needed to cover our occupancy costs.

Attribution: Board and NHA

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.*

The budget includes a set-aside of two percent of per pupil revenue, up to \$35,000 per year, for use at the school as directed by the Board. The Board may direct the expenditure of these funds for educational or extracurricular expenses outside of the educational and operational model, or the Board may accumulate these funds into a reserve for later use. NHA is committed to providing the educational program we have proposed here according to the budget the Board approves, regardless of any fluctuations or shortfalls in public revenue.

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Attribution: Board

This support is detailed in our Services Agreement with NHA, which clarifies that NHA assumes the obligation for all expenses, and thus assumes all the financial risk. Because the obligation to cover planned costs is NHA's, the need for the school to maintain a sizable fund balance is negated. We have spoken with Board members at both long-standing and new NHA-partner schools and confirmed NHA's financial commitment to its partner schools.

Through both the Services Agreement and Board oversight, NHA will be obliged to manage and operate the school in accordance with the budget approved by the Board, and expenditures during the academic year are not to deviate materially from the approved budget. Of course, as necessary the Board will review and approve amended budgets based on student need, and this could require additional spending, which NHA is again obligated to provide.

Should our Board ever decide that it is best for our students if we separate from NHA, we will be able to continue leasing the facility and will have per-pupil revenues to fund operations while we make decisions on how to replace management services or operate the school ourselves. And while there is no substantial surplus envisioned, there also will be no deficit because of NHA's funding commitment. Therefore our Board would not have any debt to cover should we ever terminate our partnership with NHA. In fact, as noted earlier in this application, the experience of other NHA-partner schools in North Carolina shows each of these schools consistently ending each year with a small budget surplus.

We recognize the guidance from the NCDPI that schools show additional indicators of financial viability beyond the proposed Services Agreement with NHA. NHA-partner schools in North Carolina (as well as in the other eight states where NHA partners with local boards to operate schools) consistently receive unqualified audits, meet total margin ratios, and do not carry long-term debt. No school partnering with NHA has ever been closed for financial reasons, and NHA has never walked away from a partnership with a school, even when enrollment or funding at the school has decreased.

In accordance with our Services Agreement, our Board will retain a discretionary expenditure fund to be used for Board-driven school purposes and programs. We are contemplating using these funds to create a fund balance and may set aside up to half of these funds each year to build an ongoing fund balance. We will revisit our fund balance needs after each year of operations as part of our annual evaluation of the performance of NHA. If, as we believe will occur, we are satisfied with the performance of NHA and with the strength the Board has under our Services Agreement, we will be comfortable choosing to reinvest these funds in the educational program at our school. Our budget with this application does not reflect this potential surplus, as we chose to project satisfaction with our programming.

Attribution: Board and NHA

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

This budget assumes that no funds from banks, other lending institutions,

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If you have questions regarding the application process, please contact the Office of Charter Schools via email at [deanna.townsend-smith@dpi.nc.gov](mailto:deanna.townsend-smith@dpi.nc.gov).

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Attribution: Board

outside corporations, foundations, or other sources will be needed. We plan for our school to start as a K-5 school and to grow over the next three years to a K-8 school. Our educational program will be fully established and implemented from day one nonetheless, and we recognize the wisdom of initially occupying a facility that has been constructed to house our full K-8 model. Accordingly, NHA has pledged contributions sufficient to meet operating expenses above revenues received in the school's early years and provides as part of its partnership a school facility built to house our school at full capacity. Appendix M includes a letter of revenue assurances from NHA, which further details the organization's initial and ongoing commitment to our school, and Appendix I includes our executed Services Agreement with NHA, detailing the financing structure for our school.

Attribution: NHA

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

The school will not have assets from other sources. Through our Services Agreement, NHA will purchase and provide assets on behalf of our school.

Attribution: NHA

\*Continued from "student to teacher ratio."

The budget is not built on a specific student-to-teacher ratio, and the main drivers for budget expenditures are the number of students served, the number of classrooms used, and overall operational costs borne by the school. As the school grows in the first five years by adding grade levels and classrooms in the, so too does the projected staffing. The planned staffing pattern allows for a concentration of core subject teachers while offering co-curricular classes (music, art, physical education, etc.), and provides for staffing for special-needs students. The staffing model and budget reflect a 15 pupil-to-instructional staff ratio in our first three years and a 16 pupil-to-instructional staff ratio in our fourth and fifth year, when the school serves grades K-8.

