

Legacy STEEL Academy - Our mission is to produce highly literate students able to face challenges, build their communities, and apply technology through rigorous standards utilizing the STEEL platform so that they might create a lasting legacy of success.



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:

Eric Sanchez
Alex Quigley
Joe Maimone
Jessica Kelly
Walter Finnigan
Glenn Allen
Cheryl Turner
Alan Hawkes
Shaunda Cooper
Jennifer Gnann
Deanna Townsend-Smith
Robert McQuat
Shannon Sellers
Mike McLaughlin
Hilda Parlér

Date of Review:

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09/30/2016

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NORTH CAROLINA CHARTER SCHOOL APPLICATION

Legacy STEEL 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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AGREEMENT PAGE

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Total External Evaluator Votes 72

Total Subcommittee Votes 72

CSAB Votes 72

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I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Legacy STEEL 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: Legacy Academy

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

Name of contact person: Dr. Angel Thurston

Title/Relationship to nonprofit: Chief Visionary Founder

Mailing address: PO Box 914
Reidsville NC 27323

Primary telephone: 336-587-4497 Alternative telephone: 336-587-4497

E-Mail address: angelthurston75@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. EdisonLearning, 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.

Legacy Academy members completed the application; however, EdisonLearning provided the data and information that is relevant to their management company services outlined in the agreement.

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

No:

Yes:

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

No:

Yes:

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*

Legacy Academy will offer a unique STEEL curriculum centered on science, technology, engineering, entrepreneurship and leadership. Currently, no STEEL-focused schools operate in Guilford County.

According to the 2010 Census, "Greensboro experienced the slowest growth rate for the decade of the largest ten municipalities in the state: 20.4 percent compared to 46.3 percent in Raleigh and 35.4 percent in Charlotte." This is largely due to rapid business and industry growth in Charlotte and the Triangle. For Guilford County's continued growth, industry is strongly needed. Legacy Academy will educate and build future business owners who will have the mindset of creating industry in Greensboro and surrounding areas.

A location with no charter schools, population growth, and highway accessibility, are all factors in choosing a location for Legacy Academy. Guilford County currently has eleven charter schools in the area but none are located in northeast Guilford. Placing a charter school in this area will help families by providing an alternative education choice to the traditional public school in their district. Population growth is another key factor in selecting a site location. Northeast Guilford County is experiencing tremendous growth with the addition of large developments.

<http://www.census.gov/2010census/popmap/ipmtext.php?fl=37:37081>

<http://www.greensboro-nc.gov/modules/showdocument.aspx?documentid=13601>

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

Legacy Academy will partner with Guilford Community College and Alamance Community College to offer GED and high school diploma classes, as well as technical training in certain fields, if desired. Legacy Academy will also have partnerships with Randolph County Community College's Adult Education and Certification programs.

*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:

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What is the name of the nonprofit organization that governs this charter school? Legacy Academy
Is this application for Virtual charter school: Yes: No: X

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2017 Month August

Will this school operate on a year round schedule?

No: X

Yes:

Proposed Grade Levels Served and Total Student Enrollment (5

Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
First Year	06,07,08,09,10	425
Second Year	06,07,08,09,10,11	500
Third Year	06,07,08,09,10,11,12	575
Fourth Year	06,07,08,09,10,11,12	575
Fifth Year	06,07,08,09,10,11,12	575

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.

thursta
Signature

Dr. Angel L. Thurston
Title

thursta
Printed Name

09/16/2016
Date

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Section I: Application Contact Information Concerns and Additional Questions	Reviewer	Page Reference
<u>You say a site is needed where there are no charter schools, but then say there are 11 in Guilford County; why is there a need for acceleration in Guilford County?</u> <u>Do you have documentation for the partnerships with the various community colleges?</u> <u>The results of the Survey in Appendix A were not available. Is there data that is missing?</u>	<u>Shannon Sellers</u>	<u>Acceleration</u>
<u>Expand upon need. If there is a current lack of industry in the area and the county has currently 11 charters, what evidence is there for acceleration?</u>	<u>Jennifer Gnann</u>	<u>Acceleration</u>
<u>Are you able to provide evidence based off of your survey results in Appendix A?</u>	<u>Jessica Kelly</u>	<u>Acceleration</u>
<u>Appendix A requires a partnership from a four or two year institution in higher education. Is this partnership an established partnership? If established what are the details of the programs offered.</u>	<u>Walter Finnigan</u>	<u>Acceleration</u>
<u>You have attached a survey as (appendix A1). Do you have data that captures the finding of the survey?</u> <u>Your application states that you will partner with higher education institutions. Have partnerships been established and agreed upon between agencies mentioned, pending the approval of the application/school?</u>	<u>Shaunda Cooper</u>	<u>Acceleration</u>
<u>What evidence do you have that the number of students can be achieved?</u>	<u>Jennifer Gnann</u>	<u>Grade Levels</u>
<u>There is a lack of depth in the research to support this many students starting on year 1.</u>	<u>Alex Quigley</u>	<u>Grade Levels</u>
<u>What data supports the projected enrollment numbers?</u>	<u>Shannon Sellers</u>	<u>Grade Levels</u>
<u>Concern: No clear relationship with a college or university is establish or proven. There is no documentation that demonstrates or provides proof for this to be an accelerated process.</u>	<u>Walter Finnigan</u>	<u>Grade Levels</u>
<u>Your projected enrollment is 425. Does your survey data support this level of participation in your school's program?</u>	<u>Shaunda Cooper</u>	<u>Grade Levels</u>

Reviewer	Score
<u>Eric Sanchez</u>	
<u>Alex Quigley</u>	<u>Fail</u>
<u>Joe Maimone</u>	
<u>Jessica Kelly</u>	<u>Pass</u>
<u>Walter Finnigan</u>	<u>Fail</u>
<u>Glenn Allen</u>	
<u>Cheryl Turner</u>	
<u>Alan Hawkes</u>	
<u>Shaunda Cooper</u>	<u>Fail</u>
<u>Jennifer Gnann</u>	<u>Fail</u>
<u>Deanna Townsend-Smith</u>	
<u>Robert McQuat</u>	
<u>Shannon Sellers</u>	<u>Fail</u>
<u>Mike McLaughlin</u>	
<u>Hilda Parlér</u>	

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II. MISSION and PURPOSES

(No more than three total pages in this section)

Mission:

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

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

Our mission is to produce highly literate students able to face challenges, build their communities, and apply technology through rigorous standards utilizing the STEEL platform so that they might create a lasting legacy of success.

Clearly describe the mission of the proposed charter school:

Legacy Academy is a STEEL (Science, Technology, Engineering, Entrepreneurship, Leadership) school, dedicated to building tomorrow's leaders, with rigorous academics, student actualization, entrepreneurial opportunities and community involvement. We envision youth leaders that are able to utilize knowledge and technology to positively impact their communities, generate innovative ideas, create new markets, and grow in independence. Our STEEL platform is unique and is a pathway to student success.

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

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

The school's targeted population will reflect Guilford County's diverse population. The demographic makeup of Guilford County in Northern Guilford is 48.4% White, 40.6% Black or African American, 7.5% Hispanic 4.0% Asian American, 0.5% Native American, 0.1% Native Hawaiian or Other Pacific Islander, 2.08% some other race, and 2.6% two or more races. According to the 2010 Census, "Greensboro experienced the slowest growth rate for the decade of the largest ten municipalities in the state: 20.4 percent compared to 46.3 percent in Raleigh and 35.4 percent in Charlotte." This is largely due to rapid business and industry growth in Charlotte and the Triangle. For Guilford County's continued growth, industry is strongly needed. Legacy Academy will educate and build future business owners who will have the mindset of creating industry in Greensboro and surrounding areas.

A location with no charter schools, population growth, and highway accessibility, are all factors in choosing a location for Legacy Academy. Guilford County currently has eleven charter schools in the area but none are located in northeast Guilford. Placing a charter school in this area will help families by providing an alternative education choice to the

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traditional public school in their district. Population growth is another key factor in selecting a site location. Northeast Guilford County is experiencing tremendous growth with the addition of large developments. Lastly, highway 29 runs through all of northeast Guilford. The highway will allow convenience for commuters who are traveling daily.

<http://www.census.gov/2010census/popmap/ipmtext.php?fl=37:37081>

<http://www.greensboro-nc.gov/modules/showdocument.aspx?documentid=13601>

- 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).*

Our projections for the first year indicate an estimated 18% decrease in student population from the 1 middle school and 1 high school in the area, of which, both have a combined enrollment of 2,444 students. With this projected enrollment, Legacy STEEL Academy is projecting an initial enrollment for AY1 between 450-480 students from the Northern Guilford part of Greensboro, NC.

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

Legacy Academy will offer a unique STEEL curriculum focused on science, technology, engineering, entrepreneurship and leadership. Currently, no STEEL-focused schools operate in Guilford County. Aligning to our mission, the school will provide a rigorous academic and moral education. There will be a focus on creating and building community, entrepreneurship and leadership for all students. Legacy Academy students will understand their role and their responsibility to create a community where quality education is accessible to everyone. Legacy students will make thoughtful, informed decisions throughout their lives. Upon graduation, Legacy Academy students will be successful in obtaining secondary training at a community college/trade school or university of their choice. This is accomplished with a curriculum that embraces environmental sustainability, technology as a learning tool, and analytical inquiry in an environment where learning will result in success.

- 4. In the appendices (Appendix A1), you must provide evidence through a narrative or visual of this educational need through survey data, or times and locations of public meetings discussing this proposed charter school. (Please do not provide more than one sample survey form).*

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

The Six Legislative Purposes of a Charter School are:

- 1. Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site.*
- 2. Hold schools accountable for meeting measurable student achievement results.*
- 3. Provide parents and students with expanded choices in the types of educational opportunities*

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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.*

Legislative Purpose 3. Provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system.

The Four Pillars of Legacy STEEL Academy are as follows:

- Actualization and Accountability
- Leadership
- Community Involvement
- Entrepreneurship

Legacy Academy supports 21st Century Learning concepts through its unique STEEL (Science, Technology, Engineering, Entrepreneurship, and Leadership) model. Each grade level has a yearlong focus on one of the four pillars. The students North Carolina College Preparatory Academics are bolstered by curriculum designed around the incorporation of the four foundational pillars, the integration of the STEEL Program, and a literacy-based instructional framework. The marriage of the Four Pillars, STEEL focus, and literacy support practices manifests themselves in the following ways:

On a monthly basis, content area experts in the Leader Speakers Program come into the school to speak to the students about their educational and career experiences. These are community leaders who support the STEEL curriculum from the firsthand, real-world perspective.

Character Education is integrated in each classroom and throughout the building. This provides a foundation that encourages respectful behavior and supports a positive learning environment. The students at Legacy Academy are encouraged to reflect a pattern of professional behavior wherever they are.

Students demonstrate the fidelity of the STEEL curriculum and literacy proficiency through student portfolios. In the end-of-year grade level symposiums, students present their reflections and hallmark assignments to parents, educators, and community members. This event is unlike any other scholarly event offered in the schools in Eastern Guilford County.

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.*

In order to ensure efficiency within school operations, academics, finance, and governance, The Legacy Academy Board will work in collaboration with the EMO, Edison Learning, and a subcommittee appointed by a partnership of the

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Executive Leadership Team and EdisonLearning Executives to review the following each month:

* Operations: Reports will be submitted utilizing EdisonLearning forms, and presented to the board and subcommittee via the Operations Manager on a monthly basis. (Goal: To maintain compliance and operate a program that is within code expectations of all state, local, and federal agencies that mandate policies regarding building and school operations.)

* Academics: The Principal will submit bi-weekly common assessment scores and quarterly benchmark assessments each month to the board and subcommittee for review each month along with an intervention plan or remediation outline accompanied by a Strategic Growth Plan which details student projected growth. The Principal will receive feedback and resources to support in implementing plans, and will maintain an online shared folder that is utilized for Progress and Monitoring. Teachers will be included in assessments and the data collection and reporting process, as well as plans for remediation. Parents and students will receive bi-weekly score reports along with bi-weekly progress reports via PowerSchool and printed progress reports every 3.5 weeks. (Goal: To remain in compliance with state and federal mandates, and exceed state, local, and federal education institutions growth in all tested areas by 20% the first year and 40% by the 5th year of operation utilizing our STEEL model and to create new industries of employment that generate income for community members.)

* Finance: The Operations Manager will work in conjunction with the EdisonLearning Finance team and EdisonLearning Site Coordinator to ensure efficacy of funds and records. Quarterly board and subcommittee reviews will be conducted and discussed in detail to maintain compliance. All transactions will take place utilizing an online record keeping process via ConceptSIS so that all orders can be viewed and approved by the necessary parties. (Goal: Across the 5 years to maintain efficient records that are in compliance of all regulations required by the state of North Carolina and the EMO).

* Governance: The Executive Leadership Team, Educators, and the EMO will partner to create a monthly electronic newsletter where all stakeholders can view the progress of the school in regards to all areas of academics and operations. Monthly goals will be set by the learning community to increase proficiency, finance, and academic growth. Governance will be maintained by including parent and student electives in the School Improvement and School Assistance teams so that each facet of the school is maintained at a level of excellence. (Goal: To increase overall buy-in and growth by including all stakeholders in the governance process with anticipated goal of 80% stakeholder participation by year 5).

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

The governing board will know that the proposed public charter school is working toward attaining our mission statement by evaluating the following indicators:

* Parent, Student, and Teacher Surveys that are completed each quarter.

* Parent, Teacher, Student Association: Meetings each quarter and minutes will be read at board meetings.

* Increased Stakeholder Participation: Records of events, activities, and participation will be maintained by the Community Involvement Coordinator.

* Academic Assessments: Student growth on benchmarks and common core

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assessments.

* Attendance and Suspension Records: Increased attendance and low incident reports from PRIDE.

* New Industry: The amount of new business created in the community by student entrepreneurs.

* EMO Reports: Reports generated by the EMO that indicate growth.

* PowerSchool Reports: PMR, Promotion and Retention Records.

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Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
What challenges are referred to in the mission?	Shannon Sellers	Mission Stat
Define Challenges. The mission statement needs to define the organization.	Walter Finnigan	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: http://www.dpi.state.nc.us/charterschools/schools/map .	Deanna Townsend-Smith	Educational
There is no clear rationale for the projected enrollment. Appendix A1 does not contain data. What evidence is there that a STEEL focused school is needed?	Shannon Sellers	Educational
Projected enrollment of 425 students for year 1 has no data to support the need for the charter school. Is there data to support the survey in Appendix A? What makes a STEEL curriculum different from a Guilford County curriculum and why would parents select the STEEL curriculum instead of the Guilford County curriculum?	Walter Finnigan	Educational
What information can you provide that would support your explanation for the evidence of need?	Shaunda Cooper	Educational
For projected enrollment you state there will be an 18% decrease in student population from local schools; with your first year projection grades 6-10 is this accurate. How did you predict these numbers?	Jessica Kelly	Educational
There is no alignment to the 4 pillars in the mission. Have you already connected with the Leaders that support the school and will come present to the students?	Shannon Sellers	Purposes of
The applicant states they have leader speakers who support the school and are willing to speak to the students as part of the four pillars of legacy who are those individuals and what are the roles in the community?	Walter Finnigan	Purposes of
Expand upon the academic goals of the students.	Jennifer Gnann	Goals for th
What does PRIDE stand for and where is that indicated?	Jessica Kelly	Goals for th
Goals are vague. How do the goals align to the mission only testing is specifically mentioned? Goals need to be expanded on in all areas.	Shannon Sellers	Goals for th
The goals for the proposed charter school are to be written as specific and measurable goals for the first five years of operation. Concern: Goals are very broad, need to focus on each area within the stated goal.	Walter Finnigan	Goals for th

Reviewer	Score
Alex Quigley	Fail
Hilda Parlér	
Jessica Kelly	Pass
Glenn Allen	
Shaunda Cooper	Pass
Jennifer Gnann	Fail
Robert McQuat	
Eric Sanchez	
Walter Finnigan	Fail
Alan Hawkes	
Shannon Sellers	Fail
Cheryl Turner	
Joe Maimone	
Deanna Townsend-Smith	
Mike McLaughlin	

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III. EDUCATION PLAN

(No more than ten total pages in this section)

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

Instructional Program:

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

For the instructional program, Legacy Academy will utilize Project-Based Learning (PBL) with Authentic Project Assignments to teach the foundation and principles of operating a business within the industries that utilize science and technology, and to be innovative leaders with upstanding moral aptitude who possess the business acumen and literacy expertise to open, operate, and grow new business within the community. PBL will enable students to make real world connections with academic concepts and content supported by literacy, and create and participate in authentic project assignments which mirror local community issues and needs. PBL is a model that encourages collaboration, requires a reflective thinking process, provides a learning platform where students are more engaged and have ownership in education, empowers them to become independent thinkers, and increases overall mastery of academic content and skills. The involvement of real-life application and real-world objects in interdisciplinary science projects produces considerably improved learner experience and frequently results in increased motivation even in heterogeneous groups involving low-achieving students. Paired with Authentic Project Assignments, PBL increases student and stakeholder engagement and outlines a clear criterion for student academic success and mastery of skills within the North Carolina Common Core and Essential Standards. At Legacy Academy growth, mastery of skill sets and standards, and overall content comprehension and application will be assessed in a non-traditional method as outlined within Problem-Based Learning with Authentic Project Assignments and Universal Design for Learning. Within these two models, whole group instruction and summative assessments are substituted with individualized learning practices, formative assessments which are more diagnostic and provided students and educators with an in-depth analysis of student needs and equips educators with the data they need to continue setting goals within the UDL design model and upcoming PBL project. Students at Legacy Academy will receive one test project every two weeks. The test projects will be aligned with the North Carolina Common Core and Essential Standards for each content area as well as the Legacy Academy Pacing Guides and Scope and Sequence adopted from the Winston Salem Forsyth and Guilford County School districts, and will serve as project completion check points for the PBL Project and presentation at the end of each quarter. Students will build and complete test projects and compile them together as culminating projects to be present at the quarterly PBL Community Fair. Students will be provided with a Common Core Rubric prior to each test project which outlines a clear criterion for academic success for project completion across the content. Upon completion of the test project, students will receive a rubric score

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with feedback from each educator. Scores will be utilized to determine skill set comprehension along with formative assessments of skills embedded within the bi-weekly project and skill preparation to complete the test project. Completion of test projects, the PBL Project Presentation, and formative assessments will create a learning environment where all stakeholders are responsible for learning and growth, and will provide students with the opportunity to demonstrate mastery prior to the end of the semester. In addition to our education and instructional plan, Legacy Academy will also incorporate the Edison Learning Five Strand Design, to evaluate the effectiveness of the design implementation. The Five Strand Design when utilized with fidelity is a powerful tool to ensure schools are high performing in the following five areas, Leadership, Pedagogy and Curriculum, Assessment for Learning, Learning Environment, and Student and Family Support Systems. Please see Appendix O, Additional Forms by Applicant for a full overview of the Five Strand Design.

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.

The basic learning environment at Legacy Academy is an innovative, student-centered classroom. Our students are in the middle grade span and will be involved in service learning, experiential and project-based learning with traditional discussion based inquiry, while fostering the development of community. The classroom will also consist of blended learning and project-based learning components. Significant content consists of three elements: driving question, in-depth inquiry and public audience. It will focus on teaching subject-based knowledge and skills. 21st-century skills include: the need to know, student voice and choice, revision and reflection, skills which facilitate critical thinking, problem solving, collaboration and cooperation, and communication. The student/teacher ratio is 25:1.

Each grade level will be charged with the responsibility to not only become master learners, but to also be better community members and leaders through the integration of their core values system. Their core values system is established off of the Four Pillars: Self-Actualization (6th grade), Community Involvement (7th grade), Entrepreneurship (8th grade), and Leadership (All grade levels).

Provide a synopsis of the planned curriculum, including:

- 1. One sample curriculum outline (in graph form) in the Appendices (Appendix B) for one core subject (specific to the school's purpose) for each grade span (i.e. elementary, middle, high) the school would ultimately serve.*
- 2. If you are proposing a high school, as Appendix B2, provide a visual disseminating what courses (core content and electives) will be offered at the charter high school to ensure students meet the proposed charter school's graduation requirements. Please ensure the projected staff and budget aligns with the course offerings.*
- 3. Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model.*

Within the foundation of our charter we have established that our five

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principles of learning Science, Technology, Engineering, Entrepreneurship, and Leadership will be the building blocks and keys to academic success across content areas in our school program. Our mission and core principles will be supported by literacy across the curriculum and will increase in rigor as our targeted students matriculate throughout the program while keeping alignment with the North Carolina Accountability Model. Curricula for each grade and subject area, administrators and teachers will adhere to North Carolina's Core Content Curriculum Standards.

- 4. Describe the primary instructional strategies that the school will expect teachers to master and explain why these strategies will result in increased academic achievement for the targeted student population for each grade span (i.e. elementary, middle, high) the school would ultimately serve.*

Legacy Academy will provide students and educators with the opportunity and resources to become master teachers and learners who address learning styles and growth models through mastery of skill sets within the North Carolina Common Core and Essential Standards through the use of the three principles of Universal Design for Learning: Multiple Means of Representation, Multiple Means of Action, and Multiple Means of Engagement.

The goal for educators at Legacy Academy is to produce curricula that provides a 21st Century approach with a Problem-Based Learning model with STEEL principles. As well, to introduce a framework that is flexible and meets the needs of all learners, and as noted by CAST (2011) to create a scientifically valid framework for guiding educational practice that provides flexibility in the ways information is presented, in the ways students respond or demonstrate knowledge and skills, and in the ways students are engaged; and reduces barriers in instruction, provides appropriate accommodations, supports, and challenges, and maintains high achievement expectations for all students, including students with disabilities and students who are limited English proficient. The UDL model will be used simultaneously with Project-Based Learning to enhance student learning, engagement, and growth for all students across content areas as educators and students collaborate to create common alignment and assessments to increase mastery.

- 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.*

Each grade level will be charged with the responsibility to not only become master learners, but to also be better community members and leaders through the integration of our core values system. Our core value system is established off of four pillars: Self-Actualization (6th grade), Community Involvement (7th grade), Entrepreneurship (8th grade), and Leadership (All grade levels).

A new pillar will be introduced to students as they transition through our program with a review of the prior year pillar as a building block to success for the current and preceding year. Students who enter the program after a pillar has been laid, will receive foundation work in our Skill Setting Program as part of the program awareness and development needed to be productive people in our learning community.

- 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*

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how grade-point averages will be calculated?

Not applicable. Legacy STEEL Academy is a 6-8 charter school and will ultimately serve the students in this grade span with plans to add 11th and 12th grades in Years 2 and 3.

7. *Provide a school academic calendar in Appendix C (minimum of 185 instructional days or 1,025 hours).*

8. *Describe in a brief narrative below on how the calendar coincides with the tenets of the proposed mission and education plan.*

Legacy Academy will provide a school academic calendar (minimum of 180 instructional days or 1,025 hours) Legacy Academy school calendar will align with the Guilford County School calendar, however we will have an extended school day and a 4-day school week (Monday-Thursday). Our school year will operate on a 9-week quarter basis, two quarters per semester. Fridays will be teacher training and parent conference days as well as time for personalized learning. Bi-weekly on Fridays Legacy will offer a parent Academy for parents who need assistance with their educational goals as well as giving them the tools needed to help with their students academic goals. At the end of each quarter there is a scheduled teacher's workday. Mid-quarter progress reports are sent home at 4 1/2 weeks.

Works Cited for Educational Plan and Curriculum and Instructional Design:
Holme, M. (2011). PROJECT-BASED INSTRUCTION: A Review of the Literature on Effectiveness in Prekindergarten through 12th Grade Classrooms. InSight: RIVIER ACADEMIC JOURNAL, VOLUME 7, NUMBER 2.
Competency Works. Retrieved on June 21, 2016 from <http://www.competencyworks.org/>
Southern Education Regional Board. Instructional Strategies Motivate and Engage Students in Deeper Learning.

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.*

For management services, EdisonLearning will assist Legacy Academy teachers in professional development and implement a Response to Intervention (RtI) program in accordance with North Carolina state regulations. RtI is a multi-tiered intervention strategy process to enable early identification, prevention, and intervention for students who are not performing at their expected level. RtI allows educators to identify and address academic and behavioral difficulties prior to student failure. Monitoring student response to a series of increasingly intense intervention strategies aids in preventing failure and also provides data that may guide eligibility decisions for recognizing learning disabilities.

Readily available school data on attendance, GPA, credits, course failures, and behavior will be analyzed after each grading period by teacher teams to determine the effectiveness of core academic and behavioral programs and to identify students who demonstrate behaviors that are highly correlated with dropping out of school. Additionally, benchmark assessment data will be collected throughout the school year and used by teacher teams to determine proficiency on end-of-year standards. Core instructional interventions as well as individual student interventions will be designed and implemented

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Accordingly. Along with the monthly benchmark assessment data, teacher teams will have the data from the tiered interventions to ensure progress and academic growth.

Tier I support is provided in a standards-based classroom and consists of flexible grouping for differentiation, strategic use of technology and on-line learning, and universal screening throughout the school year. The effectiveness of the core academic program will be reviewed at least three times during the year and interventions will be designed and implemented by grade-level teacher teams. Grade-level teacher teams will design, implement, and monitor targeted interventions for students who need instructional and/or behavioral support in addition to the core programs. Examples of these Tier II supports are social skill groups, small group instruction on previously taught standards, and computer-based reading and/or math intervention programs.

Legacy Academy teachers will provide more intensive and individualized problem-solving support for students who do not respond favorably to Tier II interventions. A school-based team will analyze academic and behavioral performance and conduct diagnostic assessments to design an individualized intervention for the few students who require this level of support to make academic and/or behavioral progress. Students receiving this level of support will still have access to the core instructional program but may also require curricular and instructional resources that will allow for a more narrow and personalized focus of instruction. A multidisciplinary problem-solving team will drive the support process for these students. A referral for special education services may be required for a small number of students who require the resources of special education (e.g., individual learning goals, specially-designed instruction, accommodations, related services, etc.) to access their educational program.

Legacy Academy will also have P.R.I.D.E. (Promoting, Respect, Integrity, Discipline, and Excellence) Institute. This is an in-school educational center where students receive enhanced discipline skills to help them remain competitive and refocus their energy to become successful in the classroom. The Institute has a referral program which is a partnership between academia and discipline within Legacy Academy.

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.*

Legacy Academy will provide the following services for ELL learners within our program:

* A structured English immersion methodology emerged in word acquisition modeled after the SIOP instructional model. This model is an inclusion model that is proven to increase speaking, listening, writing, reading, and overall comprehension for ELL and struggling learners in core academic areas. The framework is supported by supplemental resources, planning

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guides, and professional development.

* Language and comprehension assessments administered upon enrollment and through a Home Language Survey for students who are not born in native English speaking countries or do not speak English in the home. The survey will be utilized to measure the amount of language support needed for success in our academic program model.

* Once the level of support is assessed students will be then partnered with an ESL Specialist who will work in collaboration with ELA and core educators to develop a language enriched program through immersion and inclusion. Local and state assessments will provide incremental data to drive overall instruction.

* Students will participate in an active language lab to increase language phonetic and comprehension mastery. An online tracking method for success and growth will be maintained in the lab with online assessments to monitor growth according to the NC English Language Proficiency Standards.

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.*

Legacy Academy will serve Academically gifted (AG) students. These students will be offered tiered and differentiated learning activities within the classroom setting, which is designed to grow and develop their academic interests. These students will also be served during the enrichment activities that will be offered at Legacy Academy.

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)*

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Legacy Academy will work with Guilford County School district to identify the special needs of students and to meet all applicable state and federal requirements including Individuals with Disabilities Education Act (IDEA), G.S. 115C-238.29F(g)(5), and Section 504 of the Rehabilitation Act. Exceptional students with disabilities, regardless of the nature or severity of their disability, who need special education and services, will be served in the least restrictive environment possible. During on-site parent/teacher conference, the parent/guardian or caregiver may request to review and have a copy of the student's records and any witness statements, with other student names and information redacted.

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.*

Legacy Academy will provide: speech-language pathology and audiology services, psychological services, physical and occupational therapy, therapeutic recreation, orientation and mobility services, diagnostic and/or evaluative medical services and student and/or parent counseling in addition to any other services necessary for the success of our students. Our implementation of the inclusion model will allow us to serve the needs of all students, including those students classified as special education, in the least restrictive environment. At our school, full inclusion of special education students means the delivery of services in the general classroom. Special education students, when appropriate, will receive their adapted curriculum work, and other therapies such as speech-language therapy and occupational therapy, within a general education classroom. Special educators and therapists will come to the general education classroom, when appropriate and in accordance with the student IEP, to provide services to small groups of special education students in ratios dictated by student IEP. If inclusion is not an appropriate setting for the student, the school will provide a program appropriate to meet the needs within the continuum of placement options. Those students whose needs are so unique or severe that the need cannot be addressed at the school, the student will be appropriately referred to another educational setting. Legacy Academy will work together with Guilford County School Board to ensure that the need of all exceptional students are met. An Individualized Educational Program (IEP) will be developed for every enrolled student requiring or receiving exceptional educational service. The IEP will be utilized to provide services addressing the individual needs of exceptional students. Those who qualify for exceptional student services will be placed in various programs according to their needs. Legacy Academy will obtain informed parental consent for conducting an evaluation to determine eligibility for exceptional education student needs. We will ensure that one or both parents of a student are members of any group that makes decisions in the educational placement of their child immediately following the development of the IEP and without undue delay. Legacy Academy will provide the parent with a copy of the proposed IEP and the notice of procedural safeguards and

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parents' handbook of rights. The student will have access to the general curriculum and specialized materials and equipment will be provided as specified in IEP. Students with disabilities, even if expelled, must be provided with a Free and Appropriate Public Education (FAPE). Exceptional students with disabilities, regardless of the nature or severity of their disability, who need special education and services, will be served in the least restrictive environment possible. A full continuum of delivery models will be available for exceptional students including physical, occupational, and speech/language therapy. Legacy Academy is committed to providing an inclusive education for all students. Our school will contract with the necessary agencies to provide related services for students with identified needs. To address these needs, the school will hire three (3) full-time special education coordinator/teachers and a social worker, implement an inclusion program, practice differentiated instruction, and partner with service providers.

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.*

Legacy Academy is committed to students achieving personal growth, acquiring excellent social skills, and setting high and achievable performance goals for them to excel in their future. The goal for Legacy Academy is to improve student achievement, foster a safe and nurturing school climate, and help bridge communication between students, faculty, and parents. To assist with these goals, Legacy Academy will offer a variety of counseling programs and initiatives for students and parents:

Individual Academic Counseling-

All students are required to meet with the guidance counselor every semester to create and review the students four year academic plan and support the student from one grade level to the next. The intent of the four year plan is to ensure students are taking the courses needed for college readiness and high school graduation. The high school guidance counselor provides individual or group assistance with educational planning and career exploration:

- * 9th -12th grade pre-registration information such as course selection
- * Review graduation requirements
- * Included is a review of the number and types of credits needed for graduation. Students meet at least once per year to work on their four year academic plan
- * College and Career days
- * High School On Line Programs
- * Dual Credit Programs
- * Individual Education Plans

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- * Student and parent conferences to address educational and career planning
- * Student, teacher and parent conferences regarding student grades/failure
- * 10th -12th grade conferences to review student graduation status and to interpret the standardized test scores from High School Proficiencies Examination and review college/post-secondary, scholarship, financial aid and career information.
- * 9th 12th grade review Four Year Plans

Social/Emotional Counseling-

Legacy Academy is committed to developing interpersonal skills by instilling:

- * Character development
- * Decision-making
- * Developmental assets
- * Goal setting
- * Education in understanding of self, including strengths and weaknesses
- * Conflict management
- * Social issues
- * Violence and drug abuse issues
- * Cyber Bullying issues
- * Counselors also provide consultation services to parents and teachers. In addition, counselors may refer students (and when needed, their families) to other outside programs/agencies for other resources or services such as;

Post-Secondary Planning-

Legacy Academics counseling staff will offer personalized support for college and career exploration, goal setting and achievement for life post-graduation.

- * Postsecondary planning and application process
- * Career awareness and the world of work
- * Internships
- * Career planning
- * College and career fairs
- * Volunteer Opportunities
- * Partnerships with community businesses
- * Teacher/Student Mentoring Programs
- * Advisement on Career Exploration

At Legacy Academy, academic growth, mastery of skill sets and standards, and overall content comprehension and application will be assessed in a non-traditional method as outlined within Project-Based Learning with Authentic Project Assignments and Universal Design for Learning. As mentioned, within these two models, whole group instruction and summative assessments are substituted with individualized learning practices, formative assessments which are more diagnostic and provided students and educators with an in-depth analysis of student needs and equips educators with the data they need to continue setting goals within the UDL design model and upcoming PBL project (please see Instructional Program section). The STEEL model and core principles of UDL will drive instruction as educators move forward with instruction of the NC Common Core and Essential Standards. As well, teachers at Legacy Academy will assess student growth via Competency Based Grading which can be viewed at <http://www.competencyworks.org/analysis/what-is-the-difference-between-standards-based-grading/>

Each grade level will be charged with the responsibility to not only become

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master learners, but to also be better community members and leaders through the integration of our core values system. Our core value system is established off of four pillars: Self-Actualization (6th grade), Community Involvement (7th grade), Entrepreneurship (8th grade), and Leadership (All grade levels).

A new pillar will be introduced to students as they transition through our program with a review of the prior year pillar as a building block to success for the current and preceding year. Students who enter the program after a pillar has been laid, will receive foundation work in our Skill Setting Program as part of the program awareness and development needed to be productive people in our learning community.

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.*

Legacy Academy students and their families will receive a copy of the school's Code of Conduct and Parent/Student Handbook.