Core Content Teachers: YR 1 - 19.0; YR 2 - 22.0; YR 3 - 25.0; YR 4 - 28.0; YR 5 - 28.0

Electives/Specialty Teacher(s): YR 1 - 4.0; YR 2 - 4.0; YR 3 - 4.0; YR 4 - 4.0; YR 5 - 4.0

ELL Teachers: YR 1 - 1.5; YR 2 - 2.0; YR 3 - 2.0; YR 4 - 2.5; YR 5 - 2.5

Exceptional Children Teachers: YR 1 - 3.0; YR 2 - 4.0; YR 3 - 5.0; YR 4 - 5.0; YR 5 - 5.0

Exceptional Children Aides: YR 1 - 2.6; YR 2 - 3.5; YR 3 - 4.4; YR 4 - 4.4; YR 5 - 4.4

Academic Specialists: YR 1 - 2.0; YR 2 - 2.0; YR 3 - 2.0; YR 4 - 2.0; YR 5 - 2.0

Intervention Paraprofessional: YR 1 - 1.9; YR 2 - 2.6; YR 3 - 3.1; YR 4 - 3.6; YR 5 - 3.6

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Attribution: Board

Enrollment: 520 604 688 772 772

Teacher & Aides: Pupil Ratio: 15 15 15 16 16

Attribution: NHA

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Attribution: Board

**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?*

Our Board will establish a fiscal management policy requiring adequate internal controls, and our Board will ensure that these controls are followed consistently by the school and by NHA. Examples of internal controls surrounding our financial processes include the following:

- Regular review of payroll information and reconciliation to employee master file.
- An established signatory authority for bank accounts and monthly account reconciliation.
- Requirement for review and approval of purchase order requests.
- Monthly review of budget-to-actual detailed financial statements.
- Use of an integrated computerized accounting system that manages all purchasing, general ledger, grant accounting, fixed assets accounting, payroll, personnel and cash receipt/disbursements activities, and provides for segregation of duties.

Additionally, NHA has formal written policies for purchasing, accounts payable, travel, the use of corporate credit cards, Board discretionary funds, principal discretionary funds, school money handling, deposits, and security. Our Board will review these policies with legal counsel, revise them as deemed necessary, and adopt all needed policies.

We will engage an independent auditor each year to perform a financial audit of the school. The audit fieldwork will be conducted in a timely manner to ensure that the audit report will be completed by the state-specified deadline and will include tests of compliance with state laws and regulations. The audit expense will be included in the school's Board-approved budget.

Attribution: Board and NHA

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

There are no known related-party transactions that will occur at our school, nor do we foresee any possible related-party transactions. Our Board bylaws require the avoidance of conflicts of interest and we will also adopt a conflict of interest policy.

Attribution: Board and NHA

*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.*

Our Board is currently considering the following audit firms:

Name: BDO USA, LLP

Address: 5430 Wade Park Blvd Suite 208, Raleigh, NC 27607



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Attribution: Board

Phone Number: 919-754-9370

Name: Deloitte & Touche, LLP

Address: 550 S. Tryon Street, Ste. 2500, Charlotte, NC 28202

Phone Number: 704-887-1500

Name: Plante Moran

Address: 634 Front Ave NW, Grand Rapids, MI 49504

Phone Number: 616-774-8221

We also have included details on the overview of the audit process in Appendix O.