1. Principals, teachers, and other school professionals hold high expectations for students learning and behavior. Adults in schools help students achieve personal and academic success using a range of responses. Classroom management strategies may include the following:

- * Acquire a student's attention by calling his/her name in a calm voice.
- * Address the student privately.
- * State the problem behavior.
- * State expected behavior and explain why the student needs to satisfy the expectation.
- * Listen to the student's response and help student to recognize appropriate behaviors for him/herself.
- * Indicate the specific consequence of continuing to engage in the problem behavior--and the positive consequences of good behavior.
- * Ask the student to demonstrate the expected behavior.
- * Acknowledge the student (i.e., thanks, praise, reward, etc.) for listening to you and/or exhibiting the appropriate behavior.
- * Document the infraction on a discipline referral report.

School interventions may include the following:

- * Create a Student Behavior Contract
- * Before or after school detention
- * Alternative volunteer service (e.g., soup kitchens, shelters)

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- * Cafeteria duty
- * Community Conferencing/Restorative Justice
- * Guidance/Counselor referral
- * In-school work detail
- * Lunch detention
- * Parent shadowing
- * Peer mediation
- * Reflective essay
- * Independent study
- * Student/teacher/parent conference
- * Daily reports/self-charting
- * Restorative practices
- * Response to P.R.I.D.E. Intervention and Instruction Tier II action plan

2.Examples of Offenses-Truancy/Excessive tardiness/Cutting class, Possession of inappropriate personal items, Profane or obscene language or gestures, Aggravated, Robbery, Possession of drugs and alcohol, Possession of a weapon, etc.

3. Legacy Academy can only suspend students identified as Intellectually Disabled with either written agreement of the parent/guardian or the written approval of the NC Charter School Organization. Legacy Academy may suspend students with disabilities and cease educational services for up to five consecutive school days or 15 cumulative school days in one school year without providing special education procedural safeguards.

4.All students are to be treated with fairness and respect. Students have a right to be heard and are to be provided the opportunity to explain their version of events to administrators.

1.Notification of the charges in writing by certified mail to the students parent/guardian.

2. At least three days notice of the time and place of the hearing, which shall include a copy of this policy, hearing procedures, and notice of the right to representation by legal counsel. A student may request the rescheduling of the hearing when he/she demonstrates good cause for an extension.

3. The hearing shall be private unless the student or parent/guardian requests a public hearing.

4. Representation by counsel at the parents/guardians expense and parent/guardian may attend the hearing.

5. Disclosure of the names of witnesses against the student and copies of their written statements or affidavits.

6. The right to request that witnesses against the student appear in person and answer questions or be cross-examined.

7. The right to testify, make arguments and present witnesses on the students behalf.

8. A written or audio record shall be kept of the hearing and a copy made available to the student at the students expense, or at no charge if the student is indigent.

9. The hearing shall be held within 15 school days of the notice of charges, unless a delay is mutually agreed to by both parties...

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Section III: Education Plan Concerns and Additional Questions		
The instructional program appears to be PBL, but there is no mention of STEEL to support the mission. How is STEEL going to be incorporated in the instructional program?	Shannon Sellers	Instructiona
Why does the instructional calendar not have any key to ask playing what is on the actual calendar? This calendar does not coincide with the proposed mission and educational plan. Appendix B is only for grade 6 which does not reflect all grades. Will the applicant be providing any other classes other than those offered online with edisonlearning? Difficult to understand from the appendices and the written narrative.	Walter Finnigan	Curriculum a
High School school course catalog does not appear to be aligned to the NC courses of Math I, Math II. The curriculum map is just a list of the standards by unit and lacks depth.	Alex Quigley	Curriculum a
Is the instructional program PBL or Blended Learning or both? Only PBL is discussed in the instructional programming. Only middle school is mentioned for the basic learning environment, what about the high school? The projected grade span for the school is grades 6-8, but your projected numbers show high school. This seems to be contradictory. With a 4 day week, what will be the school hours and how will this calendar align with the LEA's calendar? Will this meet the required instructional time? Appendix B and B2 along with the narrative are confusing. Exactly what grade levels will be served? At different points in the application it says 6-8, but projected numbers include grades 9 - 12.	Shannon Sellers	Curriculum a
The grade span shows high school. Why is a high school curriculum not fully discussed? How does ecourses fit with PBL? Is your instructional model PBL or blended learning? How will the students have enough instructional time with only a 4 day week? How long will the school day be?	Jennifer Gnann	Curriculum a
Curriculum outline in appendix is only from 6th grade; do you have this for all grade levels you are planning on opening with in first year? With a 4 day school week; how will you meet state requirements for hours of instruction? How will this school calendar work with other local schools/	Jessica Kelly	Curriculum a
Expand upon how AG students will receive specialized instruction.	Jennifer Gnann	Special Prog
Where will the funding come from to ensure these specific populations needs are met? Once students are enrolled will these needs for these specific populations be readdressed based on student population?	Jessica Kelly	Special Prog
When will members of the team on tier 1 support group meet and what is the criteria that would cause a student to be targeted?	Walter Finnigan	Special Prog
How will academically gifted students be identified? How will you differentiate instruction for AG students? How will you monitor ELL student progress?	Shannon Sellers	Special Prog
In the Special Programs and "At-Risk" section of the application, you state that Edison Learning will assist Legacy with multi-tiered intervention strategies. Where in this section do you address students who currently have IEPs (Individualized Educational Plans)? Who will handle IEPs and ensuring that services for these students are met?	Shaunda Cooper	Special Prog
What is your process for identification of students with disabilities as they enter your school? What is your Child Find Process? How will you maintain record confidentiality and compliance?	Glenn Allen	Exceptional
The applicant makes no mention of working with other counties being a charter school and with the proposed location of the school it is highly likely they will have students from other counties besides Guilford County. The applicant also fails to answer question three on properly managing records.	Walter Finnigan	Exceptional
How will you identify Exceptional Children that are not currently being served? How will you request records?	Shannon Sellers	Exceptional
It is stated that Legacy will work with Guilford County Schools to obtain records of Exceptional Children. As a public charter, you may receive students from outside of	Shaunda Cooper	Exceptional

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Guilford County. Are you prepared to communicate with other counties as well for student record purposes?		
How will you obtain records? How will you utilize ChildFind? How will you identify students for services that are not currently being served as EC?	Jennifer Gnann	Exceptional
The applicant states that if the needs of a child are so unique that the school cannot meet the needs, they will be referred to another educational placement. How is this implementing a full range of programs? The applicant needs to expand its understanding of an IEP team. The plan for providing and serving exceptional children is not clear.	Shannon Sellers	Exceptional
Plan reflects that Legacy will work with Guilford County Schools Board to ensure the needs of exceptional students are met. Plan does not reflect how Legacy will provide the full continuum of services.	Glenn Allen	Exceptional
Expand upon your understanding of how to serve students with severe needs within your school. Expand upon your understanding of an IEP team.	Jennifer Gnann	Exceptional
Expand upon your goals as listed in Mission, Purpose, and Goals section. How will students be promoted? What assessment tool will be utilized? How will data drive instruction?	Jennifer Gnann	Student Perf
What specific assessments will be used to help drive student instruction.	Walter Finnigan	Student Perf
Policies for promotion are unclear. Student performance goals are unclear or nonexistent in this section. What assessments will be used? What data will be used to drive instruction?	Shannon Sellers	Student Perf
What assessment tools will be utilized by this school for student performance as well as staff evaluations?	Jessica Kelly	Student Perf
What is your policy and standards for promoting students with disabilities?	Glenn Allen	Student Perf
Expand upon your understanding of suspension for students with Intellectual Disabilities. What about students with other disabilities?	Jennifer Gnann	Student Cond
Applicant needs to refer to existing policies and practices. Appears to be lack of understanding of how policies currently are implemented in the state.	Alex Quigley	Student Cond
How will the principles teachers and other school professionals be trained to hold high expectations for student learning and behavior. Creating a school culture like this requires professional development and materials. This professional development is not planned in the application.	Walter Finnigan	Student Cond
In the example section #2, one of the examples reads "Aggravated". Is that a complete phrase used to describe the infraction? Will you include each of these possible discipline strategies in your parent and student handbook? Example (In school work detail).	Shaunda Cooper	Student Cond
The plan for suspension of exceptional children is incorrect and violates federal law.	Shannon Sellers	Student Cond
"Legacy Academy can only suspend students identified as Intellectually Disabled with either written agreement of the parent/guardian or the written approval of the NC Charter School Organization. Legacy Academy may suspend students with disabilities and cease educational services for up to five consecutive schools days or 15 cumulative school days in one school year without providing special education procedural safeguards"--this does not comply with Policies Governing Services for Students with Disabilities.	Glenn Allen	Student Cond

Reviewer	Score
Deanna Townsend-Smith	
Joe Maimone	
Cheryl Turner	
Shannon Sellers	Fail
Alan Hawkes	
Walter Finnigan	Fail
Eric Sanchez	Fail
Mike McLaughlin	
Robert McOuat	
Jennifer Gnann	Fail
Shaunda Cooper	Pass
Glenn Allen	

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Jessica Kelly	Pass
Hilda Parlér	
Alex Quigley	Fail

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IV. GOVERNANCE and CAPACITY

(No more than ten total pages in this section)

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

Governance:

Private Nonprofit Corporation:

*The nonprofit corporation must be officially authorized by the NC Secretary of State upon application submission.

Name of Private Nonprofit: Legacy Academy

Mailing Address: PO Box 914

City/State/Zip: Reidsville NC 27323

Street Address:

Phone: 336-587-4497

Fax: 336-394-4094

Name of registered agent and address: Angel L. Thurston, PO Box 914 Reidsville, NC 27323

FEDERAL TAX ID: 00-0000000

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 professional licenses?
John	Direct	FORSYTH	Engineer/		

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Davenport	or		Business Owner Davenport Engineering		
Bryle Hatch	Treasurer	GUILFORD	Director of Workforce Readiness		
Michael Terry	Director	GUILFORD	GPD Detective		
Larry Adams	Director	GUILFORD	Counselor Guilford County Schools		
Lloyd Middleton	Vice Chairperson	GUILFORD	Admissions Counselor/ Academic Advisor Strayer Uni		
Education Collective	Chairperson	GUILFORD	School Administrators/Teachers Guilford County		
Michelle Hines	Secretary	GUILFORD	Retired US Army		

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.

Legacy Academy Charter School will be governed by a board of directors numbering from 7-11 with elected officers consisting of chairperson, vice-chairperson, secretary, and treasurer. The role of the Board of Directors includes:

- *Determining the operating and educational program policies that result in academic success and are consistent with the school's mission and vision.
- *Overseeing the fiscal operation of the school, eliminating risk, and ensuring prudent financial management.
- *Ensuring that the charter school fulfills its charter agreement with the state and follows all applicable regulations.
- *Overseeing fundraising and procuring donated resources from the community.
- * Supervising and evaluating the School Director.
- *Acting as employer to all staff.
- *Developing strategic plans for the school's future.
- *Completing an annual self- assessment of the board's performance.

The day to day operation of the school will be delegated to an Executive Board; Dr. Angel L Thurston, Dr. DeShaunda Hampton, and Devyn Cannon who is

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hired by Legacy Academy and evaluated by the Board of Directors, and who is an ex officio non-voting member of the Board of Directors. The Executive Board are the only employees directly supervised by the board. Legacy Academy will recruit and appoint the Executive Board through traditional recruiting methods. The individuals must possess strong leadership skills and charismatic energy. They must also be respectful of individual differences, and through implementation and ongoing management, be able to see the school's vision through. A criminal background check in accordance with G.S. 115C-238.29K and North Carolina State Board of Education Policy TCS-U-002 will be conducted for the Executive Board and will be completed by Legacy Academy prior to final approval of the applicant for the position. An Executive Board member will attend monthly board meetings to provide data and feedback on the operations of the school, and to receive direction and feedback from the board. The Executive Board will deliver a monthly report at each regularly scheduled board meeting. This will include key indicators of academic progress and success, financial and operational data, and other items requested by the board or deemed relevant by The Executive Board. The board will conduct an evaluation of the Executive Boards performance and will complete this assessment in April of each year. The evaluation instruments utilized will include the North Carolina School Executive Evaluation for Principals. The board will also solicit feedback and input from parents, teachers, and students about the school's performance, the Board of Director's performance, and the Executive Boards role through a survey process will occur at different times throughout the year.

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

The current board of seven (7) brings experience necessary to guide Legacy Academy success. Founding board members include:

- * Teachers with extensive classroom and school leadership experience members of the local business community who want to improve their community.
- * Parents interested in creating an educational option consistent with Legacy Academy mission.
- * Business people with experience preparing and reviewing budgets, balance sheets, and general ledger reports.
- * Business people with experience hiring and managing human resources.
- * Individuals with previous board experience.
- * Individuals with interest and experience in sustainability.
- * Individuals with experience in the service industry.
- * Individuals with experience in the mental health industry.
- * Individuals with experience in workforce readiness and career pathways.
- * Individuals with experience in adult education.

There is still a need to recruit individuals with legal and accounting expertise and the board is pursuing potential candidates in these fields. Duties and powers of the board are discussed in the Bylaws excerpted below:

- Specifically, the duties of the Board of Directors shall include, but shall not be limited to the following:
- a. Perform any and all duties imposed on them collectively or individually by law, by the articles of incorporation, or these bylaws;
 - b. Meet at such times and places as required by these bylaws;

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c. Register their addresses, telephone numbers, and email addresses with the secretary of the corporation, and notices of meetings delivered by these means shall be valid notices thereof;

d. Appoint, remove, and supervise all officers of the corporation;

e. Appoint and remove, employ and discharge, and except as otherwise provided Legacy Academy in these bylaws, prescribe the duties and fix the compensation of the Executive Board who shall serve as an ex officio non-voting member of the Board of Directors;

f. Establish governance policies that uphold North Carolina Public Charter School law and promote the mission and goals of the school;

g. Recommend priorities and short-term and long-term plans to the Executive Board;

h. Build and maintain partnerships with all community stakeholders and assume a leading role in promotion of and fundraising for the school. The activities and affairs of this corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the Board of Directors. The board acts as one unit and all matters of the corporation are determined by resolution according to the bylaws. No individual Director may speak or act for the corporation without authorization. The board, except as otherwise provided in the bylaws, may by resolution authorize any officer or agent of the corporation to enter into any contract or execute and deliver any instrument in the name of and on behalf of the corporation, and such authority may be general or confined to specific instances. Unless authorized, no officer, agent, or employee shall have any power or authority to bind the corporation by any contract or engagement, or to pledge its credit or to render it liable monetarily for any purpose or in any amount. The board's diverse experience and skill set will be a valuable asset in evaluating the success of the Executive Board in the following areas:

- * Meeting goals for academic growth and student social, physical, and emotional development.

- * Contributing to the community in relevant ways that have a positive impact on students and families, the community, and the environment.

- * Management of the school's finances.

- * Implementation of employment policies.

- * Implementation of practices that further the school's mission.

- * Meeting student, parent, and staff expectations. In addition to the board's varied expertise and experience, the school structure allows for input from all stakeholders through four advisory committees of teachers, students, parents, and community members.

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?

An initial group consisting of teachers, parents, and community members was organized by a local educator, Angel L Thurston. Weekly meetings were held to explore the need for and feasibility of opening a new charter school as well as to develop the mission and vision for the school. This group identified possible founding board candidates from within the group and from within the community. People known to members of the original group were then approached to determine their level of interest in becoming a board member. A potential board member information packet was developed and distributed to candidates at an informational seminar held in the community about the role and commitment required of Legacy Academy board members. When a candidate expressed interest they were screened by the founding members at separate meetings, and those who possessed the experience, expertise, and

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commitment needed to create a well-rounded board were invited to become a founding board member. The current seven-member board recognizes that there is still a need to recruit individuals with legal and accounting expertise, and would like to fill these roles as soon as possible. Additional board members, including parents and local community leaders, will be added if they would enhance the board's role. If a position becomes vacant, the board will recruit a replacement based upon the current needs and composition of the remaining members. If a vacancy leads to board membership dropping below the minimum number of five, the board will find a replacement within 30 days: Directors shall hold office for a period of two (2) years and until his or her successor assumes office. Directors may hold office for a maximum of two (2) successive terms with each new term requiring a majority vote of the Board of Directors. Directors may hold office for a period of less than two (2) years in order to implement staggered and transitional terms.

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

The board meets the first and third Fridays of each month to discuss the following: operations, finance, academics, partnerships, and stakeholder participation. Each year the schools legal counsel and/or other appropriate officers or experts will conduct professional development workshops that help support Legacy's operational success.

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.*

The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation. Board training is seen as one of the major keys to the success of Legacy Academy therefore training will begin after an individual has expressed an interest in serving on the board. Orientation to the board prior to being elected as a director consists of two steps:

1. All prospective board members will be sent a copy of the Legacy Academy Board of Directors Orientation Manual along with a letter of invitation to consider becoming a board member.

2. A meeting with key board members will occur to go over the responsibilities and expectations of the Board of Directors and to answer any questions the prospective board member may have. The purpose of these initial steps is to ensure that the individual has a good understanding of the responsibilities a Director accepts upon becoming a board member. After the individual is elected to the board, the new Director will be paired with an existing board member who will act as a mentor during the first year of his or her term. The mentor is responsible for helping the new member with any questions about materials, logistics, or other information related to the board. Board members will be expected to participate in all training deemed critical during the planning year after preliminary approval has been granted. This will include training provided by the state DPI and/or Board of Education relevant to charter schools. The initial board will be responsible for considering and requiring other professional development that may be necessary to ensure the success of the school. This might include training about the legal aspects of running a charter school such as open meetings, minutes of the meetings, finance, State Board of Education directives, education codes, as well as training in the role each board

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member has in their oversight of the school. Board members will be expected to attend trainings in a timely and attentive manner. After the initial school startup period, the Board of Directors will incorporate regular training into their monthly meetings at least once per quarter. During the annual self-review, the board as a whole will identify areas of professional development that would be beneficial to its growth and performance during the upcoming year.

- 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.*

Upon appointment Legacy Academy Board of Directors, directors will sign an agreement to disclose any conflict of interest to the board or board committee. A written disclosure will also be required annually from each board member at the start of the fiscal year. New disclosures that are needed during the course of business during the year will be noted in the minutes of the meeting in which the disclosure was made along with the discussion and results of the decision as to whether a conflict does exist, each member has a duty to disclose any conflict of interest and will be given the opportunity to present all material facts to the non-interested members of the board or board committee. Discussion of and determination of the existence of a conflict will be made without the interested party present. Decisions regarding compensation to an interested party on the board also exclude the interested party from the discussion and voting decision. There are specific in outlining the procedure if a board member neglects to disclose their interest in a matter, and while the interested board member may give explanation as to why they did not disclose, it is up to the board to determine if disciplinary action is required for the Director's failure to report his/her interest. Board members may be removed by action of the Board of Directors.

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

Legacy Academy Board of Directors will form committees and sub-committees to draft school policies, including board policies, employment policies, and student conduct policies. Draft policies will continue to be developed and adopted as we move through the planning year by committees and subcommittees. Legacy Academy Board will create a subcommittee to write, review, and implement all policy. Before implementation, the board members assigned to the committee, including legal counsel will review best practices as well as charter school law. Legacy Academy is working to adopt a complete set of board policies that include personnel, discipline, enrollment, safety, and other pertinent school procedures. These policies provide the school with the critical legal and operational foundation to immediately and proactively promote safe and efficient operations, and reduce legal problems and costs. Legacy Academy Board will establish a culture of strategic planning and compliance. All policies will be reviewed annually and updated based on legal changes, school reform, and needs.

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

Legacy Academy will have a Parent Association which will be created to engage families in school planning, leadership, volunteer opportunities, and community resources that strengthen and support students learning. Through the Parent Association Legacy Academy will institute a Parent Academy where parents will be able to advance their education, with the ability to earn

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certifications from GED to an Associates degree. The Parent Association will assist in the schools various departments and events year-round including after school activities, field trips, Parent Academy classes, ceremonies, enrichment activities, fundraisers, school accountability, mentoring programs, and teacher assistance. All interested parents of Legacy students, community advocates and volunteers are invited to join the Parent Association. The Parent Association will be accountable and report to the Executive Board. Regular meetings to coordinate school calendars and facilitate communication between the parents, community, and school staff will be mandatory.

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

* A grievance / complaint pertaining to any aspect of Legacy Academy operations or practices may be given either verbally or in written format and can be initiated by Parents to Staff, Staff to Parents or Staff to Staff.

* Any written complaint initiated by a parent, may be completed in any written format. The Principal will assume the role of mediator unless directly involved in the grievance / complaint. In such case the mediators role will be taken by the Executive Board.

* The mediator will:

* Investigate all details of the matter, any contributing incidents and other possible causes for the complaint

* Interview staff members and /or witnesses implicated who may have relevant information.

* Create an agenda before calling a joint meeting at which both parties will air their feelings, discuss each partys goal and devise strategies to be put in place with a view to resolving the conflict.

* The mediator will continue to monitor and evaluate the situation to ensure the strategies remain in place.

* A full report of the history of the grievance will be made to the Board of Directors

Legacy Academy promotes team work and mutual respect in the workplace. The Executive Board will discuss possible conflict through professional development training and work with individual staff members to help promote healthy communication and group problem solving to foster a feeling of empowerment.

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

Include in the Appendices:

1. A well-defined organizational chart showing the relationship of the Board of Directors to the parents and staff of the proposed charter school. This chart should also include lines of authority to and from any outside entity that will play a role in managing or supporting the charter school (such as educational service providers, advisory bodies or parent/teacher councils). (Appendix 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

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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: EdisonLearning, Inc.
Address: 185 Hudson Street, Suite 2910
Jersey City NJ 07311
Website: www.edisonlearning.com
Phone Number: 201-630-2719
Contact Person: Emeka Nti, Regional VP of Business Development, E
Fax: 212-937-4624
Email: emeka.nti@edisonlearning.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.*

Legacy STEEL Academy and EdisonLearning represent a collaborative partnership with parents and the community creating a scalable, cost-effective Science, Technology, Engineering, Entrepreneurship, and Leadership (STEEL) program fully-aligned to North Carolina State Standards and National Common Core State Standards. Through this unique collaboration, each student will be encouraged to develop the essential knowledge, social, behavioral, and leadership skills needed to reach his/her full potential and benefit by becoming a successful member in the 21st Century global community. EdisonLearning provides the broadest range of educational services (virtual, alternative education, school management) offered in the industry to more than 150,000 students in 350 schools on 3 continents.

Unlike others in the education management industry, EdisonLearning does not shy away from tough jobs. EdisonLearning serves the most challenging urban schools and districts in the United States. Their outcomes are not solely based on student test scores, but on graduation rates, college acceptances, and meaningful jobs. This is why their organization Mission and Vision accurately reflects the purpose for their expertise and fits the needs of Legacy Academy:

* Mission: To provide education solutions which help our partners eliminate the persistent disparity of academic opportunities and outcomes for students as a result of their socioeconomic circumstances.

* Vision: A world in which every student - regardless of their socioeconomic circumstances - has an opportunity to receive an excellent education and attain the life skills that help them reach their fullest potential and contribute to our global society.

* Values: Every aspect of EdisonLearning is founded on Nine Core Values; Wisdom, Hope, Justice, Respect, Courage, Responsibility, Compassion,

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Integrity, and Resiliency.

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.*

In addition to EdisonLearning, we researched and pursued other EMO/CMO companies: Imagine, Mosaica Education, KIPP, and National Heritage Academy. It is the complete sentiment of the Education Collective, that Legacy Academy would be best serviced by EdisonLearning. They are the only partner that has been consistent with communication, shared their list of services in detail, have created a plan of action to equip and empower Legacy Academy Leaders to be independent after the transition of support, whom have set scheduled meeting times to ensure that our vision, mission, and academic plan mirror state, local, and agency expectations, and whom has created a strategic plan for our program to fully service all stakeholders. Subsequently, in regards to management fees, the budget and cost analysis that was created by the EdisonLearning team clearly outlines the item by item cost, surplus, deficit to be covered by grants, salary schedules, and operational cost inclusive of technology and a growing student academic population. In comparison to the services rendered and the cost, EdisonLearning proves to not only be more effective in practice and operations, but also more cost efficient. As EdisonLearning has proven to have a long list of successful schools that have met and exceeded academic standards in their perspective states, and have maintained financial integrity, Legacy Academy has deemed this EMO/CMO as the company that is our partner in the success of our stakeholders in Greensboro, North Carolina.

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?*

Student Performance and Governance

EdisonLearning is a good fit for Legacy STEEL Academy's targeted student population and both entities believe in the STEEL model and stand behind Legacy Academy's mission and vision for the school. EdisonLearning has an extensive history in managing schools throughout the country and working with many others over the course of the past two decades, including a large number of schools with primarily minority and high percentages of free and reduced lunch populations.

The EdisonLearning Five Strand Design and Core Values consisted of leaders from many different educational sectors, including researchers from the public and private sectors, teachers, superintendents, and curriculum specialists. The team was dedicated to producing a design that would elicit positive results from students, staff, and governing boards in various social environments. In particular, the design team was interested in serving those in communities that traditionally had been least hospitable to academic success. Since 1995, EdisonLearning's management services have proven effective in schools in areas in which poverty is high and students are at a significant disadvantage with respect to their peers.

Financial Data

EdisonLearning has provided direct fiscal oversight and management of school operations to many other schools to ensure its operational model and

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education model are executed with fidelity. None of the schools currently contracting with EdisonLearning for management services are on fiscal probation. The company, school staff and Charter Boards or authorizing authorities (where applicable) work together to ensure the school has adequate cash flow to manage the school operations through expense management and timely funding draw downs.

Highest and Lowest Performing School

Raleigh-Edison Academy in Duluth, MN is EdisonLearning's highest performing school and Theodore Roosevelt Career & Tech Academy (TRCCA) in Gary, IN is the lowest performing school. Please see the data for the Minnesota managed school in Appendix O, Additional Forms by Applicant.

Differences in Overall Achievement

Raleigh-Edison Academy has been a partner with EdisonLearning for about 18 years. Raleigh-Edison Academy implemented the EdisonLearning model and program with continuous achievement and fidelity. However, TRCCA had been an "F" school for about 10 years. The state finally decided to take the school over from the Gary School Corporation (GCSC) and decided to turn the management over to EdisonLearning. EdisonLearning has been running the school for about four years and there has been steady progress. EdisonLearning is continuing to work with the school in order to overcome decades of low achievement.

- 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.*

The governance structure should not be affected at all by EdisonLearning, the EMO. The board will govern the school independently from the EMO by having all powers and authority, as designated in the Charter, for the management of the business, property, and affairs of the School, to do such lawful acts as it deems proper and appropriate to promote the objectives and purposes of the School.

The Board may, by general resolution, delegate to committees of its own number or to officers of the Schools such powers as it may see fit for specified periods of time. The Board, however, will serve primarily a governance function. It is anticipated that the EMO, EdisonLearning, and school leader will have a great deal of input into the work and composition of this committee. The committees main role is to assure that academic excellence is defined, and that the Board approves annual goals to attain academic excellence. However, all employee contracting, background checks, contracting for other services, development of pay scales and discharging policies, development of performance criteria, adherence to all rights, and general school operation will be managed by EdisonLearning.

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

EdisonLearning's Human Resources (HR) department will manage recruitment, selection, hiring and development of the charter school employees. The school benefits from a single point of contact of a professional HR Business Partner (HRBP). The HRBP will work closely with a group of EdisonLearning HR professionals and leaders from functional centers of excellence for all Human Resources services and support. The EdisonLearning HR department has been recruiting and retaining professional instructional and non-instructional staff for charter schools across the country with a

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concentration in more than 15 different states. EdisonLearning is experienced in working with schools that have staffing challenges. All candidates are screened using the EdisonLearning competency-based methodology which facilitates the selection of "highly qualified" staff. A key component of the process includes the appraisal of each candidate's background. Candidates are further assessed for retention-risk and predictability of success by their individual performance and review of their capabilities using the Haberman Star Teacher Pre-Screener. Candidates are interviewed by charter school and EdisonLearning administration will interview the Principal and SOM. The interviewing process includes required demonstration classroom lesson which evaluates the candidate's interaction and interpersonal skills with a sample of the specific student population. EdisonLearning communicates company policy to employees via the issuing and publication of the Employee Handbook. Each new hire will be given an electronic copy of the handbook for required reading and acknowledgement. The employee handbook is published on the EdisonLearning intranet site (The Common) and is prepared to inform new employees of the policies and procedures (open-door policy, complaints, non-retaliation, etc.) of this company and to establish the company's expectations.

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.*

The Board will annually evaluate our Charter School performance against the metrics outlined in the states Ready Accountability Model. The Management Company will be evaluated against the milestones outlined in the school implementation plan or School Development Rubric in Additional Forms by Applicant attachment. As student performance is the primary indicator of school quality, the board will heavily factor student performance metrics as the primary focus of all annually evaluations of the charter schools performance.

EdisonLearning will support Legacy Academy's needs by supplementing the schools core curriculum with their proprietary eCourses curriculum and project-based learning, as well as implementing EdisonLearnings intensive professional development that incorporates the Five Strand Design mentioned earlier in this application. While we hold teachers and leaders to high standards, we will work side-by-side with EdisonLearning to ensure that Legacy Academy teachers and leaders learn the skills and strategies they need to surpass those standards and measurable objectives. EdisonLearning's professional development services are designed to empower teachers and leaders to manage change. At their core are (1) the concept of partnership and full engagement, (2) fidelity to standards and data, (3) job-embedded support, and (4) collaboration through professional learning communities. Using a combination of observation, perception surveys, and achievement data, as well as holding frequent meetings with staff guided by the School Development Rubric, EdisonLearning ensures fidelity to best practice.

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

- 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.*

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Not applicable. EdisonLearning currently does not manage schools in North Carolina.

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

X Not Applicable

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

X Not Applicable

Projected Staff:

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

The below positions are anticipated for Legacy STEEL Academy charter school. This staffing model can also be found in the budget:

Staffing Model:

Chief Visionary / English Department Charter (will teach yr 1- 3)-1.00

Chief Operating Officer/MS Leader (Principal)-1.00

Chief Academic Officer/HS Leader (will teach yr 1-3)-1.00

PRIDE Director - Dean of Students-1.00

[School Programs and Character Development Director (Student and Family)]

Lead School Counselor-1.00

Community Development and Partnership Director (Community outreach)-1.00

EC Director-Special Ed-1.00

Special Ed teachers- 3.00

English Department Chair - same as chief vision

Teachers-17.00

[Teacher Aides]

[Librarian]

Secretary/Receptionist-1.00

Site Operations Manager-1.00

User Support Technician-1.00

Data Owner-1.00

Total: 31

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

The Legacy STEEL Academy Executive Board will incorporate a strategic plan for recruiting and retaining high-performance educators by doing the following:

* Hire local educators who are licensed and highly qualified in their perspective areas to increase overall buy-in within our community. This process will be facilitated by the board and executive leadership teams.

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* Utilize the following means to advertise and recruit quality educators: school website, local radio advertisement, online newspaper ads, online instructional websites/postings such as teacherstoteachers.com, local employment agencies-NC Employment Security Commission, college recruiting events, and local job fair exhibitions.

The collection of applications will be facilitated through an online program for ease and efficiency. The board and executive leadership team will collect the applications and a list of qualified candidates from the application pool to interview. The interview process will be consistent and equitable in order to select qualified candidates as potential educators, and to ensure that the board and executive leadership team eliminate bias by providing each candidate an opportunity to highlight and demonstrate an expert level of knowledge within their content area. The Principal will also be responsible for the evaluation process of educators inclusive of goal setting based on the NC Teacher Evaluation Process/NCEES, progress and monitoring, reporting, and developing plans to support educators in becoming master educators.

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

The relationship that will exist between the charter school employees and the nonprofit board will be a collaborative partnership. The Assistant Principal and educators will be employed by the Board and Legacy Academy, while the Principal will be solely employed by the CMO/EMO, EdisonLearning. This three-fold partnership is designed so that the cost of benefits to educators is affordable and within budget, so that there is academic accountability is maintained with efficacy, and to ensure that the board maintains authority to recruit, hire, and fire educators with due process under the provision of N.C. Gen. Stat. 115C-238.29F(e)(1). This partnership was discussed and reviewed by the Legacy Academy Board, the Executive Leadership Team, and EdisonLearning. The partnership was placed in a signed agreement which was acknowledged with signatures from all parties. The Board will continue to work in partnership with EdisonLearning in a full comprehensive management, and is currently reviewing the handbook to ensure that all stakeholders are protected and held accountable under NC Law 115 C, Article 16.

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

The board's procedures for hiring and dismissing school personnel, including conducting criminal background checks will fall in compliance with the following statute: G.S. 115C-332 which states that charter schools may require criminal background checks of its employees prior to employment. The Legacy Academy Board will conduct FBI criminal background checks and fingerprinting via the local Sheriff and Police Department of which potential employees must consent to, prior to offer letters being submitted. For continuation of employment, upon renewal of each educators professional license, teachers must complete a criminal background check to the board.

After the criminal background check is completed, educators will have a 90 day probationary period to work while under review, mentorship, and coaching of the Principal and Executive Leadership Team. After the 90 day probationary period educators, instructional, will then receive comprehensive quarterly observations as indicators of performance to be

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reviewed by the Principal for continuous employment, at will, for a span of 10 months. Contracts will be renewed yearly, in the spring of each school year. Teachers will be paid across 12 month as certified employees while classified employees must work 12 months to include a 12 month salaried contract. In cases where employees desire to be released from their contracts, the board is requiring that a 30 day notice be submitted to the board and the Principal for approval.

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

The budget outlines the salary range for the school in detail. The school's proposed salary range for teachers and officers is \$40,000 to \$70,000. The School Principal will be employed by EdisonLearning and will have access to EdisonLearnings employee benefits.

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

The procedures for employee grievance and/or termination are as follows: employees who wish to file a grievance must submit the issue in writing to the board with a written summary of actions and proposed outcomes. In regards to termination, the same procedures will be followed. In regards to termination, the board will have 7-14 days to respond with an open hearing and a final decision to solidify termination or rehire based on a 30 probationary period. The board decision must be made in writing, and placed in the local school administrative office and employee file for future reference.

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

In the proposal for the Legacy Academy, educators and administrators will not serve in dual positions. Positions that require dual roles will be compensated with a stipend for additional duties in addition to their regular salaried position. This stipend will be provided by Legacy Academy.

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.