Attribution: Board



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Attribution: Board

<b>Section VI: Financial Plan Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Revenues do not appear realistic given the high-number of students slated for the first year of the school. A more detailed student enrollment plan should be included.	Greg Schermbeck	Budget Reven
Revenue projections are not realistic given the high-number of students slated for the first year of the school. Given that NHA is a for-profit management company, the applicant should further explain the revenue assurance arrangement in full details. The \$2,114,556 of "Other Funds" should be fully explained in great detail.	Greg Schermbeck	Total Budget
Other funds provided by NHA?	Sherry Reeves	Total Budget
Salary is low for intervention paraprofessionals and EC aides.	Sherry Reeves	Personnel Bu
Does include FLSA (non-exempt overtime) considerations?  How will the board ensure quality service for support area while paying aides less \$20,000 and no benefits?	Nicole Charles	Personnel Bu
\$95,000+ seems rather high for a Principal during the first year of a charter school. The applicant does not provide a realistic budgetary projection.	Greg Schermbeck	Personnel Bu
What is the rationale for fractions of positions in school personnel? Why will the electives/specialty teacher earn less than she or he would as an entry level teacher at a North Carolina public school?	Brian Smith	Personnel Bu
Facility lease equals more than \$100K per month. Totals for maintenance and custodial contract also seem quite high. Marketing is \$88,800 in year 1 and decreases a little over next 4 years but is still \$65,000 in year 5. Why so high? Transportation and contracted services are too low. Why is there a cost for facility acquisition if there are monthly mortgage/lease costs?	Sherry Reeves	Operations B
\$10,000 is not a realistic budget for transportation. \$124,300 seems like a high for custodial services. \$194,200 seems high for maintenance and the large drop in this budget item over the 5 year period should also be explained. \$260,000 seems incredibly high for curriculum / textbooks. This should be justified and explained in great detail. Many of these budget items seem unjustified and should be explained in great detail.	Greg Schermbeck	Operations B
Are the transportation and child nutrition budgets adequate given the large number of students anticipated?	Nicole Charles	Operations B
What is "other" in the other category paying for?	Brian Smith	Operations B
NHA partner school - no surplus.	Steven Walker	Total Expend
\$0 Surplus for all five years does not ensure the school will be financially viable.	Greg Schermbeck	Total Expend
No surplus in budget. Does NHA get all funds?	Sherry Reeves	Total Expend
The school is relying heavily on NHA for funding outside of the per pupil funding, have any other funds been identified?	Nicole Charles	Budget Narra
No break even number is given; board is relying on NHA to make necessary adjustments if anticipated enrollment is not met.	Sherry Reeves	Budget Narra
The applicant provides no data that support that 500+ students will enroll in their first year. The applicant does not describe a solid financial contingency plan. A \$0 Surplus is projected.	Greg Schermbeck	Budget Narra
I am rating "Pass" on the overall budget even though I have noted some serious concerns with the budget.	Sherry Reeves	Financial Au

**Reviewer**

**Score**

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Attribution: Board

Deanna Townsend-Smith	
Kristen Parker	Pass
Tammi Sutton	
Anthony Helton	Pass
Glenn Allen	
Sherry Reeves	Pass
Becky Taylor	
Douglas Price	Pass
Phyllis Gibbs	
Greg Schermbeck	Fail
Robert McQuat	
Nicole Charles	Pass
Steven Walker	Pass
Brian Smith	Pass

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Attribution: Board

**VII AGREEMENT PAGE**

**Application Fee:**

*Pursuant to § 115C-218.1(c) 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 19, 2016 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 19, 2016 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-218.1(c).*  
storrence18 Date: 09/15/2016

**Applicant Signature:**

The foregoing application is submitted on behalf of High Point 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. Additionally, we understand the final approval of the charter is contingent upon successful completion of a mandatory planning year. Per SBE policy TCS-U-013 All new nonprofit boards receiving a charter must participate in a year-long planning program prior to the charter school's opening for students. The planning year provides an applicant time to prepare for the implementation of the school's curricular, financial, marketing, and facility plans. During this planning year, regular meetings are held with the Board of Directors and consultants from the Office of Charter Schools to provide information on the following topics: school opening plans, staff development, finance, governance, board training, marketing, policies and procedures, securing a school site, and hiring a school administrator. Final approval of the charter will be contingent upon successfully completing all of the planning program requirements.

Print/Type Name: storrence18

Board Position: Board Chair, Shawana Torrence

Signature: \_\_\_\_\_

Date: 09/15/2016

Sworn to and subscribed before me this  
\_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.  
\_\_\_\_\_

High Point Charter Academy - The mission of High Point Charter Academy (HPCA) is to provide character, leadership, and academic development to children and families who are academically, socially, and economically at-risk for academic failure.

Attribution: Board

Notary Public

Official Seal

My commission expires: \_\_\_\_\_, 20\_\_\_\_.

Attribution: Board

## OVERALL ASSESSMENT

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.

<b><u>Total External Evaluator Votes</u></b>	
<b>No</b>	<b>Yes</b>

Would you, as a subcommittee, recommend an interview for this application? Remember that a subcommittee is not a quorum of the whole Advisory Board and has no authority to bind the Advisory Board to a particular recommendation. This rubric, and the following recommendation, is simply a starting point for Advisory Board deliberations regarding which applicants to invite back for an interview.

<b><u>Total Subcommittee Votes</u></b>	
<b>No</b>	<b>Yes</b>

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.

<b><u>CSAB Votes</u></b>	
<b>No</b>	<b>Yes</b>

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

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<b><u>Initial Screening</u></b>	
<b>Mission, Purposes, and Goals</b>	Some of the goals lack specific measures. - theltoncsab
<b>Education Plan</b>	- theltoncsab
<b>Governance and Capacity</b>	Applicant has 24 months after approval to obtain tax exempt status - theltoncsab
<b>Operations</b>	- theltoncsab
<b>Financial Plan</b>	- theltoncsab
<b>OVERALL</b>	- dtsmith840 - theltoncsab - theltoncsab

<b><u>External Evaluator</u></b>	
<b>Mission, Purposes, and Goals</b>	<p><u>Mission Statement</u> Does the targeted population align with the mission of the school? - brian_smith2</p> <p><u>Mission Statement</u> How will the non-academic aspects in the mission be actualized in the curriculum? - nacharles</p> <p><u>Mission Statement</u> It is concerning that this school is not targeting a specific student population. This also doesn't align with the mission statement of focusing on "at-risk" students. - gscherbeck</p> <p><u>Mission Statement</u> Mission statement wording is somewhat redundant (academic development...academically...at-risk for academic failure). - sherryreeves</p> <p><u>Educational Need and Targeted Student Population</u> Although the need for better educational options was clearly explained, does the education plan appear too similar to any LEA without much innovation to address the challenges outlines? - nacharles</p> <p><u>Educational Need and Targeted Student Population</u> The application states that a specific student population will not be targeted. The evidence of educational need is attached and provides some data points for the proposed region however many of the links included are not entirely applicable. Also, the 34% of parents who cited interest in a charter school does not appear to be a significant figure. The applicant does not fully explain how its education plan will be drastically different or better than other school options. - gscherbeck</p>

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	<p><u>Educational Need and Targeted Student Population</u> Attached for review purposes is a map outlining the current charter schools. Additionally, the map provides an overview of the general placement of proposed charter schools for the 2018 school year: <a href="http://www.dpi.state.nc.us/charterschools/schools/map">http://www.dpi.state.nc.us/charterschools/schools/map</a>. - dtsmith840</p> <p><u>Educational Need and Targeted Student Population</u> Statement about no target population seems to conflict with stated mission.School mission specifically states that at-risk students will be targeted but statement from applicant regarding targeted population is that there is no target population. - sherryreeves</p> <p><u>Purposes of Proposed Charter School</u> What metrics will be used to measure success beyond state standards? - nacharles</p> <p><u>Purposes of Proposed Charter School</u> Previous accomplishments are cited however the applicant does not clearly describe how the proposed charter school will achieve one more legislative purposes. Identified purposes do not provide clear metrics or expected outcomes for students and staff. - gscherbeck</p> <p><u>Purposes of Proposed Charter School</u> I garner concerns on Legislative Purpose #6: this answer seems vague, at best; it does not fully outline any true innovative approaches to teaching methods, and outlines only how administration and coaching plays a big role in this setting. - mycah068</p> <p><u>Goals for the Proposed Charter School</u> Are monthly reports as detailed as proposed an attainable goal? - nacharles</p> <p><u>Goals for the Proposed Charter School</u> Performance goals are mentioned however a clear and specific process to measure those goals are not included. Further, the stated goals are not reflective of high student and staff expectations. Many simply seek to meet state expectations. Lastly, goals should never be "minimum standards". - gscherbeck</p>
<p><b>Education Plan</b></p>	<p><u>Instructional Program</u> Can documented evidence for improved outcomes be cited beyond NHA schools for this target population?</p> <p>What approach will be used for high achieving students?</p> <p>- nacharles</p> <p><u>Instructional Program</u> Instructional methods are provided however lack specifics and a coherent description about how they will be leveraged. The applicant does not clearly provide documented evidence that the proposed approach will lead to high levels fo student achievement. - gscherbeck</p> <p><u>Instructional Program</u> I do not see the documented evidence regarding the proposed approach; other than the quote from Marzano. - mycah068</p>