The plans to include qualified educators adequate for the anticipated special needs population, and the means for providing qualified staffing for ELL and gifted students includes the following:

* Advertising for educators certified in Special Education with an emphasis in Cross Categorical and Regular Education. Legacy Academy has secured an instructor with these credentials for grades K-12 who also has classroom and case management experience. Staffing needs will be paired with student needs, restricted by the budget, and the hiring process of additional staffing in these departments will be conducted and reviewed by the Legacy Board, the Principal, and the Executive Leadership team prior to employment offers.

* All issues regarding staffing and budget must be approved by the Board and the Principal, and advised by the EMO and Legacy Subcommittee.

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).

The plans to include qualified educators adequate for the anticipated special needs population, and the means for providing qualified staffing for ELL and gifted students includes the following:

* Advertising for educators certified in Special Education with an emphasis in Cross Categorical and Regular Education. Legacy Academy has secured an instructor with these credentials for grades K-12 who also has classroom and case management experience. Staffing needs will be paired with student

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needs, restricted by the budget, and the hiring process of additional staffing in these departments will be conducted and reviewed by the Legacy Board, the Principal, and the Executive Leadership team prior to employment offers.

* All issues regarding staffing and budget must be approved by the Board and the Principal, and advised by the EMO and Legacy Subcommittee.

Staff Evaluation and Professional Development

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

EdisonLearnings Director of Achievement and Achievement Team will provide professional development regarding the Five Strand Design and Human Resources will maintain teacher licensures.

- 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.*

EdisonLearning prepares teachers on academic and operational components of the Legacy STEEL model. Staff will receive mentoring and training on the population of students who will be served by focusing on how to produce highly literate students, utilizing technology, generating innovative ideas, creating leaders and tackling those life circumstances that offer academic challenges. Edisonlearning will also orient the teachers on the diagnostic assessments, Individualized Education Plan (IEP), project-based learning, curriculum, core values, Four Pillars of STEEL, entrepreneurship and leadership skills. Beyond this initial training, teachers and staff will receive ongoing professional development throughout the school year. Teachers choosing to work in an EdisonLearning partnership school make a commitment to continuous improvement for their students, the school and themselves. All teachers are expected to develop and carry out a personal Professional Growth plan. The goals and the mentoring activities contained in a teachers Professional Growth Plan should support achievement and the schools mission, and also exist to facilitate the teachers own professional growth. Teachers and school leaders will work together, using the EdisonLearning Framework for Learning and Teaching as the basis for identifying growth goals. Each teachers growth plan will be customized to meet his/her needs. In some cases, professional growth may focus on specific skills or areas that will support a teachers ability to do his/her current job better. Or for exemplary teachers, growth may focus on expanding their teaching to a higher level, while gaining skills in peer mentoring and coaching. In other cases, growth may focus on skills to prepare a teacher for additional responsibilities. Based on EdisonLearnings leadership and professional development strands, the Distribution Leadership Model is part of the staff retention plan by providing opportunities for team members to contribute to the culture and decisions that influence student achievement. In addition, EdisonLearning has a framework called T-GROW that details coaching and professional development process for teachers. The model asks 4 leadership questions (What do we want), (What will we do), (What do we know), (What do we believe). Also, salaries will be determined by averaging salaries at other sites in the region to ensure competitive compensation. By offering competitive salaries, the school will be able to attract and retain employees. The teacher performance evaluation process at Legacy STEEL Academy is designed to ensure all teachers understand the expectations for proficient instructional practice and have multiple opportunities throughout

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the school year to receive feedback on their performance to support their continuous improvement. The teacher evaluation process consists of the following components:

- * Review of data to establish baseline for teacher against the EdisonLearning Framework for Learning and Teaching and against the Professional Attributes Rubric
- * Formal and informal classroom observations
- * Informal observations of non-classroom teacher responsibilities
- * A self-evaluation
- * A summative assessment by the Chief Operating Officer (principal)

At the beginning of the school year, each teacher will work with the Chief Operating Officer (COO) to determine where s/he currently fits within the Framework for Learning and Teaching and the Professional Attribute Rubric. With EdisonLearning support, the COO will conduct several observations the first six weeks of school. Based on those observations, the COO will meet with the new teacher and use the data from those classroom visits and informal, non-instructional observations to establish a baseline for highly qualified teachers. EdisonLearning seeks to employ Highly Qualified Teachers as defined by the NCLB law. EdisonLearning require teachers to comply with federal/state licensure and certification requirements.

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

The EdisonLearning Framework for learning and teaching is a set of coherent, research-based components designed to improve classroom practice and student achievement by focusing on the necessary skills that all teachers need to develop to become exemplary practitioners. The framework helps answer the question "How good are opportunities for learning and developing learners?" Structured around planning and assessment processes, pedagogy, the culture and climate of learning, and the foundations of quality teaching, the Framework connects teaching to a set of expected standards, focus teachers on a set of Power Themes that are proven to have the greatest impact on learner outcomes, and extend and refine the practice of proficient teachers. The Framework is designed in a hierarchical structure, building on a teachers commitment and capacity to improve the learners achievements. Depending on each of these factors, teachers focus on one of the three themes that ensure differentiated, individualized support for every instructor. Gateway Themes contain basic teacher competencies and behaviors that teachers must exhibit in order to open the door to learning in their classroom. Teachers evaluated at the Beginning and Developing stage of teaching quality as defined by the framework fall within this theme. Power Themes represent pedagogical levers for increasing student learning. Teachers focus on effective assessment strategies, learner behaviors and enhancing the level of rigor for each student. Teachers evaluated at the Developing and Proficient stage of teaching quality as defined by the framework fall within this theme. Extension Themes extend the capacity of teachers beyond the key levers for learning described in the Power Themes, fostering teacher mentorship and distributed leadership on campus. Teachers evaluated at the Proficient and Exemplary stage of teaching quality as defined by the framework fall within this theme.

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*

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instructional methods.

EdisonLearnings PD is an annual process and there are a variety of vehicles for delivering PD to staff across the EdisonLearning system. The EdisonLearning Leadership Development Academy (ELDA): Annual events (November) are designed to advance the professional development of building principals with the schools Director and Officers, the schools key contacts in the field. These 2-3 day conferences support the continued implementation of the Five Strand Design with increasing fidelity as leaders explore the design in various ways through the leadership framework. Instructional Leadership Conferences: An annual event, generally held in the fall or winter, during which the regional support team tailors a PD agenda designed to support the professional growth and development of the Leadership Team members and instructional leaders throughout the region. These events are supported by the National Team to ensure alignment to the Five Strand Design Scope and Sequence. These events also correlate to the contents covered during the ELDA conferences. PD Modules and resources aligned to the Five Strand Scope and Sequence: A wealth of resources supports the three-phase implementation journey that each of our schools is on. These resources are organized by strand and by quarters, beginning with the induction period, "Quarter 0," and ending with Quarter 12. They are designed to develop capacity in a variety of key competencies for staff ensuring ever-increasing fidelity to the design and improved student achievement outcomes. These modules are delivered by field support staff in the following ways:

- * During Professional Development days;
- * During planning time;
- * During Leadership Team meetings;
- * During before or after school PD sessions;
- * During virtual learning opportunities like webinars or conference calls;

Events can be scheduled based on a schools implementation plan or on demand. All staff members are supported with EdisonLearning PD in the basics of instruction and classroom management and the specifics of implementing the schools core curriculum. Legacy STEEL Academy instructional staff will receive substantial PD support in both the pre-opening phase of its launch and on an ongoing basis to implement all aspects of the EdisonLearning Five Strand Design, the schools mission, Four Pillars of STEEL, curriculum, and academic program. "Quarter 0," is specifically designed to build leadership capacity and instructional proficiencies that promote greater fidelity in design implementation, and to ensure a successful start-up effort. Local PD opportunities are geared towards site-based needs and will draw upon field expertise in the Five Strands that are central to the design. These five interconnected strands represent the essential holistic school design model, incorporating the key research-based ingredients for increased student achievement in high-functioning schools: Leadership, Learning Environment, Assessment for Learning, Pedagogy and Curriculum, and Family and Student Support. Ongoing training in these areas ensure improved student outcomes as site-based personnel become more proficient in the execution of the unique EdisonLearning Five Strand Design. The following list of essential questions illustrates how the Five Strand Design serves as a comprehensive framework:

- * How well is the school set for leading and managing change? (Leadership)
- * How well does the school promote and foster environments that support learning and motivation? (Learning Environment)
- * How good are opportunities for learning and developing learners? (Pedagogy & Curriculum)

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* How well does the school use assessment, data, and feedback to promote learning? (Assessment for Learning)

* How well does the school use its internal and external resources to meet the spectrum of need for all learners? (Student & Family Support)

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

Our school year will operate on a 9-week quarter basis, two quarters per semester. Fridays will be teacher training. However, once specifics are identified during the requirements gathering stage, a comprehensive professional development plan and calendar will be developed by EdisonLearning in collaboration with Legacy STEEL Academy based on an agreed upon implementation schedule. Throughout the initial year of our partnership, follow-up training and professional development will be made available through synchronous or asynchronous sessions.

Please see the EdisonLearning School Implementation Plan in Appendix O, Additional Forms by Applicant and PD days in Appendix C, Instructional Calendar.

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)).

In compliance with G.S.115C-218.45(e) of the North Carolina Charter School Statutes, Article 14A, Charter Schools, Admission Requirements, Legacy STEEL Academy will admit all children who are qualified under the laws of this State for admission to a public school to be qualified for admission to this charter school. Our goal for the school is to seek and enroll a student population that reflects a broad range of ethnic and socioeconomic diversities. We will implement a student outreach strategy to ensure that information about the school gets a wide distribution within the community it will serve.

The school will implement EdisonLearnings enrollment and student recruitment marketing plan leading up to the opening of the school. EdisonLearning will provide strategy, creative services and a full range of marketing recruitment expertise for Legacy STEEL Academy. The Chief Academic Officers and staff will have access to EdisonLearning marketing professionals with extensive expertise promoting enrollment and programs at various types of schoolslocal, district, charter, statewide, and virtual-for grades K-12.

The enrollment and student recruitment marketing plan will be developed collaboratively, driven by target market research, student population,

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racial/ethnic demographics, school contacts, community networking, branding, recommended tactics, marketing budget, and building location. The marketing plan schedule will evolve with predicted enrollment needs, but may include:

- * Strategic enrollment planning meetings; routinely or on a per project or as-needed basis
- * Enrollment Marketing Materials development writing and design of (brochures, flyers, Ads, Scripts, Digital ads, Landing Pages, internet advertising, social media, etc.)
- * Pricing and Creative for advertising placements transit, digital, print, radio, tv, web promotions
- * Email and direct mail list purchases (expensed), based on target demographics
- * Vendor quotes and ordering oversight for materials, giveaways, printing, etc. if desired
- * Enrollment and Retention campaign templates and best practices
- * Raffles and incentive recommendations
- * Event recommendations and guidance

The marketing plan will be customized to meet the needs of the community, the budget, and our goals. In essence, EdisonLearning will work collaboratively with the board members who reside in the community, utilizing their knowledge and relationships in the community to form meaningful partnerships.

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.*

Legacy Academy will send advertisements through social media outlets as well as utilizing the US Postal Service to disperse information about our school's mission and goals. We will also attend various community functions, parades, church services, neighborhood events and scout meetings to introduce The Education Collective group to perspective students in our communities.

We will communicate with parents in a variety of ways. We will update our website weekly with a school newsletter. We will also have a robocall system set up to keep parents abreast on the important events that are happening at the school, ie parent (student led) conferences, parent information and involvement nights, snow days, etc. Administration and teachers will be able to communicate with parents via email and phone.

Parents will be required to volunteer for a certain numbers of hours during the school year. Their volunteer opportunities will include, but not be limited to, assisting the teachers, tutoring, planning and participating in community involvement activities, providing transportation to specific events, helping to monitor student behavior during school-wide events, and contacting and informing other members of the community.

We will partner with parents to provide a well-rounded education for their

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children by equipping parents to participate in this process. We will have information sessions for parents to let them know what is going on in their child's classroom. Each teacher will engage the parents in the learning process by allowing them to experience what their student is being taught. The parents will then be allowed to ask questions for further comprehension so that they will be well equipped to help our children if and when necessary.

We will also partner with parents to become better educated themselves. Sometimes life takes us in a direction that we are not prepared for. We would like to assist parents with meeting their personal goals in life. Legacy Academy will partner with Guilford Community College and Alamance Community College to offer GED and high school diploma classes as well as technical training in certain fields if desired. Legacy Academy will also assist the parents in getting their bachelor's degree.

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.*

Legacy Academy is committed to serving all students who are eligible to attend public school in Guilford County. Our school will comply with all applicable federal and state laws for admissions and enrollment. A demographic survey and letters will be delivered to inform the community about open enrollment. Open enrollment will begin February 2017 and will end April 2017. We will accept applications on a first-come, first-serve basis until capacity is reached. If the number of applications exceeds capacity, a lottery will be held. Students and parents will be notified of acceptance in April of 2017. If there are not enough applicants, there will be no need for a lottery and all students will be accepted.

If a lottery is performed, applicants will be selected randomly. Only applications received prior to the end of the admissions deadline are eligible to participate in the initial lottery. Every applicant will be called until every name has been drawn. When capacity is filled, names will be drawn and placed on a waiting list. Applicants that are offered a seat must respond to the offer within fourteen days. If an offer is declined, the seat will be offered to the first person on the waiting list. Students not selected to receive a seat in the lottery will be placed on a waitlist based on the order of the lottery drawing.

Legacy Academys enrollment preferences will comply with the NC General Statute 115C- 238.29F(g).

(<http://www.ncga.state.nc.us/gascripts/statutes/StatutesTOC.pl?Chapter=0115C>)

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) After the first year, priority enrollment will be given to applicants who have a sibling currently enrolled at Legacy. Children of full time employees and children of board members will also be granted enrollment preference.

Legacy Academy will not require pre-admission activities.

Students enrolled at Legacy Academy will be eligible to re-enroll for the next school year without entering the lottery process. Applicants who were on the waiting list must re-submit an application for the following school year for enrollment. If a student withdraws, parents must complete required documentation. When the transfer school requests the students records, Legacy Academy will fulfill this request. An open seat is created for an applicant on the waitlist if a student withdraws midyear. Waitlisted applicants will be admitted by numerical order if a seat from that grade is available.

Weighted Lottery

Does your school plan to use a weighted lottery?

Yes:

No: x

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

LEA #3

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

	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	LEA 410	LEA 000	LEA 000	LEA 410	LEA 000	LEA 000	LEA 410	LEA 000	LEA 000	LEA 410	LEA 000	LEA 000	LEA 410	LEA 000	LEA 000
Grade 06	85	0	0	85	0	0	85	0	0	85	0	0	85	0	0
Grade 07	85	0	0	85	0	0	85	0	0	85	0	0	85	0	0
Grade 08	85	0	0	85	0	0	85	0	0	85	0	0	85	0	0
Grade 09	85	0	0	85	0	0	85	0	0	85	0	0	85	0	0
Grade 10	85	0	0	85	0	0	85	0	0	85	0	0	85	0	0
Grade 11	0	0	0	75	0	0	75	0	0	75	0	0	75	0	0
Grade 12	0	0	0	0	0	0	75	0	0	75	0	0	75	0	0
	425			500			575			575			575		

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Section IV: Governance and Capacity Concerns and Additional Questions	Reviewer	Page Reference
Status not yet obtained	Shaunda Cooper	Tax-Exempt S
The applicant has 24 months after approval to obtain exempt status.	Shannon Sellers	Tax-Exempt S
Applicant needs to clarify this Exec Board issue: The day to day operation of the school will be delegated to an Executive Board; Dr. Angel L Thurston, Dr. DeShaunda Hampton, and Devyn Cannon who is hired by Legacy Academy and evaluated by the Board of Directors, and who is an ex officio non-voting member of the Board of Directors. The Executive Board are the only employees directly supervised by the board. Legacy Academy will recruit and appoint the Executive Board through traditional recruiting methods. The individuals must possess strong leadership skills and charismatic energy. Is this a group of people charged to run the school?	Alex Quigley	Governance a
Clarity is needed in regards to the Executive Board and the Board of Directors. Has the Executvie Board been chosen? The by-laws say there will be 4 voting members why are all board meember not allowed to vote? By-laws are very basic and need more depth. There is no criteria established for the evaluation of the board, admnistrator, etc. Resumes of board members do not match the list of board members provided in the application.	Shannon Sellers	Governance a
What is the Education Collective? Is that related to Edison Learning? Why is the EMO the chairperson of the board? Does that pose conflicts of interest? What is the role of the Executive Board? How will the board oversee the academic progress of the school? How will the board evaluate the EMO? If the principal is an employee of the EMO, what evaluative responsibility does the board have over the principal?	Jennifer Gnann	Governance a
No concrete data was provided to show academic performacne of other charter schools under the EMO.	Shannon Sellers	Proposed Man
How do other Edison Learning schools fare financially? Expand upon the performance of the highest and lowest performing schools in the Edison network. This was unclear.	Jennifer Gnann	Proposed Man
What percent of your teachers will be licensed from NC? Who will ensure the licensure process is met?	Jessica Kelly	Staffing Pla
The school's proposed salary range and employment benefits for all levels of employment section states that Edison Learning will pay the salary and benefits of the principal. What is the plan for continuing payment and benefits of the principal, should your contract with Edison Learning be terminated?	Shaunda Cooper	Staffing Pla
Expand upon the termination process. Explain this statement: "In the proposal for the Legacy Academy, educators and administrators will not serve in dual positions" when you have a "Chief Visionary" that is also the English Department Chair. Explain the need for so many administrators. What right does the board have if they feel that the principal is not the best fit for the school?	Jennifer Gnann	Staffing Pla
A line item for professional Development was not noted on the expenditure budget. Is Edison Learning responsible for all professional development cost? If not, who will cover the cost of professional development? Does your professional development plan include specific training for your three Exception Children employees? If you are only providing EC training for those in the department, who will train regular education teachers on the needs of EC students within your program?	Shaunda Cooper	Staff Evalua
How will professional development be funded? Will there be a beginning teacher program/additional professional development for new teachers?	Jessica Kelly	Staff Evalua
The marketing plan seems to be very vague. More clarity is needed	Shannon Sellers	Marketing Pl
Is Edison Learning responsible for all teacher recruitment cost? If not, who will cover the cost of teacher recruitment?	Shaunda Cooper	Marketing Pl
Can not require parents to volunteer.	Walter Finnigan	Parent and C
What will the action plan be for students whose parents do not meet required volunteer hours?	Jessica Kelly	Parent and C

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What will the cost be for the parent education initiative in partnering with local community colleges?		
What happens if the parents don't participate in volunteer hours? How will Legacy assist parents in getting bachelor's degrees?	Jennifer Gnann	Parent and C
As a public charter school, you should be admitting students outside of Guilford County. How will you prepare to admit them? How will you market to them?	Jennifer Gnann	Admissions P
Your projected enrollment is 425 for the 2018-2019 school year. Does your survey data support this level of participation in your school's program?	Shaunda Cooper	Projected St
Overall - the structure of the management contract needs to be clarified as well as the school's management structure.	Alex Quigley	Projected St
The school does not plan to use the weighted lottery at this time.	Shaunda Cooper	Weighted Lot

Reviewer	Score
Mike McLaughlin	
Jennifer Gnann	Pass
Eric Sanchez	Fail
Deanna Townsend-Smith	
Robert McOuat	
Walter Finnigan	Fail
Cheryl Turner	
Alex Quigley	Fail
Glenn Allen	
Hilda Parlér	
Shannon Sellers	Pass
Shaunda Cooper	Pass
Alan Hawkes	
Joe Maimone	
Jessica Kelly	Pass

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V. OPERATIONS

Transportation Plan:

Describe in detail the transportation plan that will ensure that no child is denied access to the school due to lack of transportation. The details of this plan should align with the Mission, identified need for the charter school, targeted student population, and the budget proposal.

At Legacy Academy, students will be provided with transportation to and from our school program:

- Parent and stakeholder participation through our quarterly voucher program
- Parents will be required to maintain and submit a Legacy STEEL School Transportation log
- Student attendance report as evidence of travel and attendance to receive reimbursement for travel to and from school
- Assistance via the Guilford County Transportation and Busing Department via free student bus passes

As a school program, the Executive Leadership team and Legacy STEEL Academy board recognizes that transportation will not be an obstacle in students partaking in our STEEL Platform. We will be able to provide a comprehensive transportation model where all learners are provided with free and safe transportation.

School Lunch Plan:

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

The facility we are leasing has a cafeteria that doubles as an auditorium. Students rotate on a consistent grade level schedule for lunch. Students eat meals in the cafeteria, and assemble in the space for school wide meetings, programs, and other school activities that require whole school or large stakeholder attendance. The school will contract a local vendor who services several charter schools in the area to provide a free breakfast and meals for lunch. The vendor receives additional training in regards to state and local requirements governing school nutrition and issuing school lunch calendars to families and staff, food preparation, serving procedures, inventory and ordering, and cleaning procedures to maintain an efficient school lunch program. The vendor delivers pre-packaged meals (utensils, fruit, protein, vegetable, bread, milk or water), and will consist of all areas of nutrition as required by NC Foods and Nutrition for School Programs. Inasmuch, Legacy Academy will participate in National School Lunch Program (NSLP) which will provide the proper food and nutrition for all students at Legacy; hence enabling our school program to offer meals to all students despite their socio-economic status. To maintain student records, a staff member will work in collaboration with the local vendor to log in student participation in the lunch program. The staff member will maintain the privacy of records by being the employee who is present at the time of lunch participation so that students are able to enter lunch numbers into the computer system while coming through the serving line, maintaining records for student accountability for our program. This data will be

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reported to the NSLP as well as required monthly reports. The Board will complete all necessary applications in advance of the school year. If our application is not accepted, we will amend our operating budget to depict a reduction and provide an alternative lunch plan and reimbursement to NSLP.

Civil Liability and Insurance (GS 115C-218.20):

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

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

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$1,000,000		\$.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$.00
Property Insurance	\$0		\$.00
Motor Vehicle Liability	\$1,000,000		\$.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$.00
Other	\$1,000,000		\$.00
Total Cost			\$.00

*The applicant must provide a quote from an insurance provider as part of this application (as Appendix L) to demonstrate the levels of insurance coverage and projected cost.

Health and Safety Requirements:

All public charter schools are required to follow the regulations regarding health and safety as stated in § 115C218.75.

We, the Board members at (Charter School Name) will develop a written safety plan and policies to be shared with staff, parents and students and be available upon inspection from the Department of Public Instruction and local Health Departments.

thursta 09/12/2016

(Board Chair Signature)

(Date)

Facility:

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

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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.

The Legacy Academy Board of Directors (BOD) intends to lease the building located at 201 N. Church St., a building which was previously used as a school building. The building, as we understand, is already partially wired for technology within all classrooms. Upon approval of the application, the BOD and Executive Leadership Team will meet with realtors from the representing broker, Triad Commercial to do a thorough walk through of the building and determine any needs, repairs, updates, and structural renovations that may be necessary so that the building will be up-to-date on or before summer 2017 and a certificate of occupancy may be retained at that time. The building is able to be upfit and there is parking onsite; the building is within reasonable walking distance to the Greensboro bus depot to accommodate student, parent, and community needs.

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.

Cost per square foot is no more than \$54/sq ft.,but the lease term is negotiable. Legacy will propose to lease the building for no more than 337,500 per school year which is outlined in the budget plan. The facilities budget is \$750 per yr per pupil.

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.*

As mentioned, upon approval of the application, the BOD and Executive Leadership Team will meet with realtors from the representing broker, Triad Commercial to do a thorough walk through of the building and determine any needs, repairs, updates, and structural renovations that may be necessary so that the building will be up-to-date on or before summer 2017 and a certificate of occupancy may be retained at that time. However, if the location at 201 N. Church St. falls through, Legacy Academy board is prepared to research other facility options in the Guilford area.

Section V: Operations Concerns and Additional Questions	Reviewer	Page Reference
What are the details of the plan? How can students access the vouchers?	Walter Finnigan	Transportati
How will students with transportation in their IEPs be addressed? How does the voucher program work? What is the purpose of the transportation log? How will reimbursement work?	Jennifer Gnann	Transportati
This transportation plan doesn't meet the criteria outlined. \$63,000 for bus passes?	Alex Quigley	Transportati
How will the voucher system work? Where is the money set aside to reimburse for travel? Have you contacted Guilford Co. Transportation to see if free student bus passes are available? What about students that require transporttion as part of their IEP?	Shannon Sellers	Transportati
In comparison to local LEA what does the applicant anticipate the free and reduced lunch population to be?	Walter Finnigan	School Lunch
As of now, there is a projection of \$0.00 reserve ending the 2018-2019 school year. What area of the budget will you adjust to afford daily lunches for 425 students, in the	Shaunda Cooper	School Lunch

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event you cannot secure a free lunch contract?		
What is the alternate plan if you are not accepted into the NSLP? How will that fit in your budget?	Jennifer Gnann	School Lunch
How will the school be able to provide free breakfast and lunch to the students?	Shannon Sellers	School Lunch
Applicant needs to clarify if they are participating in the freed lunch program. This isn't necessarily clear.	Alex Quigley	School Lunch
Insurance quote is missing.	Jennifer Gnann	Civil Liabil
Insurance quote is incomplete. It doesn't show all required amounts.	Shannon Sellers	Civil Liabil
OVERALL: Transportation plan is disqualifying.	Alex Quigley	Facility and
What is the contingency plan?	Shannon Sellers	Facility and
What is the plan to research other facility options?	Jennifer Gnann	Facility and

Reviewer	Score
Eric Sanchez	Fail
Walter Finnigan	Pass
Alan Hawkes	
Shannon Sellers	Fail
Cheryl Turner	
Joe Maimone	
Deanna Townsend-Smith	
Alex Quigley	Fail
Hilda Parlér	
Jessica Kelly	Pass
Glenn Allen	
Shaunda Cooper	Pass
Jennifer Gnann	Fail
Robert McOuat	
Mike McLaughlin	

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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 1st month average daily membership.

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

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

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

REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS

LEA #1 410 - Guilford County Schools

Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
State Funds	\$4,993.71	425	\$2,122,326.75
Local Funds	\$2,372.86	425	\$1,008,465.50
Federal EC Funds	\$3,395.78	170	\$577,282.60
Totals			\$3,708,074.85

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

INCOME: REVENUE PROJECTIONS	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
-State ADM Funds	\$2,122,327	\$2,496,855	\$2,871,383	\$2,871,383	\$2,871,383
-Local Per Pupil Funds	\$1,008,466	\$1,186,430	\$1,364,395	\$1,364,395	\$1,364,395
-Exceptional Children Federal Funds	\$577,283	\$696,135	\$878,658	\$976,287	\$1,073,915
-Other Funds*	\$645,000	\$61,215	\$64,276	\$67,490	\$70,864
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$4,353,075	\$4,440,635	\$5,178,712	\$5,279,555	\$5,380,557

***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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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									
Administrative & Support Personnel:															
Lead Administrator	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000
Assistant Administrator	1	\$70,000	\$70,000	1	\$70,000	\$70,000	1	\$70,000	\$70,000	1	\$70,000	\$70,000	1	\$70,000	\$70,000
Dean Of Students	1	\$42,000	\$42,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000
Student And Family Director	.26	\$38,500	\$10,010	.26	\$38,500	\$10,010	.26	\$38,500	\$10,010	1	\$38,500	\$38,500	1	\$38,500	\$38,500
Counselor	1	\$45,000	\$45,000	1	\$45,000	\$45,000	2	\$45,000	\$90,000	2	\$45,000	\$90,000	2	\$45,000	\$90,000
Community Outreach Director	1	\$42,000	\$42,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000
Clerical	1	\$31,000	\$31,000	2	\$31,000	\$62,000	2	\$31,000	\$62,000	2	\$31,000	\$62,000	2	\$31,000	\$62,000
Finance Officer	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$50,000	\$50,000
User Support Technician	1	\$45,000	\$45,000	1	\$45,000	\$45,000	1	\$45,000	\$45,000	1	\$45,000	\$45,000	1	\$45,000	\$45,000
Data Owner	1	\$37,500	\$37,500	1	\$37,500	\$37,500	1	\$37,500	\$37,500	1	\$37,500	\$37,500	1	\$37,500	\$37,500
A - Total Admin and Support:	9.26		\$452,510	10.26		\$483,510	11.26		\$528,510	12		\$557,000	12		\$557,000
Instructional Personnel:															
Core Content Teacher(s)	13	\$40,000	\$520,000	14	\$40,000	\$560,000	17	\$40,000	\$680,000	20	\$40,000	\$800,000	20	\$40,000	\$800,000
Electives/Specialty Teacher(s)	4	\$40,000	\$160,000	5	\$40,000	\$200,000	6	\$40,000	\$240,000	7	\$40,000	\$280,000	7	\$40,000	\$280,000
Exceptional Children Teacher(s)	3	\$45,000	\$135,000	5	\$45,000	\$225,000	6	\$45,000	\$270,000	6	\$45,000	\$270,000	6	\$45,000	\$270,000

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Instructional Support	1	\$70,000	\$70,000	2	\$57,500	\$115,000	2	\$57,500	\$115,000	2	\$57,500	\$115,000	2	\$57,500	\$115,000
B - Total Instructional Personnel:	21		\$885,000	26		\$1,100,000	31		\$1,305,000	35		\$1,465,000	35		\$1,465,000
A+B = C - Total Admin, Support and Instructional Personnel:	30.2 6		\$1,337,510	36.2 6		\$1,583,510	42.2 6		\$1,833,510	47		\$2,022,000	47		\$2,022,000
Administrative & Support Benefits															
Health And Wellness	9	\$8,991	\$80,919	10	\$9,665	\$96,650	11	\$10,390	\$114,290	12	\$11,169	\$134,028	12	\$12,007	\$144,084
Retirement Plan--Other	9	\$4,741	\$42,669	10	\$4,560	\$45,600	11	\$4,531	\$49,841	12	\$4,377	\$52,524	12	\$4,377	\$52,524
Medicare	9	\$729	\$6,561	10	\$701	\$7,010	11	\$697	\$7,667	12	\$673	\$8,076	12	\$673	\$8,076
Social Security	9	\$3,117	\$28,053	10	\$2,998	\$29,980	11	\$2,979	\$32,769	12	\$2,878	\$34,536	12	\$2,878	\$34,536
D - Total Admin and Support Benefits:	36		\$158,202	40		\$179,240	44		\$204,567	48		\$229,164	48		\$239,220
Instructional Personnel Benefits:															
Health And Wellness	21	\$8,991	\$188,811	26	\$9,665	\$251,290	31	\$10,390	\$322,090	35	\$11,169	\$390,915	35	\$12,007	\$420,245
Retirement Plan--Other	21	\$3,974	\$83,455	26	\$3,990	\$103,730	31	\$3,970	\$123,062	35	\$3,947	\$138,150	35	\$3,947	\$138,150
Social Security	21	\$2,613	\$54,870	26	\$2,623	\$68,200	31	\$2,610	\$80,910	35	\$2,595	\$90,830	35	\$2,595	\$90,830
Medicare	21	\$611	\$12,832	26	\$613	\$15,950	31	\$610	\$18,922	35	\$607	\$21,243	35	\$607	\$21,243
E - Total Instructional Personnel Benefits:	84		\$339,969	104		\$439,170	124		\$544,984	140		\$641,137	140		\$670,467
D+E = F - Total Personnel Benefits	120		\$498,171	144		\$618,410	168		\$749,551	188		\$870,301	188		\$909,687
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	45.2 6		\$610,712	50.2 6		\$662,750	55.2 6		\$733,077	60		\$786,164	60		\$796,220
B+E = H - Total Instructional Personnel (Salary & Benefits)	105		\$1,224,969	130		\$1,539,170	155		\$1,849,984	175		\$2,106,137	175		\$2,135,467
G+H = J - TOTAL PERSONNEL	150. 26		\$1,835,681	180. 26		\$2,201,920	210. 26		\$2,583,061	235		\$2,892,301	235		\$2,931,687

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

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
	Administrative & Support:					
Office:	Office Supplies	\$10,000	\$10,200	\$10,404	\$10,612	\$10,824
	Postage	\$4,250	\$5,000	\$5,750	\$5,750	\$5,750
	Computers & Software	\$297,500	\$52,500	\$52,500	\$0	\$0
	Communications & Telephone	\$110,000	\$115,500	\$121,275	\$127,339	\$133,706
	Copier leases	\$5,000	\$5,100	\$5,202	\$5,306	\$5,412
Management Company	Contract Fees	\$548,250	\$657,900	\$771,717	\$787,151	\$802,894
Professional Contract	Student Accounting	\$8,500	\$10,000	\$11,500	\$11,500	\$11,500
	Financial	\$20,000	\$20,400	\$20,806	\$21,224	\$21,649
	Other Professional	\$11,760	\$13,440	\$15,540	\$17,640	\$17,640
Facilities	Facility Lease/Mortgage	\$318,750	\$375,000	\$431,250	\$431,250	\$431,250
	Furniture And Equipment	\$212,500	\$37,500	\$37,500	\$0	\$0
	Custodial Contract	\$120,000	\$123,600	\$127,308	\$131,127	\$135,061
	Insurance (pg19)	\$68,000	\$71,400	\$74,970	\$78,719	\$82,654
Utilities	Utilities	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000
Transportation	Bus Passes	\$63,750	\$75,000	\$86,250	\$86,250	\$86,250
Other	Marketing	\$35,000	\$35,700	\$36,414	\$37,142	\$37,885
	Travel	\$10,000	\$10,200	\$10,404	\$10,612	\$10,824
	Worker'S Compensation	\$19,960	\$22,456	\$25,736	\$28,752	\$28,752
	Unemployment	\$9,980	\$11,228	\$12,868	\$14,376	\$14,376
	K - TOTAL Administrative & Support Operations	\$1,943,200	\$1,722,124	\$1,927,394	\$1,874,750	\$1,906,427
	Instructional:					
Classroom Technology	Software	\$212,500	\$250,000	\$287,500	\$287,500	\$287,500
	Instructional Equipment	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
Instructional Contract	Staff Development	\$20,194	\$25,000	\$25,000	\$25,000	\$25,000
	Substitute Teachers	\$34,000	\$38,000	\$46,000	\$54,000	\$54,000
Books and Supplies	Instructional Materials	\$85,000	\$100,000	\$115,000	\$115,000	\$115,000
	Curriculum/Texts	\$212,500	\$37,500	\$37,500	\$0	\$0
	L - TOTAL Instructional Operations	\$574,194	\$460,500	\$521,000	\$491,500	\$491,500
	K+L = M - TOTAL OPERATIONS	\$2,517,394	\$2,182,624	\$2,448,394	\$2,366,250	\$2,397,927

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Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
J - TOTAL PERSONNEL	\$1,835,681	\$2,201,920	\$2,583,061	\$2,892,301	\$2,931,687
M - TOTAL OPERATIONS	\$2,517,394	\$2,182,624	\$2,448,394	\$2,366,250	\$2,397,927
J+ M =N TOTAL EXPENDITURES	\$4,353,075	\$4,384,544	\$5,031,455	\$5,258,551	\$5,329,614
Z - TOTAL REVENUE	\$4,353,075	\$4,440,635	\$5,178,712	\$5,279,555	\$5,380,557
Z - N = SURPLUS / (DEFICIT)	-\$0	\$56,091	\$147,257	\$21,004	\$50,943

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.