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	<p><u>Instructional Program</u> Applicant speaks of using effective, research-based instructional strategies but there is no specificity. The same applies to the formative assessment process and college-readiness assessment. - sherryreeves</p> <p><u>Curriculum and Instructional Design</u> How will you attract and retain qualified teachers based on the extended hours/days on the calendar? Will teachers be compensated? - brian_smith2</p> <p><u>Curriculum and Instructional Design</u> Applicant needs to clarify the systematic intervention program: Is this part of the Regularly scheduled school day? Is it additional after/before school time?  Applicant needs to clarify: Aside from the 13 days at the beginning of the school year, is 5 Professional Development days throughout the year enough to provide teachers with adequate support? - kzparker718</p> <p><u>Curriculum and Instructional Design</u> Is the class size in each grade suitable for the outlined differentiated, individualized instruction outlined in the design?  What are the details of the moral focus curriculum?  How much instruction time will be required to allow for the assessments proposed in addition to the state exams?  Is there staff dedicated to the high school admission process?  Is NHA data applicable for the proposed population or do NHA partner schools serve different populations?  How does the school day structure support the needs of likely students and families?  Where are the additional instructional hours built in?  How will high achieving students be engaged academically outside of the classroom given that summer learning loss can occur for all students? The targeted program appears to be for academic support - nacharles</p> <p><u>Curriculum and Instructional Design</u> Appendix C is attached but lacks details. Appendix B is attached but was last updated in 2014 and appears to be a generic curriculum outline. An average class of 28 students for one teacher is a high-ratio and does not appear to be a better ratio than local district options. It is unclear how the provided curriculum tools were chosen. - gschermebeck</p> <p><u>Curriculum and Instructional Design</u> Classroom size is large especially since applicant states that the majority of students will enter the school with academic deficits. Will there be a teacher assistant in every classroom? Applicant states that there will be an extended school day and extra hours of instruction</p>
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	<p>but the details state the instructional day will be 6.5 hours. That is the normal school day for the majority of schools. Where is the extra instructional time? - sherryreeves</p> <p><u>Special Programs and "At-Risk" Students</u> RTI is now MTSS. What is the "certain score" to determine which students will need further academic interventions? - sherryreeves</p> <p><u>Exceptional Children – Identification and Records</u> Parents/guardians will be asked if their child/children received special education services upon entry at High Point. Is this after the lottery process has been conducted? - brian_smith2</p> <p><u>Exceptional Children – Education Programming</u> Additional details should be included regarding the school's plan to fully serve exceptional children. - gscherbeck</p> <p><u>Student Performance Standards</u> What will occur in the first two years on state assessments? - brian_smith2</p> <p><u>Student Performance Standards</u> Will evaluation tools be used for all grades or just those listed for assessment (k-1,3, and 8)?</p> <p>Is there an opportunity to describe the promotion standards in more detail? - nacharles</p> <p><u>Student Performance Standards</u> The applicant must provide rationale for the lack of rigorous goals for their students. These goals to not set a high standard for student performance. The applicant provides assessment tools yet does not specifically provide benchmarks or related data goals that should be met throughout the school year. - gscherbeck</p> <p><u>Student Conduct and Discipline</u> What is the actual six level, school-wide system that may result in suspension? What are the grievance procedures? - brian_smith2</p> <p><u>Student Conduct and Discipline</u> Student conduct is mentioned but incredibly limited. The applicant could provide much more detail regarding students conduct and culture. Particularly, the plan should be differentiated for the different grade levels the school proposes to serve. - gscherbeck</p>
<p><b>Governance and Capacity</b></p>	<p><u>Tax-Exempt Status 501 (c)(3)</u> Is there an effort to secure tax-exempt status prior to school opening? - nacharles</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Given the importance of parental involvement to HPCA, is mailing board meeting info enough? Is there more opportunity for families to engage with the board?</p> <p>How are board members evaluated?</p> <p>What evidence, beyond the short narrative, exists outlining how board members contribute to school governance?</p>

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	<p>- nacharles</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Appendix G &amp; F do not appear to be attached. The applicant should provide more information regarding evaluation of the governing board outside of the three primary goals that are listed. - gschermebeck</p> <p><u>Proposed Management Organization (EMO/CMO)</u> Is there a distinction between NHA and the principal? Both have been cited as deciding promotion, graduation, and disciplinary decisions and protocols. - nacharles</p> <p><u>Proposed Management Organization (EMO/CMO)</u> The applicant provides a rationale for partnering with NHA however the specifics of the for-profit partnership should be explained. Given the high limits of certain budget items, NHA should specifically explain how they profit from this partnership and the profit margins they plan to collect. The applicant should also explain why the high price of these budget items (curriculum, texts, etc) are worth tax payers money compared to other viable, reasonably priced options. - gschermebeck</p> <p><u>Charter School Replication</u> Stating higher growth / achievement rates compared to the local LEA is not specific. Data points should be provided to understand if NHA's previous performance is strong rationale to open another school. - gschermebeck</p> <p><u>Charter School Replication</u> Did not see a copy of Appendix N. Information related to the rationale and detailed info of the financial performance are absent. Academic performance was present. - mycah068</p> <p><u>Staffing Plans, Hiring, and Management</u> Applicant needs to clarify: The role of the Principal is outlined as an instructional leader. What position will handle the day to day operations of the school? - kzparker718</p> <p><u>Staffing Plans, Hiring, and Management</u> What is the salary range for non-teaching and other staff? How will staff be retained? Who is included in the other employee category? How will part-time employment or contract needs be addressed? - nacharles</p> <p><u>Staffing Plans, Hiring, and Management</u> The applicant does not provide enough information to ensure the recruitment and retainment of high-performing staff. This is especially true for a school that plans to hire 50+ FTEs. - gschermebeck</p> <p><u>Staffing Plans, Hiring, and Management</u> No information provided on the retention of staff members in first question. - mycah068</p> <p><u>Staff Evaluation and Professional Development</u> Applicant needs to clarify: As outlined earlier in the application, you anticipate a large number of students who will be "at risk"- what specific training will teachers be given in this area? - kzparker718</p> <p><u>Staff Evaluation and Professional Development</u></p>
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	<p>How is the "total rewards" compensation with performance-based raises budgeted for? - nacharles</p> <p><u>Staff Evaluation and Professional Development</u> The applicant provides generic statements regarding staff evaluation and professional development. The applicant also does not specifically address how data will be leverage in accordance with staff evaluation and professional development. - gscherbeck</p> <p><u>Marketing Plan</u> The applicant does not provide ample details for the recruitment and marketing plan. For a proposed school at this size, additional specifics should be provided regarding how student enrollment and staff recruitment will be met. - gscherbeck</p> <p><u>Parent and Community Involvement</u> The applicant does not provide sufficient information regarding a communication plan to serve a school at the proposed size. - gscherbeck</p> <p><u>Admissions Policy</u> How is "eligible" defined in terms of the admission process? - nacharles</p> <p><u>Projected Student Enrollment (Table)</u> Why was the decision made to add the fifth grade and double the projected enrollment from last year? Is the need in the area higher since last year? - brian_smith2</p> <p><u>Projected Student Enrollment (Table)</u> What are the LEA projections based on? Will numbers be shifted to other LEAs should the seats not be filled? - nacharles</p> <p><u>Projected Student Enrollment (Table)</u> The applicant does not provide a realistic project enrollment for year 1 or corresponding years for the school. - gscherbeck</p> <p><u>Weighted Lottery</u> The applicant is not planning to use a weighted lottery. - nacharles</p> <p><u>Weighted Lottery</u> The applicant should provide additional information regarding underlying research, pedagogical, educational, psychometric and legal support for the planned lottery. - gscherbeck</p> <p><u>Weighted Lottery</u> No weighted lottery is offered. - mycah068</p> <p><u>Weighted Lottery</u> N/A - dswalker</p>
<p><b>Operations</b></p>	<p><u>Transportation Plan</u> Most at risk students do not have access to the internet, how will "ride finder" benefit these students? - brian_smith2</p> <p><u>Transportation Plan</u> "RideFinder" and suggested carpooling does not appear to be viable carpooling options</p>