Enrollment projections for Legacy Academy is based on school choice and programming. There are no education alternative options in the northern part of Guilford County and the border of Alamance-Burlington. In regards to distance, the nearest public school is over 20 miles from the county line in McCleansville, NC. Within the central part of Northern Guilford County, there is not a charter school nor is there any private school to service stakeholders who desire excellence in education, a school with programming to address the growing industry of STEEL-focused careers in Guilford County, and an option to alleviate overcrowding within the current GCS assigned schools in that area. Our projections for the first year indicates an estimated 18% decrease in student population from the 1 middle school and 1 high school in the area of which both have a combined enrollment of 2,444 students. With this projected enrollment, Legacy STEEL Academy is projecting an initial enrollment for AY1 between 450-480 students from the Northern Guilford part of Greensboro, NC.

NC Report Card, Retrieved on September 1, 2016, from ncreportcards.ondemand.sas.com.

<https://www.google.com/northernguilford>

http://www1.gcsnc.com/redistrict_maps/pdf/DEMOGRAPHICS%20FOR%20APPROVED%20REDISTRICTING%20MAPS%20--%20Northern%20Area.pdf

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

EdisonLearning has a long history of successful startups and opening schools. None of the schools currently contracting with EdisonLearning for management services are on fiscal probation or have not met their needs. The company, school staff and Charter Boards or authorizing authorities (where applicable) work together in a collaborative effort to ensure the school has adequate cash flow to manage the school operations through expense management and timely funding draw downs.

Does the budget rely on sources of funds other than state, county, and federal (e.g. loans,

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donations etc.? If so, please provide the source and amount. Be sure that the appropriate assurances documentation is provided in the appendices

Legacy STEEL Academy has started the research process but would not actually start receiving gifts-in-kind and services-in-kind until the charter school is approved. We are also waiting for North Carolina to be approved for the federal grant. However, Legacy STEEL Academy has researched the following foundations as potential partners:

- * The Community Foundation of Greater Greensboro
- * Weaver Foundation
- * Marion Stedman Covington Foundation
- * The Community Foundation of Greater Greensboro
- * United Way of Greater Greensboro
- * The Garden Cathedral Home of the Power House of Deliverance Ministries
- * Directory of NC Non-Profits
- * Guilford Non-Profit Consortium

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

25:1

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

Yes. Most of EdisonLearnings partners use Quickbooks. EdisonLearning researches and follows all local, state and federal rules and regulations for procurement with guidelines for verbal and or written quotes, Request for Proposals (RFP) on contracted services, formal sealed competitive bids when required and based on size of contracts or laws, and the use of municipal/governmental cooperative agreements.

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

The budget aligns with Legacy Academy's mission by reflecting the needs of the students in the school's target population. The staffing, contracted services, and model presented in the budget are critical to implement Legacy Academy's unique STEEL model and produce successful student outcomes. EdisonLearnings professional development and management services have also been included in the budget. The Board and EdisonLearning will avoid any delays that may compromise enrollment by preparing for such cases ahead of time in the budget, design, facility, and development of the school. The essential outcome of EdisonLearnings work with partnership schools is to look at the long-term capacity to sustain academic progress. Throughout the company's history, EdisonLearning's purpose has not been to establish startup relationships that run indefinitely, but to help and guide both charter and district schools to assemble a solid and healthy budget to support the goals of the school for years to come.

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 school's goal for the general fund balance will be 2% of the school's budget for the years 2017-2022. The board will also develop a board policy for fund balance to ensure the school maintains a healthy annual fund

64

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

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balance.

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

The cost per square foot is no more than \$54/sq ft., but the lease term is negotiable. Legacy STEEL Academy will propose to lease the building for no more than 337,500 per school year which is outlined in the Legacy Academy budget plan. The facilities budget is \$750 per year per pupil.

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*

No. The school is not getting any assets from other sources.

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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?

EdisonLearning implements a detailed budgeting and forecasting process for each of its schools. Using historical information, school improvement plans, and pricing guides, EdisonLearning's Controller works closely with the School Operations Manager (SOM) and Principal to develop a budget that reflects expected school revenue. This budget is reviewed and approved by the Board and the information is entered into the proprietary excel file provided by EdisonLearning to upload into the EdisonLearning accounting and reporting system, so that budget managers can track school-level financials throughout the year.

Internal Accounting Systems-

The school's staffing design includes a critical operational and financial position to support the on-site staff. The school's Controller, is usually a CPA, with several years of education finance experience. The Controller works with the Program Director, the Board, and EdisonLearning's Director of Achievement to develop the annual budget, track the results, make corrections as needed and ensure compliance with state and local requirements. This position also works with the school staff to review and confirm the bi-weekly payroll reports to ensure accuracy, to review, approve and code invoices and to ensure the school adheres to the annual budget. The controller trains the staff in the critical systems and policies and works very closely with the school staff to ensure the proper accruals are recorded each month, grants are coded and tracked properly and annual audits run smoothly. Detailed below are key processes that ensure the schools finances and operations run at optimal levels.

Financial Management & Accounting Systems-

Legacy Academy will put in place a number of different systems and processes to ensure appropriate financial management and record keeping, at both the corporate and school level. The school staff has access to the accounting system (Lawson) that houses the school's financial information and can be mapped to state required accounts and reporting formats. In addition, there are web-based systems for Accounts Payable and POs that include approval thresholds and coding steps to ensure items are properly coded and approved prior to release for processing and payment.

Segregation of Resources-

The company's financial system is capable of maintaining separate financial statements, utilizing all the above financial modules. We will set up a separate site code for the Charter School and will ensure all inflows and outflows are appropriately marked with those codes, keeping them separate from any other company financial resources.

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

Legacy STEEL Academy does not have any related party transactions.

Provide the name and contact information of the independent audit firm who will conduct the annual

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financial statement audit. If a firm has yet to be identified please list the firms the board has investigated.

Audit Firm:

CohnReznick, LLP

1301 Avenue of the Americas

New York, NY 10019

212-297-0400

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Section VI: Financial Plan Concerns and Additional Questions	Reviewer	Page Reference
From what other location would students come to your school? They won't all come from Guilford.	Jennifer Gnann	Budget Reven
What other LEA's could you possibly draw students?	Shannon Sellers	Budget Reven
Where do the "other funds" come from? Appendix M states the planning committee has "started researching" these funds?	Jennifer Gnann	Total Budget
What does a .26 position look like? Seems administrative heavy.	Jennifer Gnann	Personnel Bu
How will you be competitive in the job market if your personnel are not given a financial increase over a five year span? Do you need a second full-time clerical position year two with a relatively small staff? Is your data owner, the data manager or a system that holds the data? If the data owner is a system that holds data, will you be using PowerSchool?	Shaunda Cooper	Personnel Bu
Is money allotted to cover related services such as school psychology, speech/language therapy, occupational therapy, physical therapy, etc for students with disabilities?	Glenn Allen	Personnel Bu
Projected amounts for office supplies and postage seem unrealistic to start a school. Will the amount of money set aside for transportation be adequate if you are reimbursing parents?	Shannon Sellers	Operations B
Office supplies are under budgeted. How was the insurance budgeted if there isn't a quote received yet?	Jennifer Gnann	Operations B
What are the per student fees for the bus passes? How will staff development be spent? Why \$212,500 on textbooks when majority of classes online?	Walter Finnigan	Operations B
What ways can you alter the projected budget to reflect a surplus of any amount for the first year?	Shaunda Cooper	Total Expend
The first year has a 0 fund balance with over \$600 in the "other" category of revenue. What happens if that money isn't donated? How will the budget be able to make sense if the enrollment isn't as projected?	Jennifer Gnann	Total Expend
The fiscal stability of other Edison Schools was not discussed. How can the applicant be certain that Edison will assist Legacy in remaining stable as well?	Jennifer Gnann	Budget Narra
Question 3: Plans are in place to ask for donations, but none have been received.		
Internal controls are very vague. Who has access to the accounting system?	Shannon Sellers	Financial Au
Internal controls are not thoroughly described. What is the system for signing checks, ordering, tracking money within the school, from the lunch program and the bus voucher	Walter Finnigan	Financial Au

Reviewer	Score
Shannon Sellers	Pass
Eric Sanchez	Pass
Shaunda Cooper	Pass
Cheryl Turner	
Alex Quigley	Fail
Glenn Allen	
Alan Hawkes	
Jennifer Gnann	Fail
Jessica Kelly	Pass
Robert McOuat	
Hilda Parlér	

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Walter Finnigan	Fail
Mike McLaughlin	
Joe Maimone	
Deanna Townsend-Smith	

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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).

thursta Date: 09/16/2016

Applicant Signature:

The foregoing application is submitted on behalf of Legacy STEEL 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: thursta

Board Position: Dr. Angel L. Thurston

Signature: _____

Date: 09/16/2016

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

Notary Public

Official Seal

Legacy STEEL Academy - Our mission is to produce highly literate students able to face challenges, build their communities, and apply technology through rigorous standards utilizing the STEEL platform so that they might create a lasting legacy of success.

My commission expires: _____, 20_____.

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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.

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

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.

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

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

<u>CSAB Votes</u>	
No	Yes

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

<u>Initial Screening</u>

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Mission, Purposes, and Goals	- a_quigley
Education Plan	<p>(1) The applicant is proposing to serve students in grades 6 - 12 and the Curriculum per grade span should capture middle school and high school</p> <p>(2) The applicant did not provide a breakdown of the 9 - 12 Core Content Electives - esanchez</p>
Governance and Capacity	<p>(1) Applicant has 24 months after approval to obtain tax exempt status</p> <p>(2) The Articles of Incorporation are missing. Per GS 115C.218.1 applicants must be a nonprofit to apply</p> <p>(3) Board member resumes and board member forms completed do not match</p> <p>(4) Applicant needs to provide board member resumes, board member forms, and national criminal background checks for all members listed in the application</p> <p>(5) The EMO financial history is not provided</p> <p>(6) Board member resumes are not available.</p> <p>- esanchez</p>
Operations	<p>How will Legacy provide transportation to students with disabilities if it is stated as a need on their IEP?</p> <p>How will transportation be funded? Is there a maximum distance that the school will provide transportation for students? - esanchez</p>
Financial Plan	<p>(1) Applicant has 24 months after approval to obtain tax exempt status</p> <p>(2) The Articles of Incorporation are missing. Per GS 115C.218.1 applicants must be a nonprofit to apply</p> <p>(3) Board member resumes and board member forms completed do not match</p> <p>(4) Applicant needs to provide board member resumes, board member forms, and national criminal background checks for all members listed in the application</p> <p>(5) The EMO financial history is not provided</p> <p>(6) Board member resumes are not available.</p> <p>- cheryl_turner</p>
OVERALL	<p>- dtsmith840</p> <p>- shannon1974</p> <p>- shannon1974</p>

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External Evaluator

Mission, Purposes, and Goals	<p><u>Mission Statement</u> Define Challenges. The mission statement needs to define the organization. - walter_finnigan</p> <p><u>Mission Statement</u> What challenges are referred to in the mission? - shannon1974</p> <p><u>Educational Need and Targeted Student Population</u> What information can you provide that would support your explanation for the evidence of need? - scoopergrad</p> <p><u>Educational Need and Targeted Student Population</u> For projected enrollment you state there will be an 18% decrease in student population from local schools; with your first year projection grades 6-10 is this accurate. How did you predict these numbers? - jessica_kelly</p> <p><u>Educational Need and Targeted Student Population</u> Projected enrollment of 425 students for year 1 has no data to support the need for the charter school. Is there data to support the survey in Appendix A? What makes a STEEL curriculum different from a Guilford County curriculum and why would parents select the STEEL curriculum instead of the Guilford County curriculum? - walter_finnigan</p> <p><u>Educational Need and Targeted Student Population</u> There is no clear rationale for the projected enrollment. Appendix A1 does not contain data. What evidence is there that a STEEL focused school is needed? - shannon1974</p> <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: http://www.dpi.state.nc.us/charterschools/schools/map. - dtsmith840</p> <p><u>Purposes of Proposed Charter School</u> The applicant states they have leader speakers who support the school and are willing to speak to the students as part of the four pillars of legacy who are those individuals and what are the roles in the community? - walter_finnigan</p> <p><u>Purposes of Proposed Charter School</u> There is no alignment to the 4 pillars in the mission. Have you already connected with the Leaders that support the school and will come present to the students? - shannon1974</p> <p><u>Goals for the Proposed Charter School</u> What does PRIDE stand for and where is that indicated? - jessica_kelly</p> <p><u>Goals for the Proposed Charter School</u> Expand upon the academic goals of the students. - jengnann</p> <p><u>Goals for the Proposed Charter School</u> The goals for the proposed charter school are to be written as specific and measurable goals for the first five years of operation. Concern: Goals are very broad, need to focus on</p>
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	<p>each area within the stated goal. - walter_finnigan</p> <p><u>Goals for the Proposed Charter School</u> Goals are vague. How do the goals align to the mission only testing is specifically mentioned? Goals need to be expanded on in all areas. - shannon1974</p>
<p>Education Plan</p>	<p><u>Instructional Program</u> The instructional program appears to be PBL, but there is no mention of STEEL to support the mission. How is STEEL going to be incorporated in the instructional program? - shannon1974</p> <p><u>Curriculum and Instructional Design</u> Curriculum outline in appendix is only from 6th grade; do you have this for all grade levels you are planning on opening with in first year?</p> <p>With a 4 day school week; how will you meet state requirements for hours of instruction? How will this school calendar work with other local schools/ - jessica_kelly</p> <p><u>Curriculum and Instructional Design</u> The grade span shows high school. Why is a high school curriculum not fully discussed? How does ecourses fit with PBL? Is your instructional model PBL or blended learning? How will the students have enough instructional time with only a 4 day week? How long will the school day be? - jengnann</p> <p><u>Curriculum and Instructional Design</u> Why does the instructional calendar not have any key to ask playing what is on the actual calendar? This calendar does not coincide with the proposed mission and educational plan.</p> <p>Appendix B is only for grade 6 which does not reflect all grades. Will the applicant be providing any other classes other than those offered online with edisonlearning? Difficult to understand from the appendices and the written narrative. - walter_finnigan</p> <p><u>Curriculum and Instructional Design</u> Is the instructional program PBL or Blended Learning or both? Only PBL is discussed in the instructional programming. Only middle school is mentioned for the basic learning environment, what about the high school? The projected grade span for the school is grades 6-8, but your projected numbers show high school. This seems to be contradictory. With a 4 day week, what will be the school hours and how will this calendar align with the LEA's calendar? Will this meet the required instructional time? Appendix B and B2 along with the narrative are confusing. Exactly what grade levels will be served? At different points in the application it says 6-8, but projected numbers include grades 9 - 12. - shannon1974</p> <p><u>Curriculum and Instructional Design</u> High School school course catalog does not appear to be aligned to the NC courses of Math I, Math II. The curriculum map is just a list of the standards by unit and lacks depth. - a_quigley</p> <p><u>Special Programs and "At-Risk" Students</u> In the Special Programs and "At-Risk" section of the application, you state that Edison Learning will assist Legacy with multi-tiered intervention strategies. Where in this section do you address students who currently have IEPs (Individualized Educational Plans)?</p>