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	<p>that will suffice for 500+ students in the opening year of a school. Related, \$10,000 does not appear to be enough for transportation budget. Lastly, the transportation plan does not provide a thorough explanation to ensure that all students will have access to the school. - gschermbek</p> <p><u>Transportation Plan</u> Does RideFinder work in schools with a large number of low wealth students who may experience issues with their cars or may not have them?</p> <p>Is \$10,000 enough to cover transportations needs given the population the school anticipates serving?</p> <p>At what grade does public transportation become a realistic option for students and how accessible will the school be to public transit? - nacharles</p> <p><u>Transportation Plan</u> Will not offering a bus transportation plan be a barrier to students who cannot participate in a shared ride program? Also the budget for transportation is only \$10,000 for the year- this seems incredibly low. - sherryreeves</p> <p><u>Civil Liability and Insurance</u> Total cost for insurance seems low. - sherryreeves</p> <p><u>Facility and Facility Contingency Plan</u> A detailed contingency plan is not included in this plan. Given that NHA is a for-profit educational company, it should be further explained how the "multi-million investment" from NHA will be paid back. - gschermbek</p> <p><u>Facility and Facility Contingency Plan</u> How will NHA recuperate the money invested (per pupil over time)?</p> <p>Where will cafeteria functions occur? - nacharles</p>
<p><b>Financial Plan</b></p>	<p><u>Budget Revenue Projections from Each LEA (Table)</u> Revenues do not appear realistic given the high-number of students slated for the first year of the school. A more detailed student enrollment plan should be included. - gschermbek</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Revenue projections are not realistic given the high-number of students slated for the first year of the school. Given that NHA is a for-profit management company, the applicant should further explain the revenue assurance arrangement in full details. The \$2,114,556 of "Other Funds" should be fully explained in great detail. - gschermbek</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Other funds provided by NHA? - sherryreeves</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> What is the rationale for fractions of positions in school personnel? Why will the electives/specialty teacher earn less than she or he would as an entry level teacher at a North Carolina public school? - brian_smith2</p>

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	<p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u>          \$95,000+ seems rather high for a Principal during the first year of a charter school.          The applicant does not provide a realistic budgetary projection.          - gscherbeck</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u>          Does include FLSA (non-exempt overtime) considerations?           How will the board ensure quality service for support area while paying aides less \$20,000 and no benefits? - nacharles</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u>          Salary is low for intervention paraprofessionals and EC aides. - sherryreeves</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u>          What is "other" in the other category paying for? - brian_smith2</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u>          \$10,000 is not a realistic budget for transportation.          \$124,300 seems like a high for custodial services.          \$194,200 seems high for maintenance and the large drop in this budget item over the 5 year period should also be explained.          \$260,000 seems incredibly high for curriculum / textbooks. This should be justified and explained in great detail.          Many of these budget items seem unjustified and should be explained in great detail.          - gscherbeck</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u>          Are the transportation and child nutrition budgets adequate given the large number of students anticipated? - nacharles</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u>          Facility lease equals more than \$100K per month. Totals for maintenance and custodial contract also seem quite high. Marketing is \$88,800 in year 1 and decreases a little over next 4 years but is still \$65,000 in year 5. Why so high?          Transportation and contracted services are too low.          Why is there a cost for facility acquisition if there are monthly mortgage/lease costs? - sherryreeves</p> <p><u>Total Expenditure Projections (Table)</u>          \$0 Surplus for all five years does not ensure the school will be financially viable. - gscherbeck</p> <p><u>Total Expenditure Projections (Table)</u>          No surplus in budget. Does NHA get all funds? - sherryreeves</p> <p><u>Total Expenditure Projections (Table)</u>          NHA partner school - no surplus. - dswalker</p> <p><u>Budget Narrative</u>          The applicant provides no data that support that 500+ students will enroll in their first year.          The applicant does not describe a solid financial contingency plan. A \$0 Surplus is</p>
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	<p>projected. - gscherbeck</p> <p><u>Budget Narrative</u> The school is relying heavily on NHA for funding outside of the per pupil funding, have any other funds been identified? - nacharles</p> <p><u>Budget Narrative</u> No break even number is given; board is relying on NHA to make necessary adjustments if anticipated enrollment is not met. - sherryreeves</p> <p><u>Financial Audits</u> I am rating "Pass" on the overall budget even though I have noted some serious concerns with the budget. - sherryreeves</p>
<p><b>OVERALL</b></p>	<p><u>Cover Page</u> If High Point Charter Academy Inc. is the non-profit, will the 501(c)3 be obtained prior to opening? - nacharles</p> <p><u>Cover Page</u> The relationship with NHA should be fully explained. Given that NHA is a for-profit management organization, great detail should be paid to their financial and academic motives. - gscherbeck</p> <p><u>Cover Page</u> Several evaluators are questioning why the board is doubling the size of the school in this application as compared to last year's application. With the assistance of NHA High Point Charter Academy will likely meet anticipated enrollment numbers. - sherryreeves</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Why was the decision made to add the fifth grade and double the projected enrollment from last year? Is the need in the area higher since last year? - brian_smith2</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Applicant Needs to Clarify: 1. The total enrollment has doubled in this application compared to last year? Last year total enrollment through the 5th year was 320, this application states a total enrollment of 720 in the fifth year. Why was this decision made? - kzparker718</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Although the enrollment figures are tactical with grades growing each year, are they overly ambitious given the proposed population? High need population need careful and deliberate service delivery, is this accounted for in the enrollment data? - nacharles</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Total projected enrollment of 500+ students in an opening year is high. These figures are not tactical and realistic in the proposed region. - gscherbeck</p>

**Charter School Advisory Board Subcommittee**

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<b>Mission, Purposes, and Goals</b>	
<b>Education Plan</b>	
<b>Governance and Capacity</b>	
<b>Operations</b>	
<b>Financial Plan</b>	
<b>OVERALL</b>	

### Overall Summary

<b>Initial Screening 09/30/2016</b>	<p>The Office of Charter Schools deemed this application complete on September 30, 2016. No further information is needed for the application evaluation.</p>
<b>Application Review</b>	<p>OCS provided a brief overview of the proposed application including the enrollment over five (5) years, proposed county, and mission of the proposed school. Each respective board member and two (2) representatives from National Heritage Academies (NHA) were present for the application review, discussion, and clarification opportunity.</p> <p>The Policy Committee (PC) discussed each major section for the proposed application and specifically detailed improvements from the application submitted last year. Additionally, the CSAB commended the group for partnering with an EMO.</p> <p>Mr. Walker pointed to the diversity of the board of directors. Specifically, the strength of the High Point Charter Academy group is its proposed board of directors. Mr. Helton outlined the group partnering with NHA provides the needed support for this diverse group. Overall the application makes more sense. Ms. Reeves discussed that operationally, the transportation plan may need further development so that it is not a potential barrier for enrollment based on the targeted student population.</p> <p>The PC discussed the external evaluator concerns in the financial section with the zero dollar surplus detailing it is common for an NHA school to have a zero dollar surplus as NHA provides the needed support to its partner schools. Ms. Reeves directed the committees attention to her questions detailed in the evaluation rubric and stated the questions could be addressed during an interview.</p> <p>Mr. Walker opened the floor for representatives from the school to clarify its proposed transportation plan. Ms. Torrence detailed they are partnering with NHA and relying on their expertise to ensure there is no barrier regarding transportation. The board is seeking to modify its transportation plan to serve the targeted student population for this proposed</p>

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	<p>school. NHA is willing to provide a contribution to increase the transportation budget if needed.</p> <p>Ms. Reeves made a motion to forward to the full board to interview. Mr. Helton seconded. The committee motion passed unanimously.</p> <p>Mr. Walker made a motion to the CSAB for High Point Charter Academy to receive an interview with the full CSAB. Ms. Parl recused. Ms. Reeves seconded. The motion passed unanimously.</p>
<b>Application Interview</b>	
<b>OVERALL</b>	Applicant group withdrew from the process on December 5, 2016.