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	<p>Who will handle IEPs and ensuring that services for these students are met? - scoopergrad</p> <p><u>Special Programs and "At-Risk" Students</u> Where will the funding come from to ensure these specific populations needs are met? Once students are enrolled will these needs for these specific populations be readdressed based on student population? - jessica_kelly</p> <p><u>Special Programs and "At-Risk" Students</u> Expand upon how AG students will receive specialized instruction. - jengnann</p> <p><u>Special Programs and "At-Risk" Students</u> When will members of the team on tier 1 support group meet and what is the criteria that would cause a student to be targeted? - walter_finnigan</p> <p><u>Special Programs and "At-Risk" Students</u> How will academically gifted students be identified? How will you differentiate instruction for AG students? How will you monitor ELL student progress? - shannon1974</p> <p><u>Exceptional Children – Identification and Records</u> It is stated that Legacy will work with Guilford County Schools to obtain records of Exceptional Children. As a public charter, you may receive students from outside of Guilford County. Are you prepared to communicate with other counties as well for student record purposes? - scoopergrad</p> <p><u>Exceptional Children – Identification and Records</u> What is your process for identification of students with disabilities as they enter your school? What is your Child Find Process? How will you maintain record confidentiality and compliance? - kevin_allen</p> <p><u>Exceptional Children – Identification and Records</u> How will you obtain records? How will you utilize ChildFind? How will you identify students for services that are not currently being served as EC? - jengnann</p> <p><u>Exceptional Children – Identification and Records</u> The applicant makes no mention of working with other counties being a charter school and with the proposed location of the school it is highly likely they will have students from other counties besides Guilford County. The applicant also fails to answer question three on properly managing records. - walter_finnigan</p> <p><u>Exceptional Children – Identification and Records</u> How will you identify Exceptional Children that are not currently being served? How will you request records? - shannon1974</p> <p><u>Exceptional Children – Education Programming</u> Plan reflects that Legacy will work with Guilford County Schools Board to ensure the needs of exceptional students are met. Plan does not reflect how Legacy will provide the full continuum of services. - kevin_allen</p> <p><u>Exceptional Children – Education Programming</u> Expand upon your understanding of how to serve students with severe needs within your school. Expand upon your understanding of an IEP team. - jengnann</p> <p><u>Exceptional Children – Education Programming</u></p>
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	<p>The applicant states that if the needs of a child are so unique that the school cannot meet the needs, they will be referred to another educational placement. How is this implementing a full range of programs? The applicant needs to expand its understanding of an IEP team. The plan for providing and serving exceptional children is not clear. - shannon1974</p> <p><u>Student Performance Standards</u> What is your policy and standards for promoting students with disabilities? - kevin_allen</p> <p><u>Student Performance Standards</u> What assessment tools will be utilized by this school for student performance as well as staff evaluations? - jessica_kelly</p> <p><u>Student Performance Standards</u> Expand upon your goals as listed in Mission, Purpose, and Goals section. How will students be promoted? What assessment tool will be utilized? How will data drive instruction? - jengnann</p> <p><u>Student Performance Standards</u> What specific assessments will be used to help drive student instruction. - walter_finnigan</p> <p><u>Student Performance Standards</u> Policies for promotion are unclear. Student performance goals are unclear or nonexistent in this section. What assessments will be used? What data will be used to drive instruction? - shannon1974</p> <p><u>Student Conduct and Discipline</u> In the example section #2, one of the examples reads "Aggravated". Is that a complete phrase used to describe the infraction? Will you include each of these possible discipline strategies in your parent and student handbook? Example (In school work detail). - scoopergrad</p> <p><u>Student Conduct and Discipline</u> "Legacy Academy can only suspend students identified as Intellectually Disabled with either written agreement of the parent/guardian or the written approval of the NC Charter School Organization. Legacy Academy may suspend students with disabilities and cease educational services for up to five consecutive schools days or 15 cumulative school days in one school year without providing special education procedural safeguards"--this does not comply with Policies Governing Services for Students with Disabilities. - kevin_allen</p> <p><u>Student Conduct and Discipline</u> Expand upon your understanding of suspension for students with Intellectual Disabilities. What about students with other disabilities? - jengnann</p> <p><u>Student Conduct and Discipline</u> How will the principles teachers and other school professionals be trained to hold high expectations for student learning and behavior. Creating a school culture like this requires professional development and materials. This professional development is not planned in the application. - walter_finnigan</p> <p><u>Student Conduct and Discipline</u> The plan for suspension of exceptional children is incorrect and violates federal law. -</p>
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	<p>shannon1974</p> <p><u>Student Conduct and Discipline</u> Applicant needs to refer to existing policies and practices. Appears to be lack of understanding of how policies currently are implemented in the state. - a_quigley</p>
<p>Governance and Capacity</p>	<p><u>Tax-Exempt Status 501 (c)(3)</u> Status not yet obtained - scoopergrad</p> <p><u>Tax-Exempt Status 501 (c)(3)</u> The applicant has 24 months after approval to obtain exempt status. - shannon1974</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> What is the Education Collective? Is that related to Edison Learning? Why is the EMO the chairperson of the board? Does that pose conflicts of interest? What is the role of the Executive Board? How will the board oversee the academic progress of the school? How will the board evaluate the EMO? If the principal is an employee of the EMO, what evaluative responsibility does the board have over the principal? - jengnann</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Clarity is needed in regards to the Executive Board and the Board of Directors. Has the Executvie Board been choosen? The by-laws say there will be 4 voting members why are all board meember not allowed to vote? By-laws are very basic and need more depth. There is no criteria established for the evaluation of the board, administrator, etc. Resumes of board members do not match the list of board members provided in the application. - shannon1974</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Applicant needs to clarify this Exec Board issue: The day to day operation of the school will be delegated to an Executive Board; Dr. Angel L Thurston, Dr. DeShaunda Hampton, and Devyn Cannon who is hired by Legacy Academy and evaluated by the Board of Directors, and who is an ex officio non-voting member of the Board of Directors. The Executive Board are the only employees directly supervised by the board. Legacy Academy will recruit and appoint the Executive Board through traditional recruiting methods. The individuals must possess strong leadership skills and charismatic energy. Is this a group of people charged to run the school? - a_quigley</p> <p><u>Proposed Management Organization (EMO/CMO)</u> How do other Edison Learning schools fare financially? Expand upon the performance of the highest and lowest performing schools in the Edison network. This was unclear. - jengnann</p> <p><u>Proposed Management Organization (EMO/CMO)</u> No concrete data was provided to show academic performacne of other charter schools under the EMO. - shannon1974</p> <p><u>Staffing Plans, Hiring, and Management</u> The school's proposed salary range and employment benefits for all levels of employment section states that Edison Learning will pay the salary and benefits of the principal. What is the plan for continuing payment and benefits of the principal, should your contract with</p>

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	<p>Edison Learning be terminated? - scoopergrad</p> <p><u>Staffing Plans, Hiring, and Management</u> Expand upon the termination process. Explain this statement: "In the proposal for the Legacy Academy, educators and administrators will not serve in dual positions" when you have a "Chief Visionary" that is also the English Department Chair. Explain the need for so many administrators. What right does the board have if they feel that the principal is not the best fit for the school? - jengnann</p> <p><u>Staffing Plans, Hiring, and Management</u> What percent of your teachers will be licensed from NC? Who will ensure the licensure process is met? - jessica_kelly</p> <p><u>Staff Evaluation and Professional Development</u> A line item for professional Development was not noted on the expenditure budget. Is Edison Learning responsible for all professional development cost? If not, who will cover the cost of professional development?</p> <p>Does your professional development plan include specific training for your three Exception Children employees? If you are only providing EC training for those in the department, who will train regular education teachers on the needs of EC students within your program? - scoopergrad</p> <p><u>Staff Evaluation and Professional Development</u> How will professional development be funded?</p> <p>Will there be a beginning teacher program/additional professional development for new teachers? - jessica_kelly</p> <p><u>Marketing Plan</u> Is Edison Learning responsible for all teacher recruitment cost? If not, who will cover the cost of teacher recruitment? - scoopergrad</p> <p><u>Marketing Plan</u> The marketing plan seems to be very vague. More clarity is needed - shannon1974</p> <p><u>Parent and Community Involvement</u> What happens if the parents don't participate in volunteer hours? How will Legacy assist parents in getting bachelor's degrees? - jengnann</p> <p><u>Parent and Community Involvement</u> What will the action plan be for students whose parents do not meet required volunteer hours?</p> <p>What will the cost be for the parent education initiative in partnering with local community colleges?</p> <p>- jessica_kelly</p> <p><u>Parent and Community Involvement</u> Can not require parents to volunteer. - walter_finnigan</p> <p><u>Admissions Policy</u> As a public charter school, you should be admitting students outside of Guilford County.</p>
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	<p>How will you prepare to admit them? How will you market to them? - jengnann</p> <p><u>Projected Student Enrollment (Table)</u> Your projected enrollment is 425 for the 2018-2019 school year. Does your survey data support this level of participation in your school's program? - scoopergrad</p> <p><u>Projected Student Enrollment (Table)</u> Overall - the structure of the management contract needs to be clarified as well as the school's management structure. - a_quigley</p> <p><u>Weighted Lottery</u> The school does not plan to use the weighted lottery at this time. - scoopergrad</p>
<p>Operations</p>	<p><u>Transportation Plan</u> How will students with transportation in their IEPs be addressed? How does the voucher program work? What is the purpose of the transportation log? How will reimbursement work? - jengnann</p> <p><u>Transportation Plan</u> What are the details of the plan? How can students access the vouchers? - walter_finnigan</p> <p><u>Transportation Plan</u> How will the voucher system work? Where is the money set aside to reimburse for travel? Have you contacted Guilford Co. Transportation to see if free student bus passes are available? What about students that require transportation as part of their IEP? - shannon1974</p> <p><u>Transportation Plan</u> This transportation plan doesn't meet the criteria outlined. \$63,000 for bus passes? - a_quigley</p> <p><u>School Lunch Plan</u> As of now, there is a projection of \$0.00 reserve ending the 2018-2019 school year. What area of the budget will you adjust to afford daily lunches for 425 students, in the event you cannot secure a free lunch contract? - scoopergrad</p> <p><u>School Lunch Plan</u> What is the alternate plan if you are not accepted into the NSLP? How will that fit in your budget? - jengnann</p> <p><u>School Lunch Plan</u> In comparison to local LEA what does the applicant anticipate the free and reduced lunch population to be? - walter_finnigan</p> <p><u>School Lunch Plan</u> How will the school be able to provide free breakfast and lunch to the students? - shannon1974</p> <p><u>School Lunch Plan</u> Applicant needs to clarify if they are participating in the freed lunch program. This isn't necessarily clear. - a_quigley</p> <p><u>Civil Liability and Insurance</u> Insurance quote is missing. - jengnann</p> <p><u>Civil Liability and Insurance</u></p>

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	<p>Insurance quote is incomplete. It doesn't show all required amounts. - shannon1974</p> <p><u>Facility and Facility Contingency Plan</u> What is the plan to research other facility options? - jengnann</p> <p><u>Facility and Facility Contingency Plan</u> What is the contingency plan? - shannon1974</p> <p><u>Facility and Facility Contingency Plan</u> OVERALL: Transportation plan is disqualifying. - a_quigley</p>
<p>Financial Plan</p>	<p><u>Budget Revenue Projections from Each LEA (Table)</u> From what other location would students come to your school? They won't all come from Guilford. - jengnann</p> <p><u>Budget Revenue Projections from Each LEA (Table)</u> What other LEA's could you possibly draw students? - shannon1974</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Where do the "other funds" come from? Appendix M states the planning committee has "started researching" these funds? - jengnann</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> How will you be competitive in the job market if your personnel are not given a financial increase over a five year span?</p> <p>Do you need a second full-time clerical position year two with a relatively small staff?</p> <p>Is your data owner, the data manager or a system that holds the data? If the data owner is a system that holds data, will you be using PowerSchool? - scoopergrad</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Is money allotted to cover related services such as school psychology, speech/language therapy, occupational therapy, physical therapy, etc for students with disabilities? - kevin_allen</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> What does a .26 position look like? Seems administrative heavy. - jengnann</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> What are the per student fees for the bus passes? How will staff development be spent? Why \$212,500 on textbooks when majority of classes online? - walter_finnigan</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Office supplies are under budgeted. How was the insurance budgeted if there isn't a quote received yet? - jengnann</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Projected amounts for office supplies and postage seem unrealistic to start a school. Will the amount of money set aside for transportation be adequate if you are reimbursing parents? - shannon1974</p> <p><u>Total Expenditure Projections (Table)</u> What ways can you alter the projected budget to reflect a surplus of any amount for the</p>

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	<p>first year? - scoopergrad</p> <p><u>Total Expenditure Projections (Table)</u> The first year has a 0 fund balance with over \$600 in the "other" category of revenue. What happens if that money isn't donated? How will the budget be able to make sense if the enrollment isn't as projected? - jengnann</p> <p><u>Budget Narrative</u> The fiscal stability of other Edison Schools was not discussed. How can the applicant be certain that Edison will assist Legacy in remaining stable as well?</p> <p>Question 3: Plans are in place to ask for donations, but none have been received. - jengnann</p> <p><u>Financial Audits</u> Internal controls are not thoroughly described. What is the system for signing checks, ordering, tracking money within the school, from the lunch program and the bus voucher - walter_finnigan</p> <p><u>Financial Audits</u> Internal controls are very vague. Who has access to the accounting system? - shannon1974</p>
OVERALL	<p><u>Acceleration</u> Are you able to provide evidence based off of your survey results in Apendix A? - jessica_kelly</p> <p><u>Acceleration</u> Expand upon need. If there is a current lack of industry in the area and the county has currently 11 charters, what evidence is there for acceleration? - jengnann</p> <p><u>Acceleration</u> Appendix A requires a partnership from a four or two year institution in higher education. Is this partnership an established partnership? If established what are the details of the programs offered. - walter_finnigan</p> <p><u>Acceleration</u> You say a site is needed where there are no charter schools, but then say there are 11 in Guilford County; why is there a need for acceleration in Guilford County? Do you have documentation for the partnerships with the various community colleges? The results of the Survey in Appendix A were not available. Is there data that is missing? - shannon1974</p> <p><u>Acceleration</u> You have attached a survey as (appendix A1). Do you have data that captures the finding of the survey?</p> <p>Your application states that you will partner with higher education institutions. Have partnerships been established and agreed upon between agencies mentioned, pending the approval of the application/school? - scoopergrad</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Your projected enrollment is 425. Does your survey data support this level of participation in your school's program? - scoopergrad</p>

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	<p><u>Grade Levels Served and Total Student Enrollment:</u> What evidence do you have that the number of students can be achieved? - jengnann</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Concern: No clear relationship with a college or university is establish or proven. There is no documentation that demonstrates or provides proof for this to be an accelerated process. - walter_finnigan</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> What data supports the projected enrollment numbers? - shannon1974</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> There is a lack of depth in the research to support this many students starting on year 1. - a_quigley</p>
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Charter School Advisory Board Subcommittee	
Mission, Purposes, and Goals	
Education Plan	
Governance and Capacity	
Operations	
Financial Plan	
OVERALL	

Overall Summary	
Initial Screening 09/30/2016	<p>The Office of Charter Schools deemed this application incomplete on September 30, 2016. The following is need for the application evaluation:</p> <p>(1) The applicant is proposing to serve students in grades 6 - 12 and the Curriculum per grade span should capture middle school and high school</p> <p>(2) The applicant did not provide a breakdown of the 9 - 12 Core Content Electives</p> <p>(3) The Articles of Incorporation are missing. Per GS 115C.218.1 applicants must be a nonprofit to apply</p>

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	<p>(4) Board member resumes and board member forms completed do not match</p> <p>(5) Applicant needs to provide board member resumes, board member forms, and national criminal background checks for all members listed in the application</p> <p>(6) The EMO financial history is not provided</p> <p>(7) The document included as Appendix M to support the additional funds outlined in the "Other Funds" portion of the document does not signify actual support.</p> <p>(8) Appendix N - IRS Form 990 Missing</p> <p>Applicant responded to the incomplete submission request on October 7, 2016.</p>
<p>Application Review</p>	<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. Board members and members of the proposed EMO partner, Edison, were present for the application review, discussion, and clarification opportunity.</p> <p>The Performance Committee (PFC), led by Mr. Alex Quigley discussed each major section for the proposed application.</p> <p>Mr. Quigley sought clarification on the proposed schools acceleration request. According to the acceleration policy, the proposed applicant did not receive consideration to accelerate its opening for 2017-18.</p> <p>Overall there were major concerns from the PFC in each section of the application. The plan lacked specificity and there was no clear direction or path for the proposed instructional program.</p> <p>Ms. Turner outlined the misalignment throughout the application.</p> <p>Mr. Quigley outlined the curriculum plan was surface level and a copy and paste of the Common Core Standards organized and chunked.</p> <p>Mr. Sanchez outlined the goals in the proposed application was ambiguous and there was misalignment throughout the application.</p> <p>Ms. Parler expressed concerns on how the school planned to deliver educational services to its students as the current plan has Guilford County being the responsible entity to deliver services.</p> <p>Mr. Maimone outlined the goals specified for measuring success depends totally on Edison and had concerns for the management fees outlined by the EMO.</p> <p>Clarification was sought on the structure of the organizational chart outlined in the proposed application. A board member present attempted to explain the relationship of the education collective, the founding board, school staff, and administration.</p> <p>Overall the PFC expressed its concerns with the proposed application. Mr. Maimone made a motion not to forward Legacy STEEL Academy to the full CSAB for interview</p>

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	<p>and encouraged better board development as well as application development. Mr. Sanchez seconded. The motion passed unanimously.</p> <p>Mr. Maimone made a motion to the full CSAB for Legacy STEEL Academy not to receive an interview. Ms. Parler seconded. The motion passed unanimously.</p>
Application Interview	
OVERALL	